



WFMCRM

Installation Instructions

Contact: support@blirt.co

In Australia: 1300 859 323, Rest Of The World: +61 7 3188 5411

Blirt!®



Connect your Salesforce customers to Workflowmax or Xero Practice manager.

WFMCRM is a Salesforce App, available in the AppExchange. Now you can quickly convert opportunities from Salesforce into jobs within WorkflowMax or Xero Practice Manager and manage your entire sales and production process with a few clicks.

About WFMCRM

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WFMCRM is a Salesforce App that connects [Salesforce.com](https://www.salesforce.com) to [Workflowmax.com](https://www.workflowmax.com) or [Xero Practice Manager](https://www.xero.co.nz/practice-manager).

Why? It allows you to run world class CRM with best in class tools from Xero.

[Workflowmax.com](https://www.workflowmax.com) is a quote, job and invoice management platform for professional service organizations.

[Xero Practice Manager](https://www.xero.co.nz/practice-manager) is practice management software for Accountants which allows you to see what's going on inside your business.

WFMCRM is a connector built by Blirt, a leading marketing & technology group headquartered in Australia.

WFMCRM Salesforce Edition Compatibility

Available for Professional &
Enterprise and above.

Installation Instructions

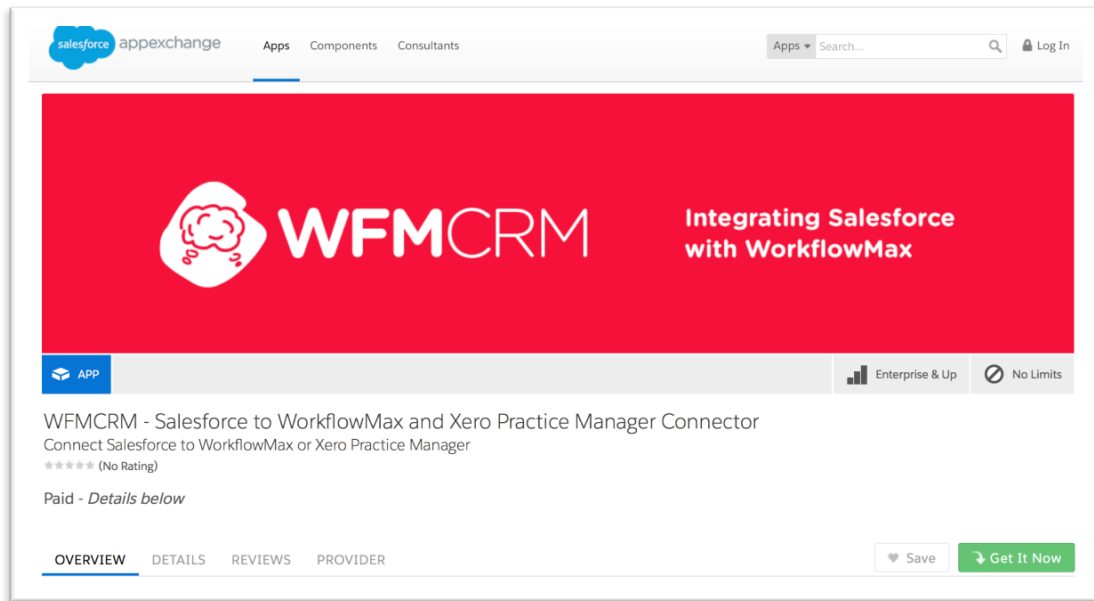
Download and install the app

Download WFMCRM app from the Salesforce AppExchange and follow the instructions on screen to install into your Salesforce Org

IMPORTANT: PROFESSIONAL EDITION USERS

Please review and complete additional steps for installation here:

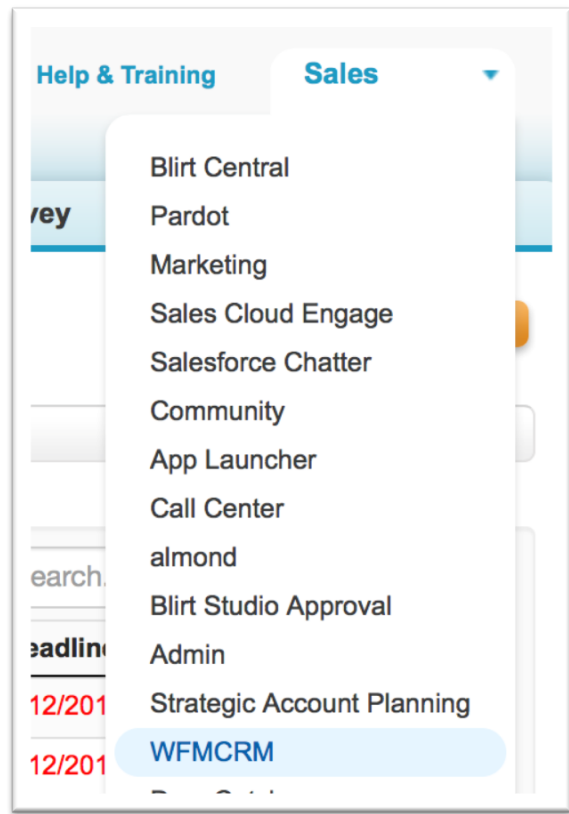
<http://support.blirt.co/customer/en/portal/articles/2631699-professional-edition-set-up->



Installation Instructions

Open WFMCRM via the app drop down

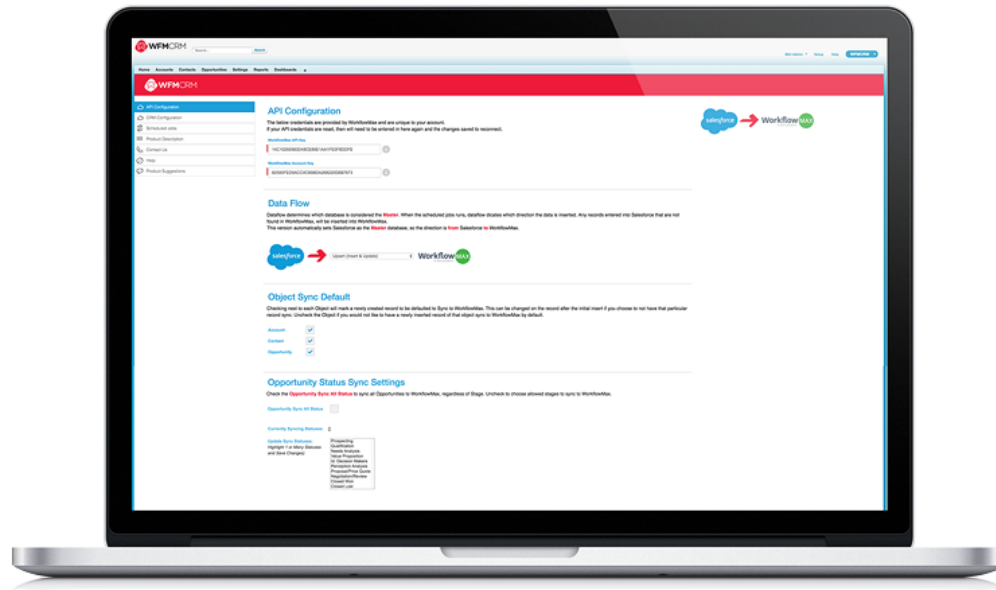
On the right hand side of your screen go the App menu and choose WFMCRM from the drop down options.



Installation Instructions

Open the Settings Tab

1. Choose the settings Tab within the WFMCRM app and this will open to the WFMCRM settings page.
2. Complete the set up on this page to connect Salesforce to Workflowmax; you will be guided through the API Key, Data Flow, Object Selection and Opportunity Sync Status



Installation Instructions

API Connection

Request your API credentials from your Workflowmax or Xero Practice Manager support services.

These are unique to you. They will supply you with the API Key and the Account Key.

This tells Salesforce where to send the information.

WorkflowMax API Key		14C10
WorkflowMax Account Key		EDF3:

Installation Instructions

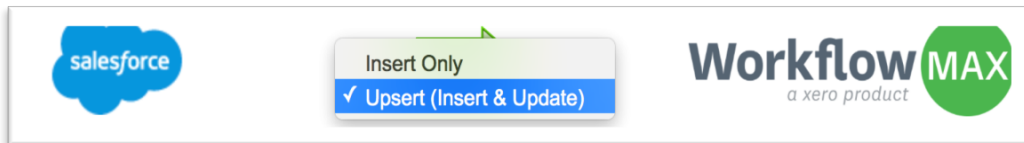
Data flow

Dataflow determines which database is considered the **Master**.

When the scheduled jobs runs, dataflow dictates which direction the data is inserted. Any records entered into Salesforce that are not found in WorkflowMax, will be inserted into WorkflowMax.

This version automatically sets Salesforce as the **Master** database, so the direction is **from** Salesforce **to** WorkflowMax.

Future versions may include a two way sync once the Workflowmax API time stamps Workflowmax Data. Currently this is not available.



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Object Sync Defaults

Choose which Salesforce Objects you want to push by default. Your options are Account, Contact and Opportunity.

Accounts push to Clients
Contact push to Contacts
Opportunity push to Jobs

Account ☒

Contact ☒

Opportunity ☒

Installation Instructions

Opportunity Status Sync

WFMCRM allows you to choose when to push data according to the Salesforce Opportunity Stage.

You will see your Opportunity stages appear at this section and you can select to either sync at all stages or at from a specific stage.

To select the stages to sync highlight the stages you wish to sync

Once done, Save Changes.

Installation Instructions

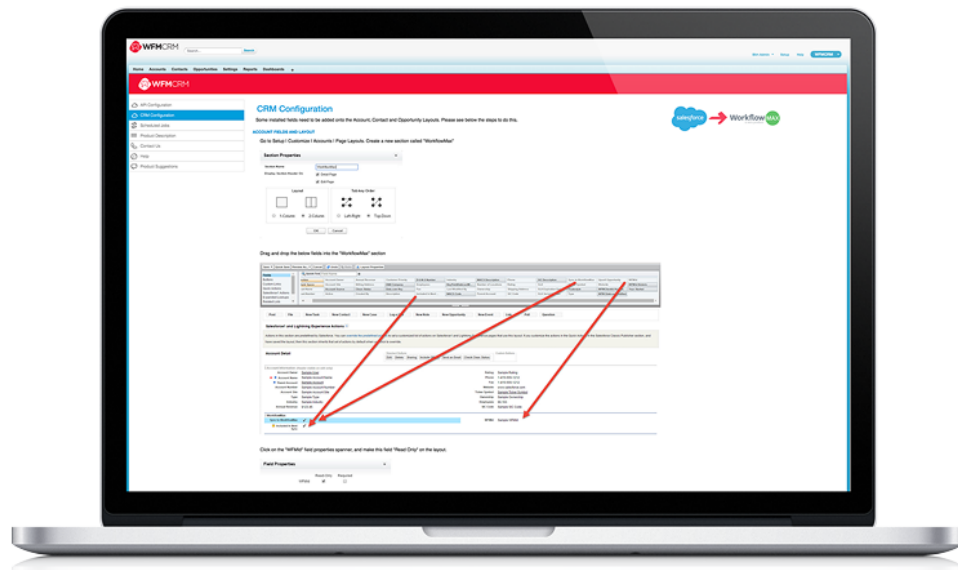
Page Layout Instructions

You will need to make a few small page layout edits (no code required).

The instructions for this are within the app settings on the left hand menu.

The menu item is CRM Configuration.

Follow these instructions to edit page layouts and add the required fields to your Opportunity page layouts.



Professional Edition Users

IMPORTANT: PROFESSIONAL EDITION USERS

Please review and complete additional steps for installation here:

<http://support.blirt.co/customer/en/portal/articles/2631699-professional-edition-set-up->

For Support

Get in contact

support@blirt.co

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Support service available Australian business hours.

Custom Integrations

Additional Configuration

If you require custom integration, please contact us.

It is possible to connect to Workflowmax Portal – for those businesses who run multiple Workflowmax accounts.

Or if you have a specific need, contact us on hello@blirt.co or visit www.blirt.com.au/hello

A person is holding a lit sparkler, which is glowing brightly with sparks flying out. The person's face is partially visible in the background, looking towards the sparkler. The overall scene is dark, with the light from the sparkler illuminating the person's face and the surrounding area.

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THANK YOU

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