

Documentation - Using Workglue with Wordpress

Most small businesses, and many large corporations, use Wordpress for their marketing website. Wordpress is cost-effective, very flexible and easy to manage for non-technical people. All those attributes result in amazing numbers of Wordpress sites - according to a recent study, Wordpress now powers about 30% of the entire internet. Of the world's top 10 million websites (by traffic) one-third are running on Wordpress.

If you have a Wordpress site it should be fairly easy to modify your "Contact Us" or "Get an Estimate" forms and have those inquiries deposited automatically into Workglue as a new Lead. This document should give you, or your Wordpress consultant, all the information needed to streamline your business a little more.

The Workglue Part

Start by gathering some information. Go into Workglue as an administrator and select the "Custom Data" page under the Support menu. Copy or print the section called Bid/Job Types. An examples is shown below:

Customize Bid/Job Types

List your own custom options to define the type of jobs you handle. These options will be avail.

We have provided a typical starting set, but you can rename these, or add more options for cat

The color options, if you save any, will be used on certain reports to highlight the selected job t

1:	Residential Interior	<input type="text"/>	<input type="color"/>
2:	Commercial Exterior	<input type="text"/>	<input type="color"/>
3:	Residential Exterior	<input type="text"/>	<input type="color"/>
4:	Commercial Interior	<input type="text"/>	<input type="color"/>
5:	Industrial	<input type="text"/>	<input type="color"/>
6:	HOA Interior	<input type="text"/>	<input type="color"/>
7:	HOA Exterior	<input type="text"/>	<input type="color"/>

After printing or saving that information go to the Account page under the Support menu. On the bottom right of your Account information page you will see something called API KEY as shown below. This is a long string of random numbers and letters - it is unique to your Workglue account, so don't copy from the picture below. Copy or print your own string of letters/numbers and keep it handy for later.

API KEY

This key can be used to connect other applications to your Workglue account. For example, you could have a "Contact Us" form on your website. By adding this key to the form your customer inquiries would automatically appear as new Leads in Workglue.

API KEY = ialUfTbRX93rIEAYi9YfFFnlt8XAW7r6

If you ever need to cancel/reset your API KEY for security or other reasons press the button below. The old key will be deleted and replaced by a new key.

The Wordpress Part

Now you are ready to set up Wordpress. Go into your Wordpress system and click on the menu item called Plugins on the left side of the Wordpress Dashboard. You will need a plugin called Gravity Forms. It might already be in your system because it's probably the most popular "forms" plugin. If it's not there, install Gravity Forms.

After Gravity Forms is installed and activated, go to Add-Ons under the Forms menu. Look for a Gravity Forms Add-On called "Webhooks Add-On." This is the component that will actually communicate with Workglue. It's really just another plugin that adds a few new features into Gravity Forms, so Install and activate that from the Gravity Forms Add-Ons page.

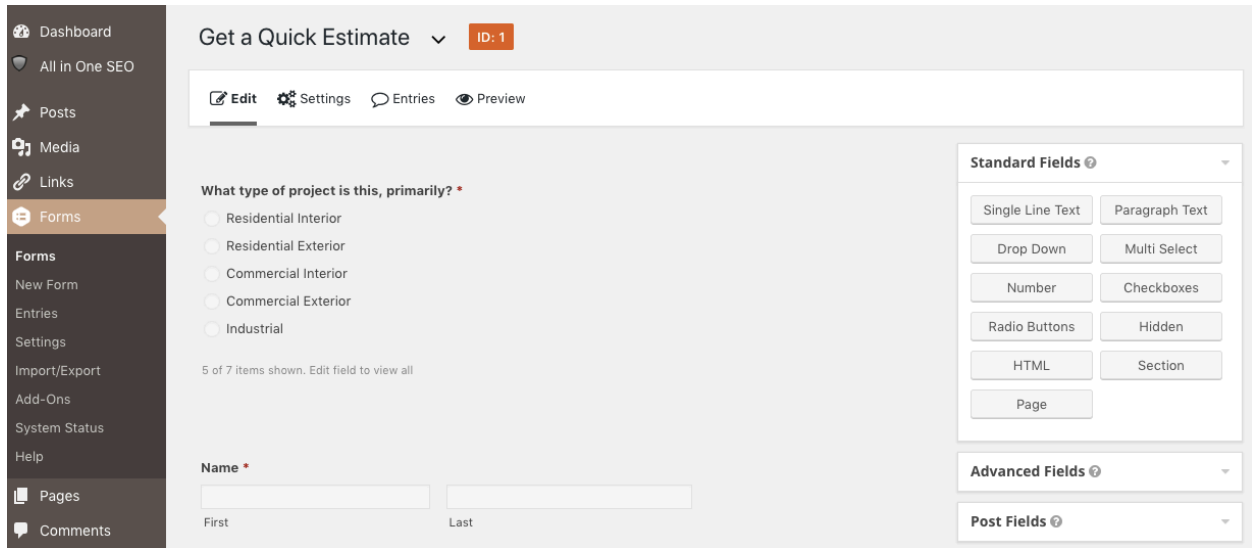
The Gravity Forms Part

To make the next part as easy as possible we have created a standard form that you can import. Download the file from the following address:

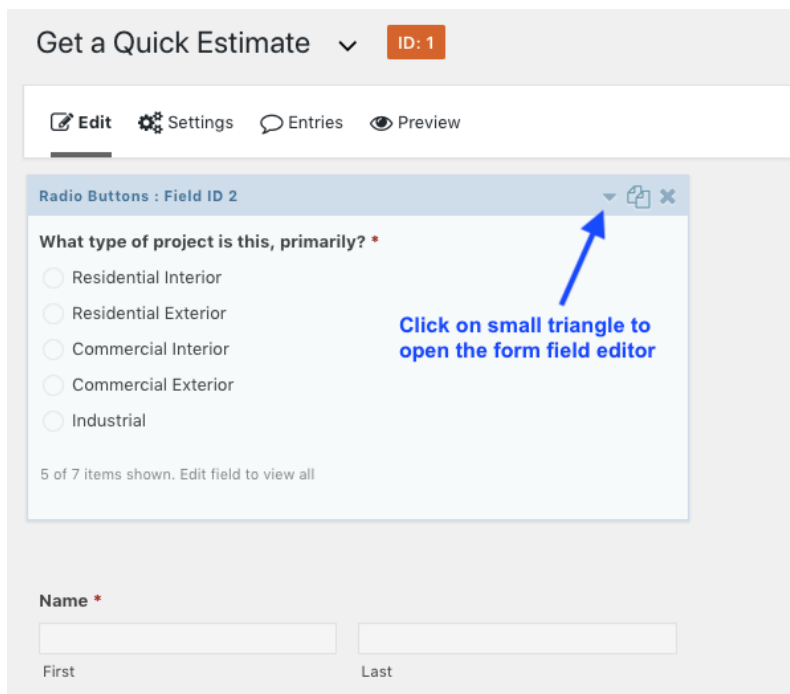
<https://pm.workglue.com/api/Workglue-GravityForms-template.json>

Back on the Wordpress Dashboard page look under the Forms menu and select Import/Export. Then pick Import and import the file that you downloaded. This should create a form called “Get a Quick Estimate.” This is just a simple starting point and you can customize it as much as you like.

Now you are ready to customize the form. Click the menu item called Forms, then select our estimate sample for editing. You should see something like the following picture:



We can't teach you all about Gravity Forms - they have a lot of training and support information on their website. For now scroll down the form to see the data fields we have included. The red asterisk next to some items indicates that they are required. Move your mouse over the first question (“What type of project is this...”) to highlight it, then click the triangle:



After clicking on the small triangle you should see the form field editor open so you can make changes. You should see the following:

	Label	Value		
<input type="radio"/>	Residential Interior	1	<input type="checkbox"/>	show values
<input type="radio"/>	Residential Exterior	3	<input type="checkbox"/>	
<input type="radio"/>	Commercial Interior	4	<input type="checkbox"/>	
<input type="radio"/>	Commercial Exterior	2	<input type="checkbox"/>	
<input type="radio"/>	Industrial	5	<input type="checkbox"/>	

Get the information about your personalized Job Types that you copied from Workglue earlier. Replace the Labels and Values shown in our sample with your own information. You can simply type over the existing information. Use the + and - buttons to remove items or add new lines.

Be very careful to enter the numbers from Workglue into the Values column to match your own Job Types in the Labels column. If you ever make changes to your Job Types in Workglue you have to remember to go here in Wordpress and adjust your form accordingly.

When you have finished entering your Job Types press the Update button on the right side of the page to save your changes.

The final step is to configure the “Web Hook” to send the customer’s information to Workglue. To do this look at the top of the page for the Settings menu, and below that pick Webhooks.

Then press the button to “Add New.” You should see something similar to the next picture. Select the options as shown. You can copy and paste the following line for the “Request URL”:

<https://pm.workglue.com/api/incoming-gf-lead.php>

Feed Settings

Name [?] * Workglue Feed 1
 Whatever you want to call it

Request URL [?] * https://pm.workglue.com/api/incoming-gf-lead.php

Request Method [?] * POST
 Request Format [?] * FORM
 These three must be set exactly as shown here

Request Headers [?]

Name	Value
Select a Name	Select a Field +

Request Body [?] * All Fields Select Fields
 Pick this option

Field Values [?] *

Key	Value
Custom Key	Select a Field +

The bottom section in the picture above shows Key / Value pairs that you have to set correctly to “map” the form fields to the data field names that Workglue will recognize.

Begin by entering a “key” called first_name and then select the “value” that matches whatever you want to put into Workglue in the contact’s first name field. Press + to add another item. The picture on the following page shows the final result. Proper spelling is very important for the “keys” otherwise the information will be missing in Workglue.

- * first_name
- * last_name
- company
- * email
- * phone
- * address1
- address2
- * city
- * state
- * zip
- job_type
- description
- * WGapikey

Note that first_name, last_name and job_type must have an underscore between words.

The items marked with an asterisk are required in Workglue. If you make any changes to your form always make sure those fields, at a minimum, are required. Anything else added to the form is optional.

The last one is special because it doesn’t come from the customer. After entering the key name WGapikey select “Add Custom Value” from the drop-down list. That will open a text input field. Paste into there the API KEY you got from your Account page in Workglue at the very beginning of this process. Press the “Update Settings” button and you are done.

Request Body *

All Fields Select Fields

Field Values *

Key	Value		
<input type="text" value="first_name"/>	Name (First)	+	-
<input type="text" value="last_name"/>	Name (Last)	+	-
<input type="text" value="company"/>	Company	+	-
<input type="text" value="email"/>	Email	+	-
<input type="text" value="phone"/>	Phone	+	-
<input type="text" value="address1"/>	Address (Street Address)	+	-
<input type="text" value="address2"/>	Address (Address Line 2)	+	-
<input type="text" value="city"/>	Address (City)	+	-
<input type="text" value="state"/>	Address (State / Province)	+	-
<input type="text" value="zip"/>	Address (ZIP / Postal Code)	+	-
<input type="text" value="job_type"/>	What type of project is this,	+	-
<input type="text" value="description"/>	Briefly describe your projec	+	-
<input type="text" value="WGapikey"/>	ialUfTbRX93rIEAYi9YfFFi	+	-

You will have to add the form to the appropriate page on your website. There are several different ways to do that, either using short codes or a special feature depending on the theme you are using.

After getting the form on a web page you should be able to submit the form and see the new Lead appear immediately in Workglue.

Changes to Consider:

Before starting to customize the form or add more input fields make sure everything in our basic sample is working properly, and that all information is arriving in Workglue. After that you can make a variety of changes to make customer follow-up easier for your sales people:

- Configure the Gravity Forms **Confirmations** and **Notifications** to be appropriate for your website and company. **Confirmations** are the message that customers see after submitting the form. **Notifications** are generally emails you receive when a customer submits the form.

- Depending on the type of work you do it might be good to make the job description a “required” field. That way the customer has to tell you something about the project. In some businesses that isn’t necessary, but other times it might help funnel the lead to the proper sales person, or otherwise follow up appropriately.
- Add additional fields to the form if you need additional information from the customer. That information won’t go into Workglue today, but if you set up the proper Gravity Forms Notification email, all of the customer information will arrive in the email.