

WUFOOCONNECTOR FOR DAYLITE

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General

WufooConnector for Daylite 4

About WufooConnector

Wufoo (<http://www.wufoo.com>) is a web application that helps anybody build online forms. Wufoo forms can be easily integrated into any web site and data collected by the form is being stored in an automatically created database which is accessible from virtually anywhere.

Features

WufooConnector provides the following features:

- Transfer of Wufoo forms into Daylite forms
- Import of data collected by Wufoo forms into Daylite

The import can trigger the following actions:

- Create a person in Daylite
- Create a company in Daylite
- Create and delegate a task in Daylite
- Create a project in Daylite
- Create an opportunity in Daylite
- Execute a custom script
- Assign categories and keywords to records imported by Wufoo connector
- The import can be triggered automatically based on a selectable time interval or manually.

System Requirements

Operating System: OS X 10.7 or newer

Daylite Version: 4.2 or newer

Setup

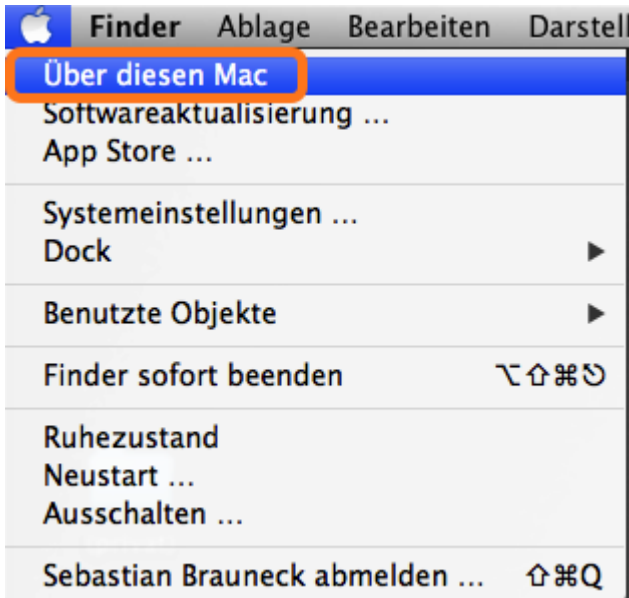
Installation

WufooConnector should be installed on one computer only in order to avoid duplicate records!

1. WufooConnector requires Daylite 4.2 or newer. To check your version open the Daylite menu --> About Daylite



2. WufooConnector requires OS X 10.7 or newer. To check your OS X version select the Apple menu --> About this Mac

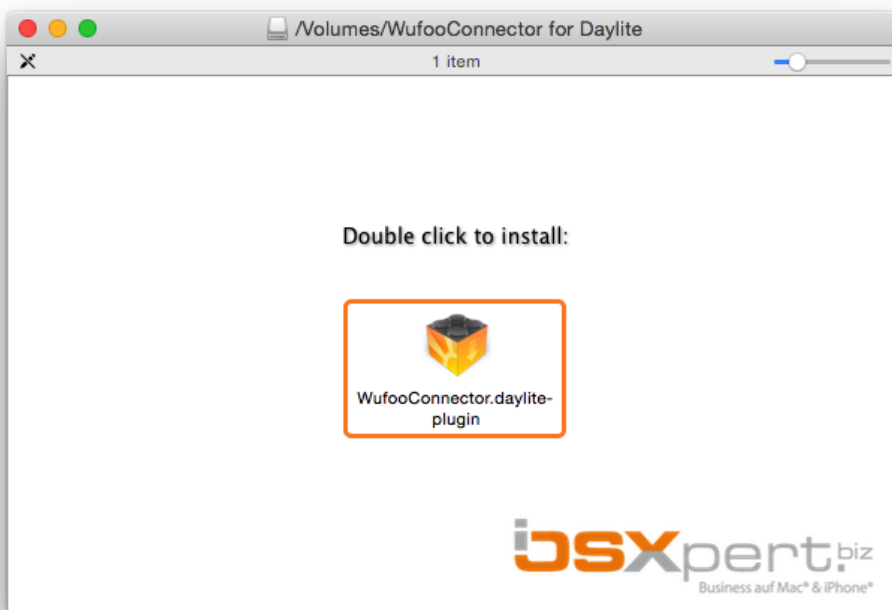


3. Open the WufooConnector for Daylite4 DMG file

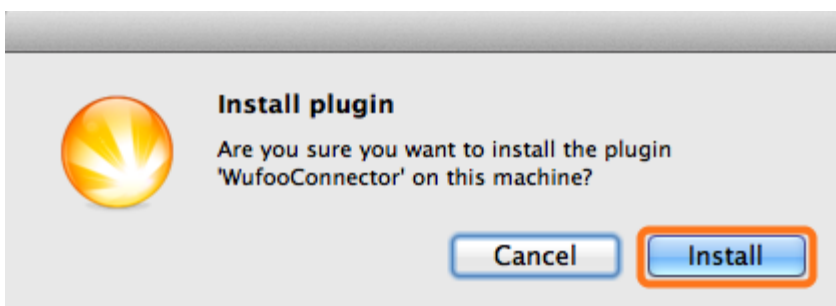


WufooConnector for Daylite 4.dmg

4. Double click the WufooConnector.daylite-plugin file



5. Install the plug-in by clicking Install



6. To finalize the installation click Restart Daylite

The plug-in needs to be configured before the first use. More info on the configuration you'll find in chapter [Set up API Key](#).



Success

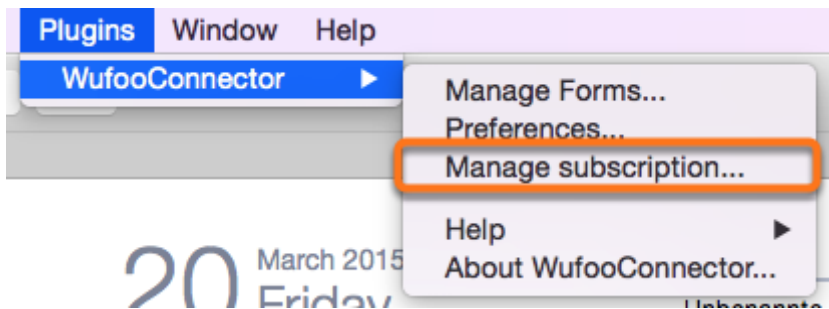
Plugin 'WufooConnector' Successfully installed.
Daylite will now restart for the changes to take effect.

Restart Daylite

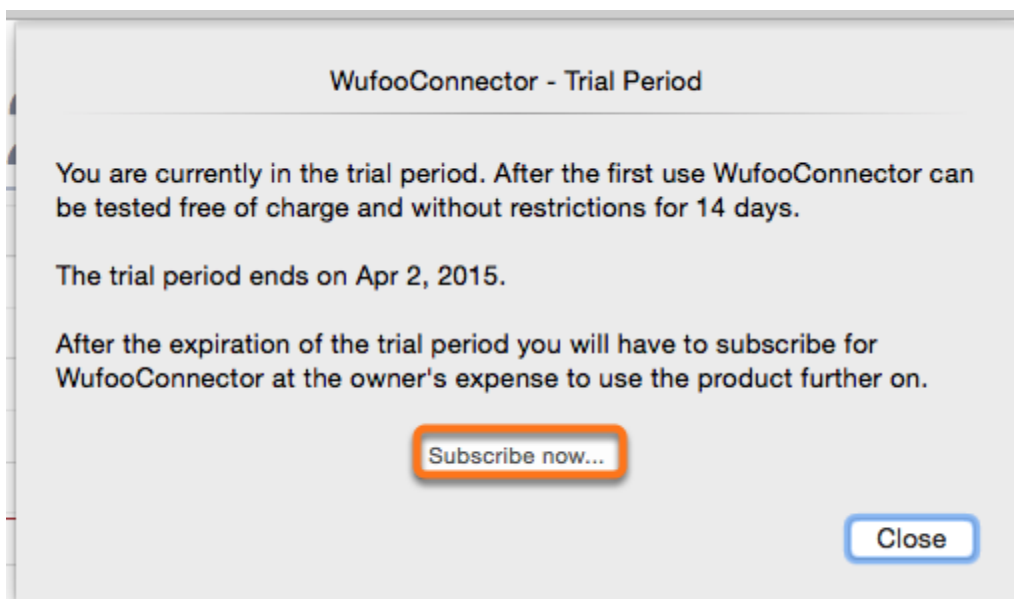
Licensing

If you would like to use WufooConnector after the 14 day trial period you'll need a valid subscription. If you haven't already subscribed, please follow these steps to do so:

1. Start Daylite
2. Select the Daylite menu Plugins > WufooConnector > Manage subscription...



3. Click Subscribe now... to enter the subscription process



4. Accept the license agreement
5. Click Next

WufooConnector - Subscribe

Subscribe to WufooConnector at \$29.00 per month. The WufooConnector service may be cancelled on a monthly base.

4



With the subscription of WufooConnector you accept our [license agreement](#)

5

Back

Next

6. After filling out the form click Complete Order

WufooConnector

bsxpert.biz
Business auf Mac® & iPhone®

Your Order

 WufooConnector for Daylite 4 and Daylite 5	\$29.00
\$29.00 Monthly	
Tax	\$0.00
Total	\$29.00

 Update Coupon

 Complete Order



< >

Back

7. Close the dialog after successfully subscribing

WufooConnector - Subscription

Status: **active**

Expiration date: -

Monthly Cost: **\$29.00**

Actions

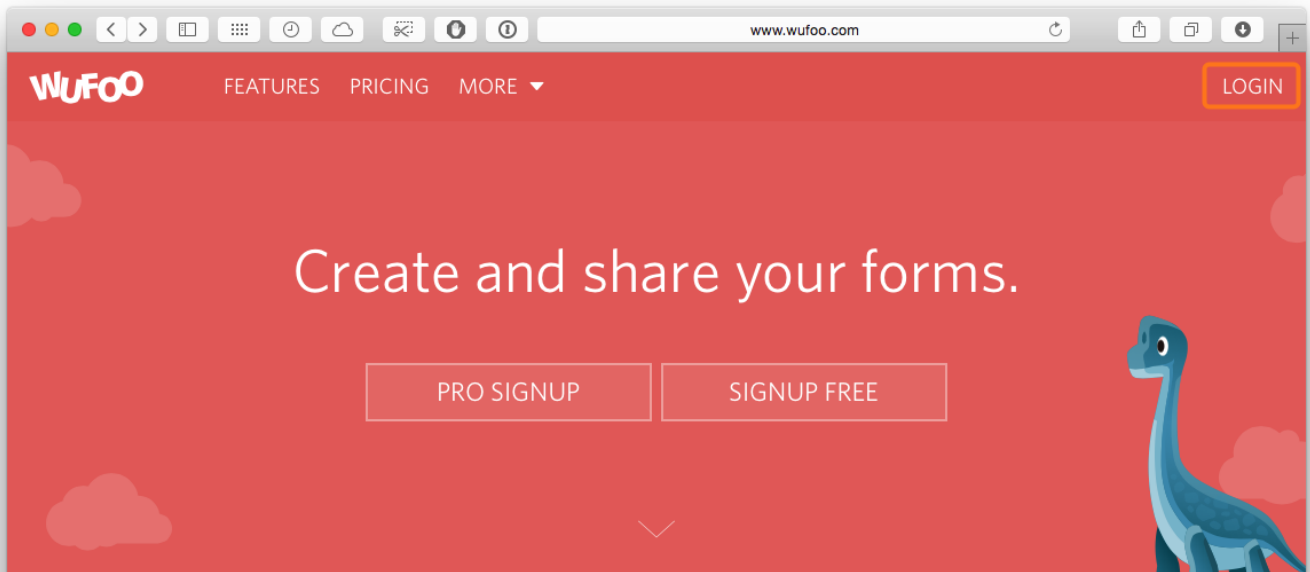
[Cancel subscription / Update payment method](#)

[Close](#)

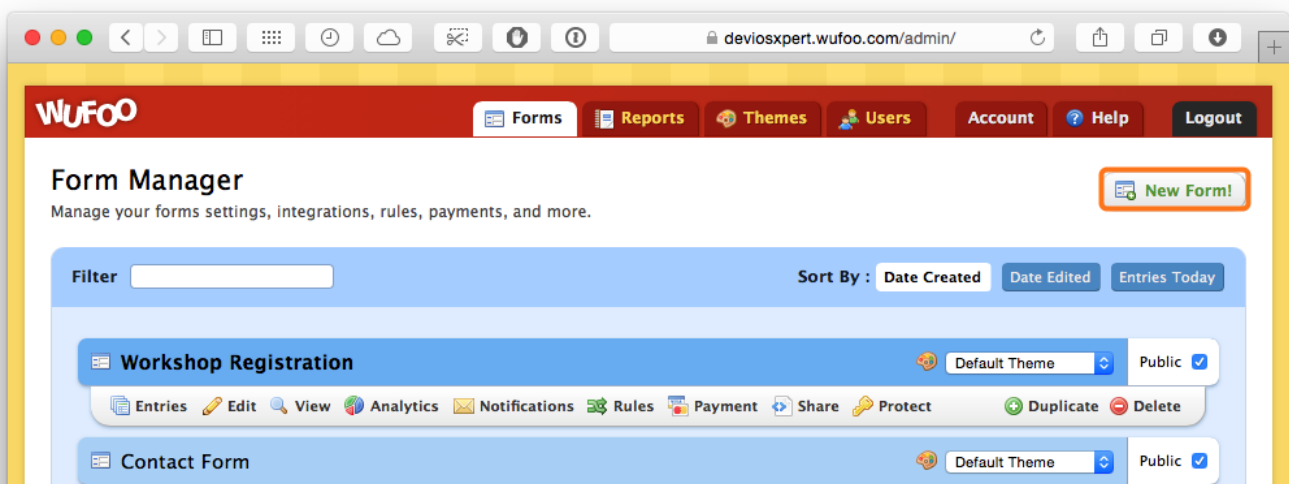
Set up API Key

Please follow these steps to get your Wufoo API key:

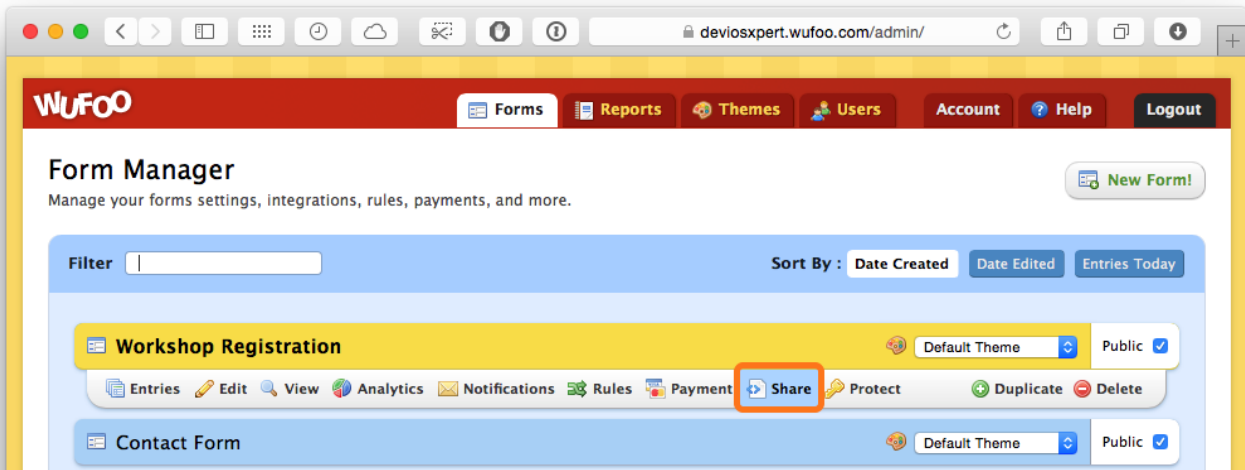
1. Log on to your account at www.wufoo.com



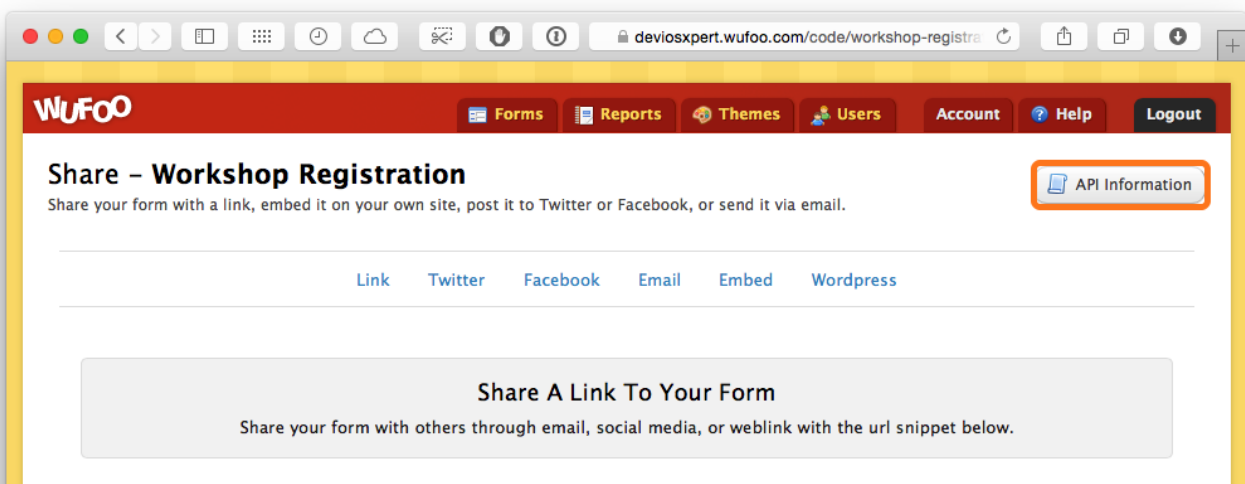
2. Created a new form if you haven't done so already



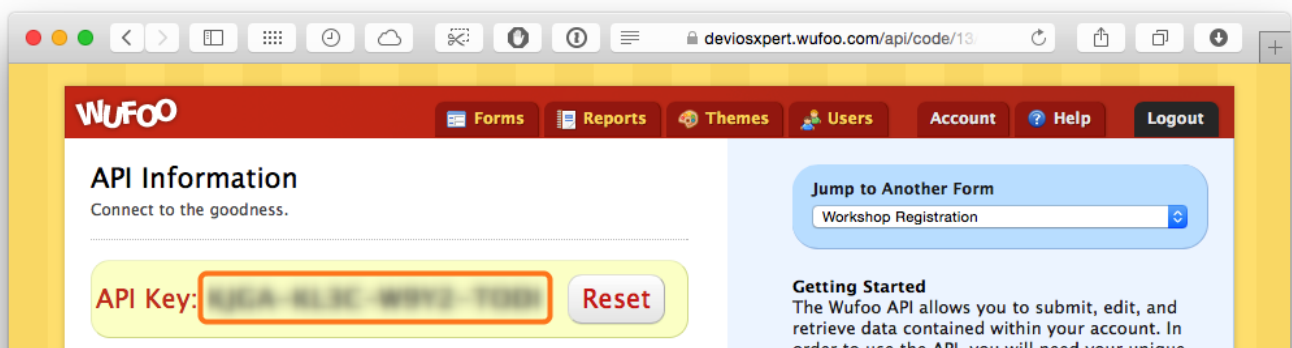
3. Select a form and click the adjacent Share button



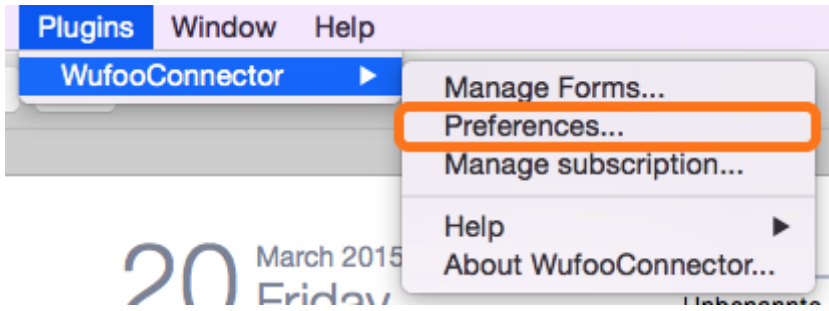
4. In the Share Page click API Information



5. Copy the API Key shown in API Information



6. In the Daylite menu paste the API Key into Plugins > WufooConnector > Preferences



Wufoo Account Settings

Account Name

Password

API Key ⓘ

credentials are valid

[Close](#)

Brief introduction in the Wufoo- Online-Form-Service

First Steps

Before using WufooConnector you'll need an account at www.wufoo.com and at least one form created there. The following steps are just a brief introduction to the Wufoo web app. For further information we refer to the Wufoo documentation at <http://help.wufoo.com>.

Create a Wufoo Account

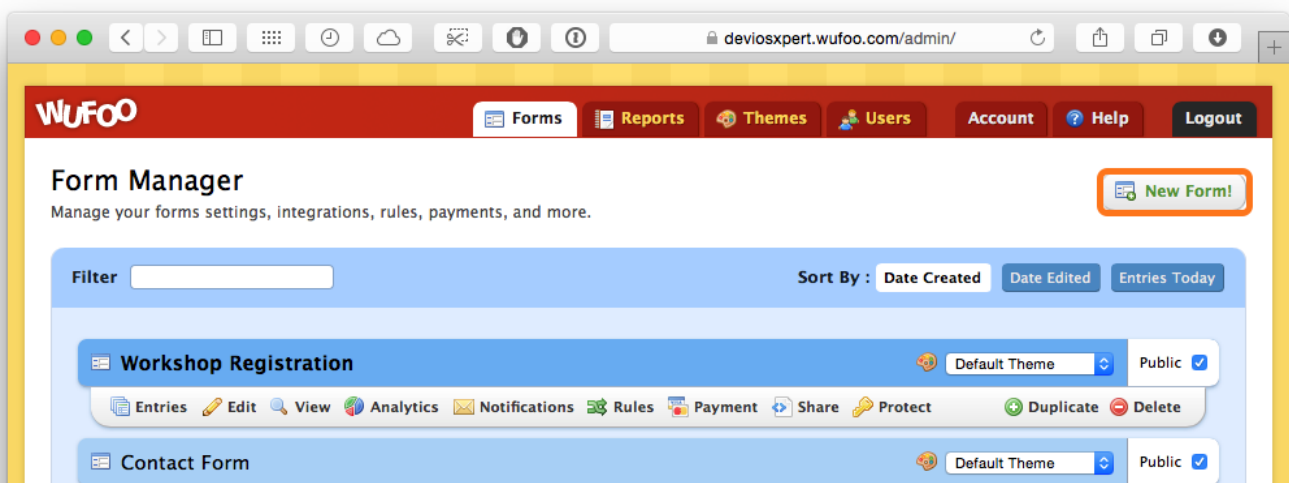
Sign up at <http://www.wufoo.com/signup/> to create an account. You'll need your Wufoo account name and the corresponding password later when configuring the WufooConnector plug-in.

Creating Wufoo Forms

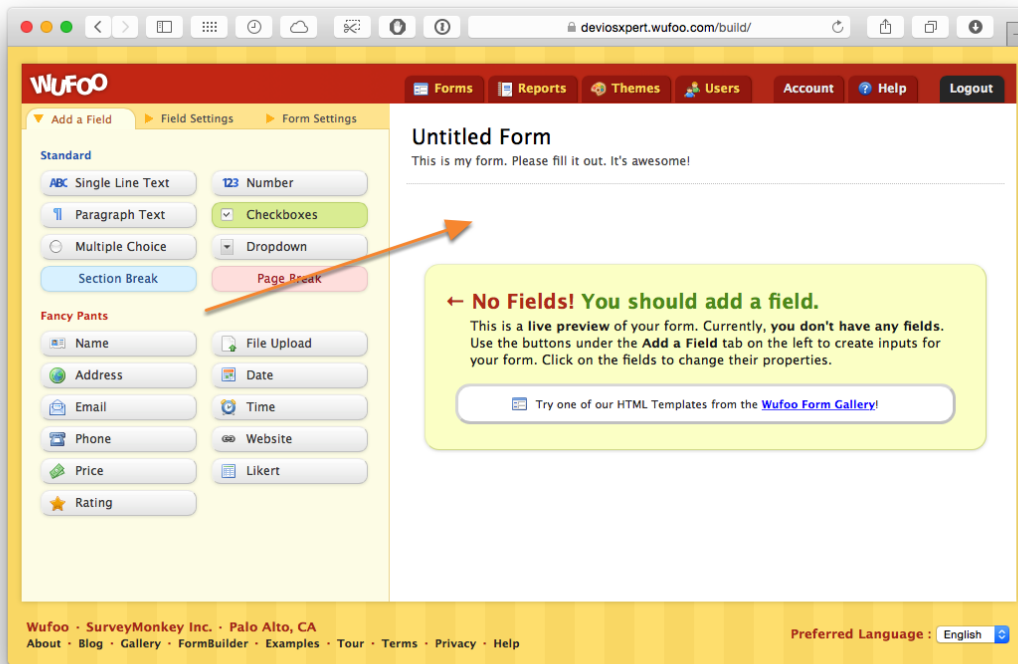
Log on to your Wufoo account at <https://secure.wufoo.com/login/> and select the Forms tab to create or edit forms. In order to use WufooConnector, you'll need at least one Wufoo form. Creating and editing of forms is being performed only on [wufoo.com](https://www.wufoo.com), not within WufooConnector itself.

When creating the first form, a so called API Key is being generated. Together with your Wufoo account name and password this API key is needed to link WufooConnector to your Wufoo account (see chapter [Set up API Key](#)).

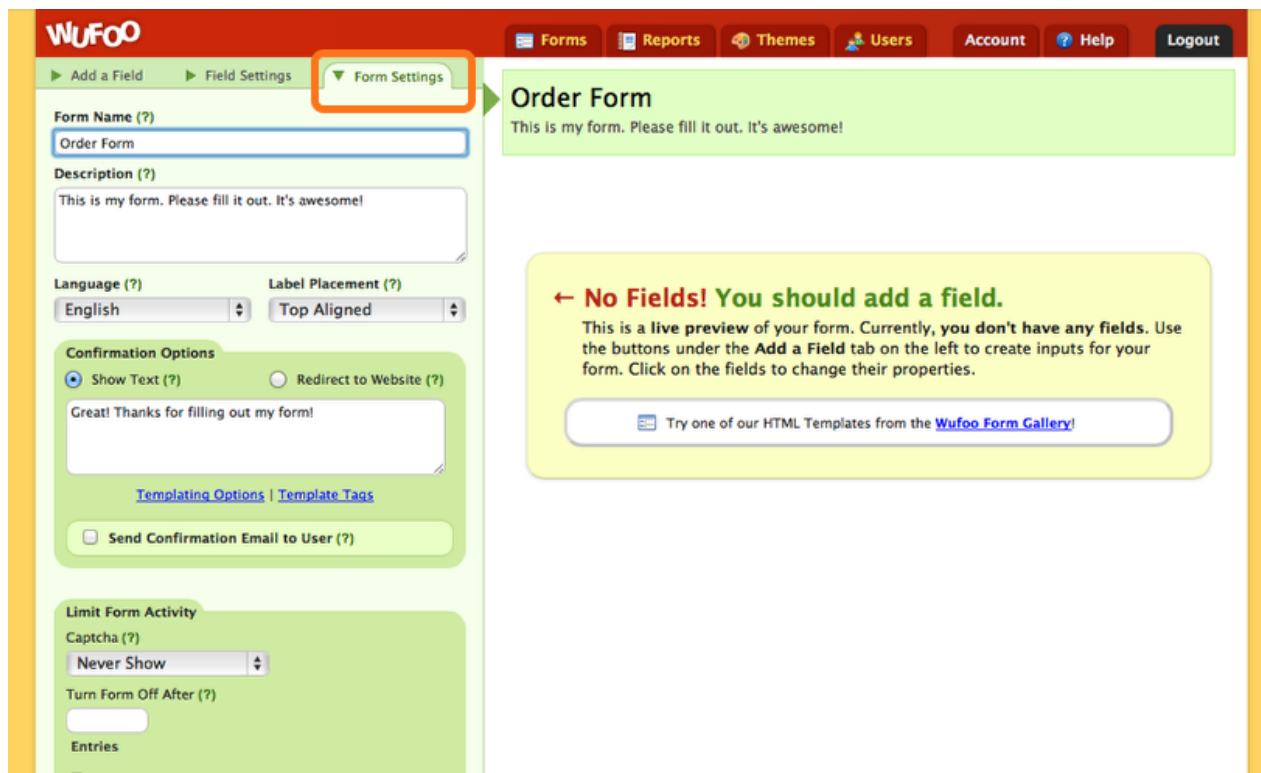
1. Select the Forms tab and click New Form!



2. Build your form by dragging and dropping appropriate fields



3. Change the name of the form under Form Settings



4. When done, click Save Form

Wufoo Forms Reports Themes Users Account Help Logout

Add a Field Field Settings Form Settings

Standard

- Single Line Text
- Number
- Paragraph Text
- Checkboxes
- Multiple Choice
- Dropdown
- Section Break
- Page Break

Fancy Pants

- Name
- File Upload
- Address
- Date
- Email
- Time
- Phone
- Website
- Price
- Likert

Order Form

This is my form. Please fill it out. It's awesome!

Name

First Last

Untitled

Email

Email

Address

Street Address

Address Line 2

City State / Province / Region

Postal / Zip Code Country

Add Field Save Form

Wufoo - SurveyMonkey Inc. - Palo Alto, CA
About - Blog - Gallery - FormBuilder - Examples - Tour - Forums - Terms - Privacy - Help

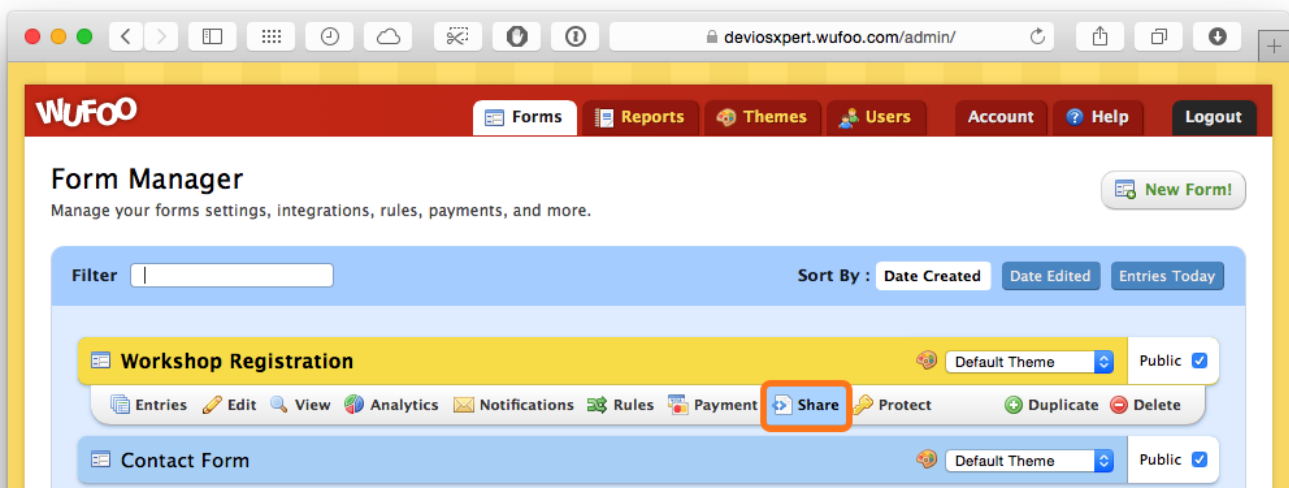
Preferred Language : English

Usage and Integration of Wufoo Forms

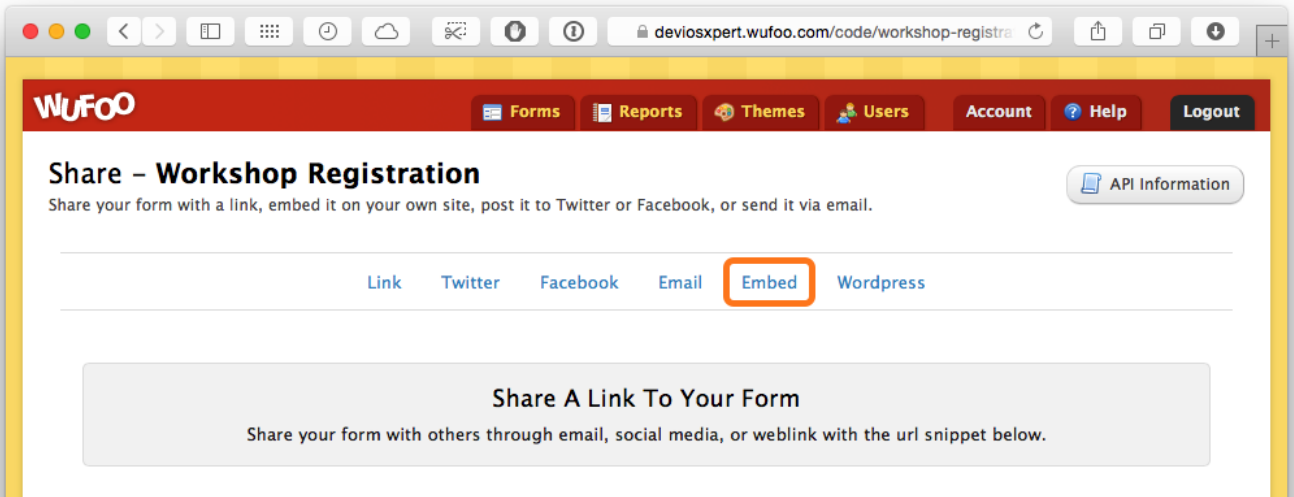
Wufoo offers different ways to use / integrate forms:

Wufoo provides a number of copy-and-paste code snippets to help you embed your form into your web site, blog post, email newsletter or Facebook page. Additionally, if you want to only use Wufoo to design your forms, we provide convenient zip files of the HTML and CSS code so you can hook it up to your own database.

1. Select the Forms tab and click Share



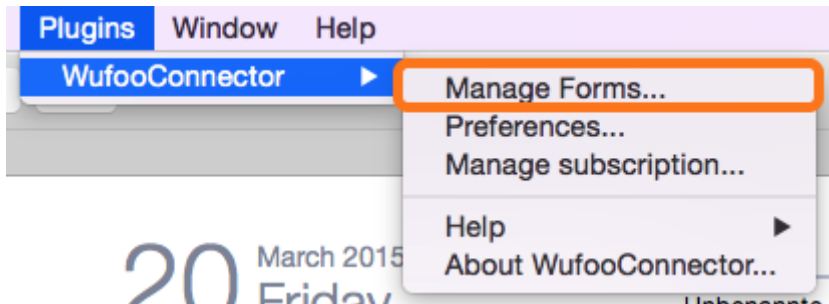
2. Click Embed to see a list of code snippets and instructions on how to embed the form in your application



Usage

Usage of WufooConnector

All WufooConnector functions reside in the Daylite plug-in menu under WufooConnector > Manage Forms



(1) Forms Table

The forms table shows all your Wufoo forms.

Use the check boxes to (de)activated the data import for the particular form.

When a form is activated, collected data is being imported into a Daylite form.

Select a form to configure its import actions

(2) Table of Import Actions

The import actions table shows all available actions for the selected form.

Use the check boxes to (de)activate an action for the selected form.

Select an action to configure it.

(3) Actions Editor

The actions editor configures the selected import actions.

(4) Use the on/off switch to (de)activate the automatic import of collected Wufoo form data

(5) Choose the time interval for the automatic import of Wufoo form data

(6) Use this button to manually import form data

(7) Enter your Wufoo login credentials and your API key

The screenshot displays the WufooConnector for Daylite interface, divided into three main sections:

- 1 Wufoo Forms:** Contains three form entries: **Product Enquiry** (last updated 3/20/15, 2:41 AM), **Contact Form** (last updated 3/20/15, 2:40 AM), and **Workshop Registration** (last updated 3/20/15, 2:39 AM).
- 2 Actions:** A list of actions with checkboxes: **Create Person** (checked), **Create Organization** (checked), **Create Task** (checked), **Create Project** (unchecked), **Create Opportunity** (checked), and **Execute Script** (unchecked).
- 3 Create Person:** A form for creating a person with fields for Name, Details (Keywords: INTEREST Consulting, Category: Customer), Addresses (not available), Email Addresses (Email checked, Work), Phone Numbers (not available), and UURLs.

At the bottom, there are controls for pulling form entries: a toggle switch (4) set to OFF, a label "Pull Form Entries every" (5), a dropdown menu set to "15 minutes", a "Pull Now" button (6), an "Account..." button (7), and a "Close" button.

Action 'Create Person'

- (1) Select which Wufoo form name field being used to create a person in Daylite
- (2) Select the Daylite keywords to be assigned to the contact
- (3) Select the Daylite category being assigned to the contact
- (4) Select the Wufoo address fields being assigned to the person
- (5) Select a Daylite label for each address
- (6) Select the Wufoo email address field being assigned to the person
- (5) Select a Daylite label for each email address
- (8) Select the Wufoo phone number field being assigned to the person
- (9) Select a Daylite label for each phone number
- (10) Select the Wufoo website fields being assigned to the person

The screenshot displays the 'Create Person' configuration interface. It is organized into three vertical panels. The left panel, 'Wufoo Forms', shows three forms: 'Product Enquiry', 'Contact Form', and 'Workshop Registration'. The middle panel, 'Actions', lists 'Create Person', 'Create Organization', 'Create Task', 'Create Project', 'Create Opportunity', and 'Execute Script'. The right panel, 'Create Person', contains the following fields with numbered callouts: 'Name' (1), 'Keywords' (2) with 'INTEREST Workshop' and '+ Add Keyword', 'Category' (3) with 'Participant', 'Addresses' (4) with 'Address' (5) set to 'Work', 'Email Addresses' (6) with 'Personal Email' (7) set to 'Home' and 'My Company's Email' set to 'Work', 'Phone Numbers' (8) with 'Phone' (9) set to 'Main Office' and 'Mobile Phone' set to 'Mobile', and 'URLs' (10) with 'Website' (11) set to 'Homepage'. At the bottom, there is a toggle for 'Pull Form Entries every 15 minutes' and a 'Close' button.

Action 'Create Company'

- (1) Select which Wufoo form name field being used to create a company in Daylite
- (2) Choose the Daylite keywords being assigned to the company
- (3) Select the Daylite category being assigned to the company
- (4) Select the industry type being assigned to the company
- (5) Choose the Wufoo address fields being assigned to the company
- (6) Select a Daylite label for each address
- (7) Choose the Wufoo email address fields being assigned to the company
- (8) Select a Daylite label for each email address
- (9) Choose the Wufoo phone number fields being assigned to the company
- (10) Select a Daylite label for each phone number
- (11) Choose the Wufoo website fields being assigned to the company as URL
- (12) Select a Daylite label for each URL

The screenshot displays the 'Create Organization' configuration interface. It is divided into three main sections:

- Wufoo Forms:** Lists three forms: 'Product Enquiry' (last updated 3/20/15, 2:41 AM), 'Contact Form' (last updated 3/20/15, 2:40 AM), and 'Workshop Registration' (last updated 3/20/15, 2:39 AM). 'Workshop Registration' is selected with a blue arrow.
- Actions:** Lists several actions: 'Create Person', 'Create Organization' (highlighted in blue), 'Create Task', 'Create Project', 'Create Opportunity', and 'Execute Script'. 'Create Organization' is selected with a blue checkmark.
- Create Organization:** The main configuration area with the following fields:
 - Name:** 'My Company's name' (1)
 - Keywords:** 'INTEREST Workshop' (2)
 - Category:** 'Customer' (3)
 - Industry:** 'Training / Coach' (4)
 - Addresses:** 'Address' (5) with label 'Work' (6)
 - Email Addresses:** 'My Company's Email' (7) with label 'Arbeit' (8)
 - Phone Numbers:** 'Phone' (9) with label 'Main Office' (10)
 - URLs:** 'Website' (11) with label 'Homepage' (12)

At the bottom, there is a toggle for 'Pull Form Entries every 15 minutes' (OFF/ON) and a 'Pull Now' button. An 'Account...' link and a 'Close' button are also visible.

Action 'Create Task'

- (1) Decide whether the task title should be the name of the form or customized title (see step (2))
- (2) Enter a customized title
- (3) Optionally select a Wufoo form field to dynamically replace occurrences of @@ in (2)
- (4) Enter the Daylite keywords being assigned to the task
- (5) Select the Daylite category being assigned to the task
- (6) Enter the due date as number of days after creation of the task (leave blank to set no due date)
- (7) Decide if the due date may be set to a weekend
- (8) Select the Daylite user to whom the created task is being delegated

The screenshot shows the 'Create Task' configuration interface. It is divided into three main sections: 'Wufoo Forms', 'Actions', and 'Create Task'.

- Wufoo Forms:** Lists three forms: 'Product Enquiry' (Last updated on 3/20/15, 2:41 AM), 'Contact Form' (Last updated on 3/20/15, 2:40 AM), and 'Workshop Registration' (Last updated on 3/20/15, 2:39 AM). The 'Workshop Registration' form is selected.
- Actions:** Lists several actions: 'Create Person', 'Create Organization', 'Create Task' (selected), 'Create Project', 'Create Opportunity', and 'Execute Script'.
- Create Task:** Contains the following fields:
 - Name:** 'Custom Title' (1), 'Registration for @@' (2), and '@@ replaced by' 'Name' (3).
 - Details:** 'Keywords' '+ Add Keyword' (4) and 'Category' 'Administration' (5).
 - Due Date:** 'Set due date to' '7' days after creation (6), with a checked box for 'Skip weekends' (7).
 - Delegation:** 'User' 'Vanessa Fuhrmann' (8).

At the bottom, there is a toggle for 'Pull Form Entries every 15 minutes' (OFF/ON) and a 'Pull Now' button. There is also an 'Account...' button and a 'Close' button.

Action 'Create Project'

- (1) Decide whether the project title should be the name of the form or a customized title (see step (2))
- (2) Enter a customized title
- (3) Optionally select a Wufoo form field to dynamically replace occurrences of @@ in (2)
- (4) Enter the Daylite keywords being assigned to the project
- (5) Select the Daylite category being assigned to the project
- (6) Select a pipeline that will be applied to the project
- (7) Select the Daylite user to whom the project will be delegated

The screenshot displays the 'Create Project' configuration interface, divided into three main sections: 'Wufoo Forms', 'Actions', and 'Create Project'.

- Wufoo Forms:** Lists three forms: 'Workshop Announcement' (last updated 3/21/15, 2:38 PM), 'Contact Form' (last updated 3/20/15, 2:40 AM), and 'Workshop Registration' (last updated 3/20/15, 2:39 AM). The 'Create Project' action is highlighted in blue.
- Actions:** A list of actions with checkboxes: 'Create Person' (checked), 'Create Organization' (checked), 'Create Task' (unchecked), 'Create Project' (checked and highlighted), 'Create Opportunity' (unchecked), and 'Execute Script' (unchecked).
- Create Project:** Configuration fields for the project:
 - Name:** 'Custom Title' (1), with a dropdown menu showing 'Summer Workshop '@@'' (2).
 - @@ replaced by:** 'Topic of the Workshop' (3).
 - Details:**
 - Keywords:** '+ Add Keyword' (4).
 - Category:** 'Workshop' (5).
 - Pipeline:** 'Workshop Management' (6).
 - Delegation:** 'User: Vanessa Fuhrmann' (7).

At the bottom, there is a toggle for 'OFF' (grey) and 'ON' (orange), a 'Pull Form Entries every 15 minutes' dropdown, a 'Pull Now' button, an 'Account...' button, and a 'Close' button.

Action 'Create Opportunity'

- (1) Decide whether the opportunity's title should be the name of the form or a customized title (see step (2))
- (2) Enter a customized title
- (3) Optionally select a Wufoo form field to dynamically replace occurrences of @@ in (2)
- (4) Enter the Daylite keywords being assigned to the opportunity
- (5) Select the Daylite category being assigned to the opportunity
- (6) Select a pipeline that will be applied to the opportunity
- (7) Select the Daylite user to whom the opportunity will be delegated

The screenshot displays the 'Create Opportunity' configuration interface, divided into three main sections: Wufoo Forms, Actions, and Create Opportunity details.

- Wufoo Forms:** Lists three forms: 'Workshop Announcement' (last updated 3/21/15, 2:38 PM), 'Contact Form' (last updated 3/20/15, 2:40 AM), and 'Workshop Registration' (last updated 3/20/15, 2:39 AM). The 'Contact Form' is highlighted in blue.
- Actions:** A list of actions with checkboxes: 'Create Person', 'Create Organization', 'Create Task', 'Create Project', 'Create Opportunity' (highlighted in blue), and 'Execute Script'.
- Create Opportunity:** A form with the following fields:
 - Name:** 'Custom Title' (1), 'Estimate for @@' (2), and '@@ replaced by' 'Company' (3).
 - Details:** 'Keywords' 'Online Sales' with '+ Add Keyword' (4), and 'Category' 'Hot' (5).
 - Pipeline:** 'Online Sales' (6).
 - Delegation:** 'User' 'Vanessa Fuhrmann' (7).

At the bottom, there is a toggle for 'Pull Form Entries every 15 minutes' (OFF/ON), a 'Pull Now' button, and an 'Account...' dropdown. A 'Close' button is in the bottom right corner.

Action 'Execute Script'

WufooConnector's functionality can be extended by a so called script. You can copy and paste a script into the text area (1).

To be able to write scripts you need the experience in developing software as well as sufficient knowledge of Daylite's architecture. If you are interested in the development of a custom script, please send an email to hallo@iosxpert.biz.

The screenshot displays the WufooConnector interface with three main panels: 'Wufoo Forms', 'Actions', and 'Execute Script'. The 'Wufoo Forms' panel lists three forms: 'Workshop Announcement' (last updated 3/21/15, 2:38 PM), 'Contact Form' (last updated 3/20/15, 2:40 AM), and 'Workshop Registration' (last updated 3/20/15, 2:39 AM). The 'Actions' panel shows a list of actions: 'Create Person', 'Create Organization', 'Create Task', 'Create Project', 'Create Opportunity', and 'Execute Script'. The 'Execute Script' panel is active, showing a text area for the script with the following content: "By adding a script you can extend the functionality of WufooConnector to your personal needs. Interested? Please send an email to hallo@iosxpert.biz! Our development team is happy to help." A red circle with the number '1' is positioned at the bottom left of the text area. Below the text area is a button labeled 'Open with external editor...'. At the bottom of the interface, there is a toggle switch for 'Pull Form Entries every 15 minutes' (set to 'ON'), a 'Pull Now' button, and an 'Account...' link. A 'Close' button is located in the bottom right corner.

The Import

The import of Wufoo-Forms can be accomplished in two different ways

1. Manual import by clicking Pull now

2. Automatic import on a regular base. For this option choose the desired time interval and put the ON-OFF-Switch to ON



What happens during an import?

- When importing a new form entries first of all a Daylite form will be created that contains all the information from the original Wufoo form.
- Depending on the selected actions the corresponding entries for persons, companies or tasks will be created and linked to each other.

Duplicate contacts

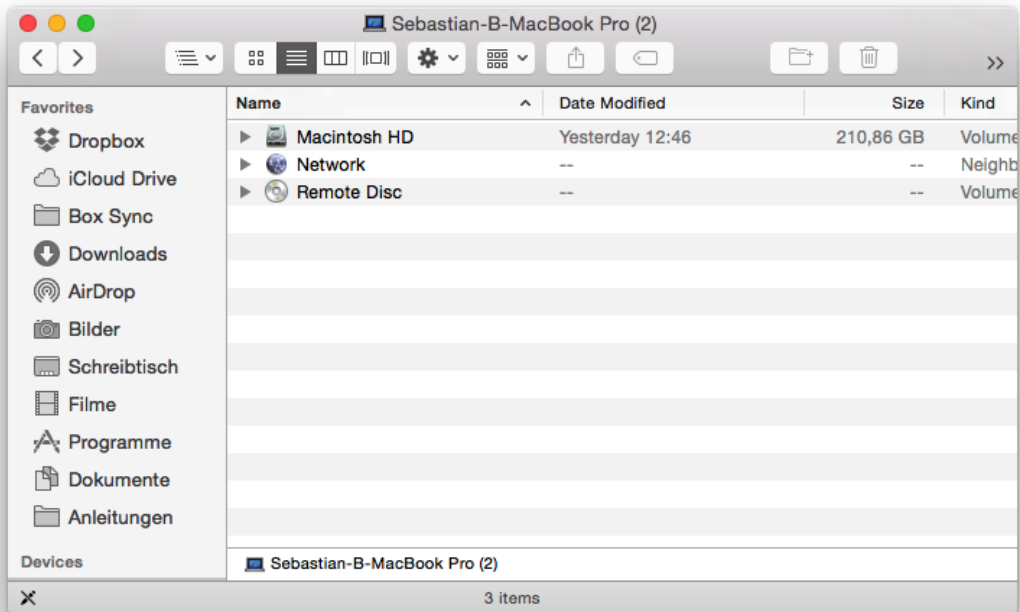
- WufooConnector can recognize duplicate Contacts.
- A person will be recognized as duplicate if first and last name and at least one email address (if available) matches the data from the Wufoo form entry.
- A company will be recognized as duplicate if the name and at least one email address (if available) matches the data from the Wufoo form entry.
- If a person or company is being recognized as duplicate, no new contact will be created. Though a new form entry will be created and linked with the existing contact. All other actions like e.g. creating a task will then be applied as well.

Other information

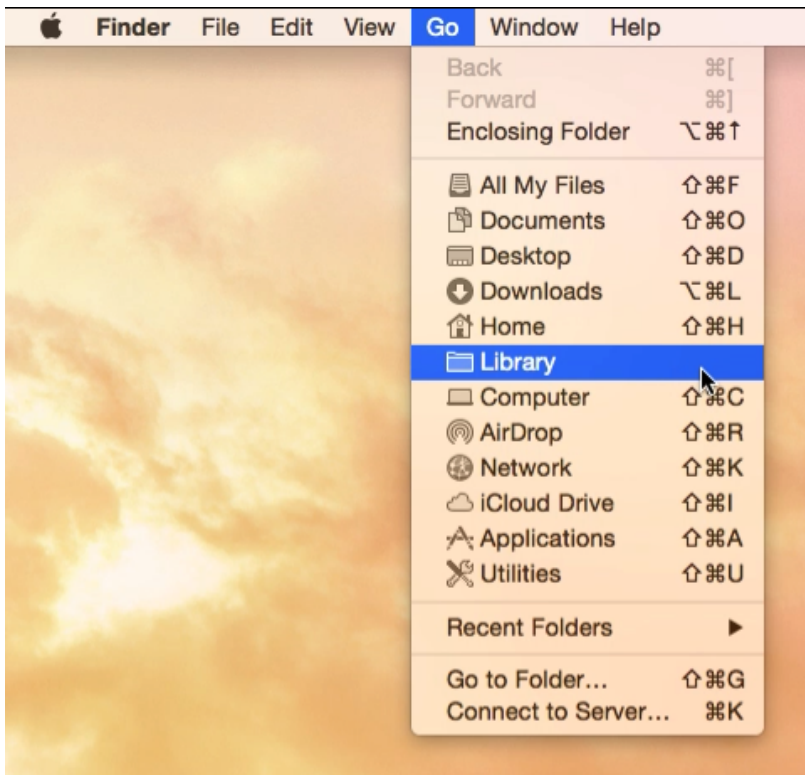
How to uninstall a plugin

In order to uninstall a plugin, please do the following steps:

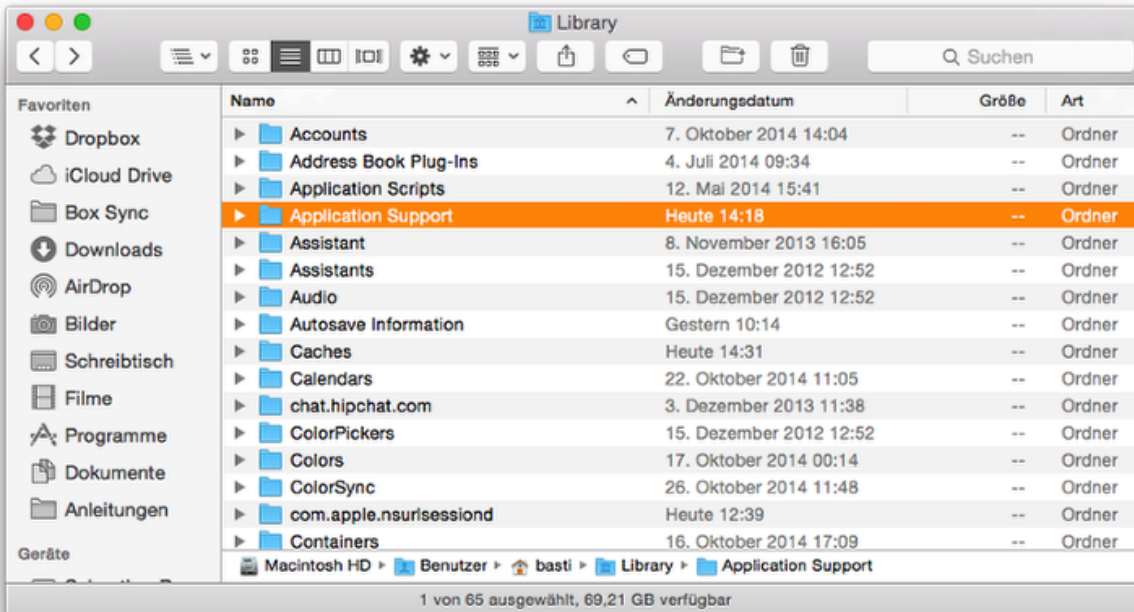
1. Open a Finder window



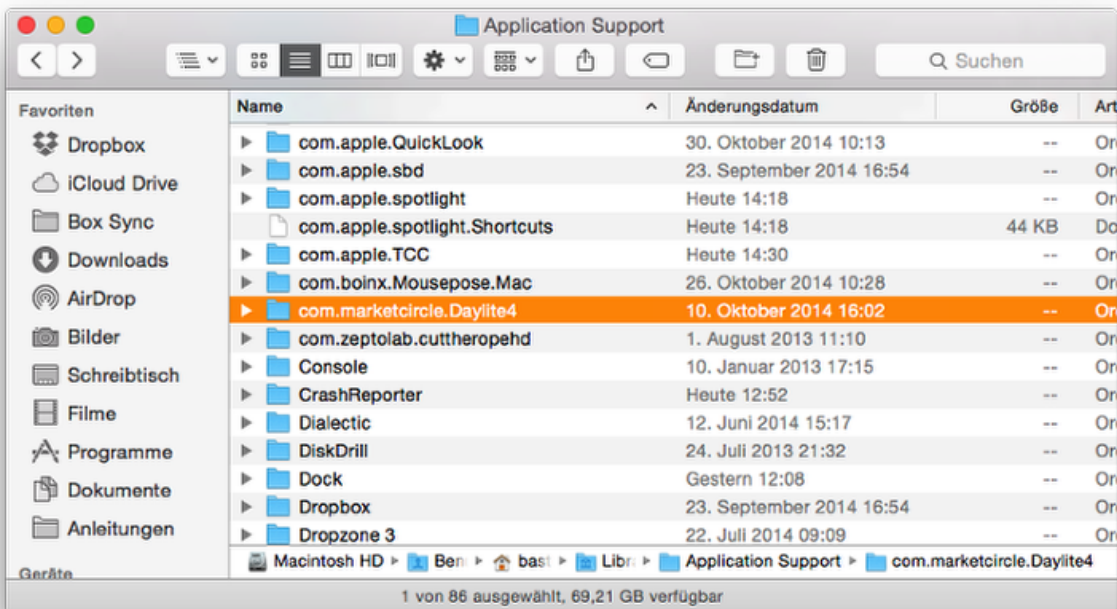
2. Click Go in the Finder menu, hold down the ⌘ [alt] key and select Library



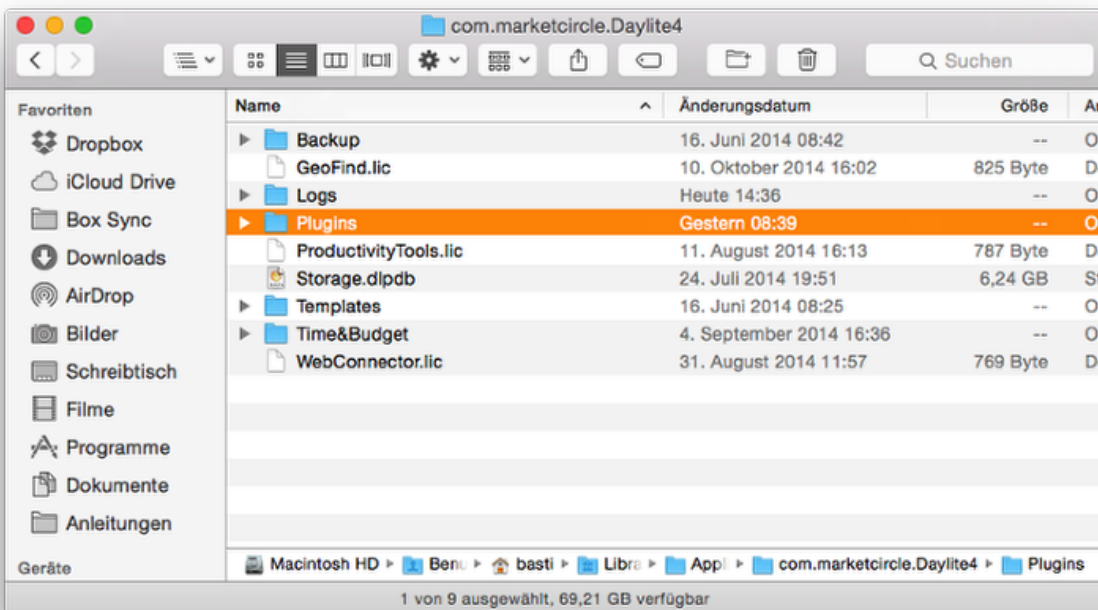
3. Navigate to Application Support



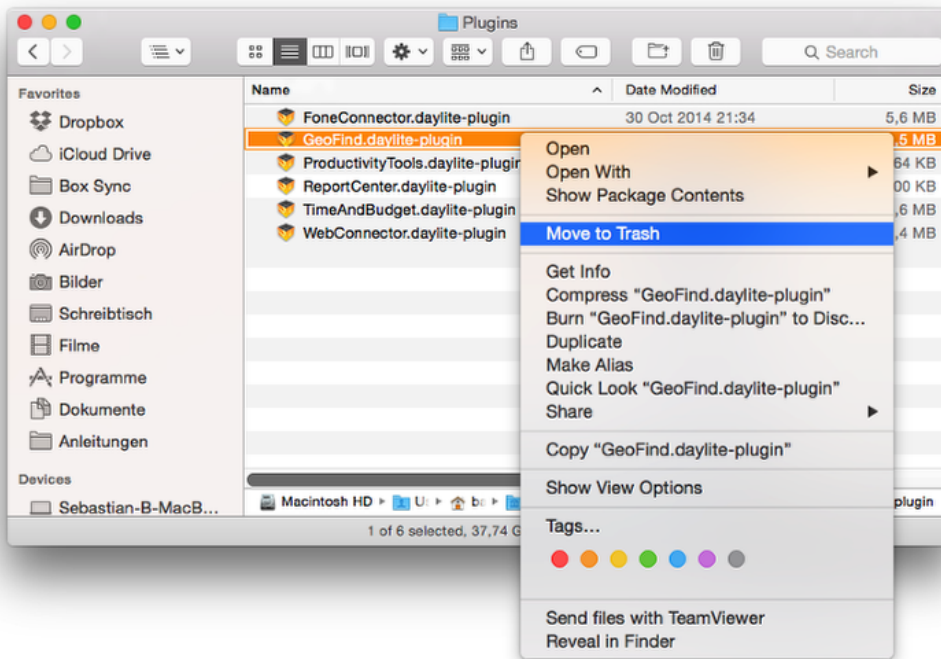
4. Navigate to com.marketcircle.Daylite4



5. Navigate to Plugins



6. Delete the appropriate plugin



7. Restart Daylite