



Web-based CRM

# Website & Email Integration Guide

Version: 1

Release: 1

Modification: 6

Tel: +44 (0)118 978 6161

Email: [support@worksIQ.com](mailto:support@worksIQ.com)

Web: [www.worksIQ.com](http://www.worksIQ.com)

## Contents

<b>1. Overview.....</b>	<b>3</b>
1.1 Tagging.....	3
<b>2. Implementation.....</b>	<b>4</b>
2.1 Tracking Code.....	4
2.1.1 jQuery.....	4
2.1.2 Snippet .....	4
2.1.3 Testing.....	5
2.2 Page Descriptions.....	6
2.3 Enquiry Forms .....	6
2.3.1 Enquiry Forms That Generate Emails.....	6
2.3.2 Standard Email Form Processing.....	7
2.3.3 Enquiry Forms that Generate Leads Directly Into WorkslQ.....	8
2.3.4 Google Adwords.....	9
2.4 General Email Processing.....	<b>Error! Bookmark not defined.</b>
2.5 System Requirements .....	9
2.5.1 User Interface.....	<b>Error! Bookmark not defined.</b>
2.5.2 Website Visitor Tracking .....	9
2.5.3 Browser Settings .....	9
2.6 Implementation Checklist .....	10

## 1. Overview

WorksIQ is a web based Customer Relationship Management (CRM) system that enables you to record the companies and contacts that you deal with and to track your sales leads and support enquiries through to completion.

WorksIQ can process emails and turn them into Contacts, Incidents or Leads within the system. If the email comes from a form on your website then WorksIQ can process the various fields in your form to automatically populate various fields within the Contact/Lead/Incident records. This saves your employees time and reduces the errors and delays caused by manually entering new data.

### 1.1 Tagging

A key feature of WorksIQ is the ability to send sales alerts to users when known contacts visit your website. The sales alerts provide value insights into the decision making processes of your sales prospects which improve the chances of winning deals and uncovering hidden sales opportunities.

The WorksIQ sales alerts are enabled by tagging the web browsers of your contact with a cookie and storing a reference to that cookie in the contact record held within WorksIQ.

A sales alert is generated when a tagged browser visits your website and the cookie stored on the visitor's browser matches a cookie reference held in the WorksIQ database.

The tagging process can be initiated by sending the contact an email containing a unique web link that is generated by the WorksIQ system. Tagging is completed when the contact clicks on the web link through to your website.

An alternate method of tagging is initiated when the contact completes an enquiry form on your website.

The tagging and alerting process requires that a snippet of code is placed on all the pages of your website. This process is described in the next chapter.

## 2. Implementation

To enable tagging please modify your website as shown below. Before proceeding we recommend you review the implementation checklist at the end of this document. If you have any questions then please contact WorksIQ support.

### 2.1 Tracking Code

#### 2.1.1 jQuery

WorksIQ uses jQuery in the tracking code. jQuery is a cross-browser JavaScript library.

If your website uses jQuery then you should check with the WorksIQ support team that your version of jQuery is compatible with WorksIQ before modifying your website.

Our snippet will determine if jQuery is available on the web page and if not will load it automatically.

#### 2.1.2 Snippet

On the website you wish to monitor, insert the following script on all pages that you wish to track.

For ease of maintenance we recommend that you place this code in a footer or master page rather than inserting it manually into each page. We also recommend that you place the code as near to the closing `</body>` tag as possible (N.B. but not after the tag), this will help ensure that the normal loading of your website is not delayed.

The **XXXXXXXX** value for `wiq_tid` shown in the code above is your WorksIQ Tenant ID and must be replaced with the relevant code for your system. You should request this value from the WorksIQ support team or your account manager.

The **yyyy** value for `wiq_consent` should be set to **true** if you have obtained consent from the website visitor that you can place cookies on their browser/device. NB. The word **true** should be written in lower case, if you write TRUE in upper case then you will see a Javascript error “Uncaught ReferenceError: TRUE is not defined”, the exact wording of the error may depend on the browser you are using. Also, quotes should not be used around the word **true** as this would make it a string not a Boolean.

If you have not obtained consent from the visitor then the value should be set to false to ensure that no cookies are written. NB. if the value of `wiq_consent` is set to false then you will not receive alerts or other data for that visitor.

NB. If `wiq_consent` has no initial value, or if the passed value is one of the following:

0, -0, null, "", false, undefined, NaN

then the object is set to **false**. For any other value it is set to **true**.

If your webpage does not contain a form and you are concerned about page size or load speed then you can remove everything below the comment “The remainder of the snippet is only required on pages with forms”.

Snippet to be inserted in your website footer:

```
<script type="text/javascript">
var wiq_consent = yyyy;
var wiq_tid = "XXXXXXX";
function initjQuery() {
    // jQuery not available
    if (typeof(jQuery) == 'undefined') {
        if (! loadjQueryOnce) {
            // Load jQuery once only
            loadjQueryOnce = true;
            // Load jQuery
            document.write("<scr" + "ipt type=\"text/javascript\"
src=\"http://www.worksiq.com/javascript/jquery.min.js\"></scr" + "ipt>");
        }
        setTimeout("initjQuery()", 50);
    } else {
        $(function() {
            // document.ready
        });
    }
}
var loadjQueryOnce = false;
initjQuery();
</script>
<script type="text/javascript"
src="https://live.worksiq.com/WorksIQTracking/Scripts/Tracking/LandingPage-1.2.4.min.js"></script>

<!--The remainder of the snippet is only required on pages with forms -->

<script type="text/javascript">
if(document.getElementsByName('cookiedata').length > 0) {
var today = new Date();
today.setTime(today.getTime());
t = new WIQ_Cookie("wiq_t", null, null, "").Load();
if (t != null) {
var base = new WIQ_BaseCookie(t);
var sessionCookie = WIQ_GetSessionCookie();
if (sessionCookie != null) {
var transportData = WIQ_GetTransportData(base.getId(), sessionCookie);
var historyVisitCookies = WIQ_GetHistoryCookies();
var visitCookie = WIQ_AddVisitCookie(base, today, true);
document.getElementsByName('cookiedata').item(0).value="data: " + transportData + ",
visitcookie: " + visitCookie + ", historyvisitcookies: " + historyVisitCookies;
WIQ_ClearHistoryCookies(0);
} } }
</script>
```

### 2.1.3 Testing

Once you have uploaded your changes please test your changes by visiting your web pages and checking to see if our cookies are written to your browser. In Google Chrome you can hit F12 to access the Developer Tools and then click on the Resources button followed by the Cookies option. You should see cookies such as “wiq\_t” that indicate that our landing page code has been called.

Finally to test the visitor alerts you should create a contact within WorksIQ and enter an email address for that contact in the email field. Next click on the email link and send the email generated to the contact. When the contact clicks through you should see an alert generated with the text “Watchbox Alert: contact tagged from email link”.

N.B. You will only receive one alert per browser session. A session might typically last 24 minutes or more even if you have closed the browser. Whilst testing you can accelerate the process by clearing down the session cookies in your browser however if you are logged into the WorksIQ system on the same machine in the same browser then this may cause you errors and log you out. Therefore we recommend that when testing on one machine that you run your tests in one browser e.g. IE and run the product in another browser e.g. Chrome.

## 2.2 Page Descriptions

If you want to tag a particular page with a meaningful description then you will need to add a hidden field with id "wiq\_p1" as shown below. The "value" supplied is used as the description i.e. "Products" in the example below.

```
<input id="wiq_p1" name="wiq_p1" type="hidden" value="Products" />
```

The location of the "<input" tag is not important though we recommend you place it as near to the closing </body> tag as possible to make it easier to find at a later date.

The "wiq\_p1" field can be used on multiple pages to help provide meaningful descriptions for a range of pages and should normally be unique for each page to avoid confusion e.g. on another page you might use the following code to represent a services page.

```
<input id="wiq_p1" name="wiq_p1" type="hidden" value="Services" />
```

The "wiq\_p1" field is particularly useful when your web pages are built dynamically rather than being a simple URL like "products.html".

## 2.3 Enquiry Forms

Any forms on your website should be modified to pass information over to WorksIQ. The modification will depend on how your form operates. The two main methods are:

- Your form generates an email that WorksIQ processes
- Your form generates a lead directly into WorksIQ

The modifications required are described below.

### 2.3.1 Enquiry Forms That Generate Emails

If your enquiry form generates an email then the email should be sent or forwarded to a mailbox that WorksIQ is monitoring. For testing purposes Cirra Technologies can setup a temporary email address that you can forward your emails to if required.

To enable the automatic tagging of the new contact the form itself should be modified so that the visitor's cookie data is written into the outgoing email along with the other details entered into the form. The normal mechanism for doing this is to add a hidden field into the form which WorksIQ subsequently overwrites. The value of the hidden field should be written to the outgoing email along with the other fields but preferably not as the last field in the email.

In HTML the hidden field in your form would look like the following:

```
<input type="hidden" name="cookiedata" value="" />
```

Most Content Management Systems (CMS) will allow you to enter a hidden field and include it in the outgoing email.

The snippet added to the page in section 2.1.2 above contained a section of code which writes the cookie data to the hidden field in the form.

N.B. The snippet looks for an <INPUT> tag on your webpage with the parameter *name="cookiedata"* if it is not present then the form should be modified to include the parameter. If it is present but it is identified by the parameter *id="cookiedata"* then the snippet should be modified on two lines:

```
        if(document.getElementById('cookiedata')!=null) {  
and  
                document.getElementById('cookiedata').value="data: " + transportData + ", visitcookie:  
" + visitCookie + ", historyvisitcookies: " + historyVisitCookies;
```

If this situation arises then please call WorksIQ support for a revised snippet.

### 2.3.2 Standard Email Form Processing

As part of the customisation services offered by Cirra Technologies, WorksIQ can be tailored to process a wide range of email layouts to match the forms used on your website.

Out of the box, WorksIQ will process an email according to the formatting rules in the Inbound Email Processing Specification see: <http://www.worksiq.com/support/creating-leads-from-emails/>

The following email format should be sufficient for a proof of concept at the evaluation stage:

WorksIQFormatted

Lead: 1

Contact: 1

FirstName: John

LastName: Doe

Email: john@doe.com

LeadDescription:This is a test lead created by email

-----

LeadTitle: Test Lead

LeadStatus: 50

#### *Multi Line Fields*

A multi line field such as Message, Description or the worksiq cookiedata should be terminated either by a new line containing 5 hyphens (-----) or another field (e.g. Telephone:). Without a terminator the system will continue to read the email until the end of the file and in so doing may append signatures, disclaimers etc to your records.

#### *Matching Contacts*

When then email has come from a form the following rules apply:

If cookiedata is provided and it matches an existing contact then the Lead will be assigned to that contact and the existing contact details will be used to populate the Lead record. The actual details provided will still be available via a history record which contains a copy of the original email.

If no cookie data is provided then the form is treated as being from an entirely new contact.

### 2.3.3 Enquiry Forms that Generate Leads Directly Into WorksIQ (BETA)

If you wish to generate enquiries directly into WorksIQ rather than via an email then the following mechanism should be used. If you wish to use this process please call WorksIQ support so that your account can be enabled.

The following script should be inserted on pages containing the forms. The script should be inserted after the snippet in section 2.1.2 above.

```
<script type="text/javascript"
function informationSubmitted() {
    // send information request to wiq server
    var contact = new WIQ_Contact($('#FirstName').val(),
                                   $('#Surname').val(),
                                   $('#Company').val(),
                                   $('#Phone').val(),
                                   $('#Email').val(),
                                   $('#Notes').val());

    WIQ_NotifyInformationRequest(contact);
}
</script>
```

The script above should be modified so that the “#” values tie up with the <INPUT> tags in your form i.e. if you have the following in your <FORM> element

```
<input type="text" size="25" name="forename" id="forename" value="">
```

Then the line in the script should be amended as shown below:

```
var contact = new WIQ_Contact($('#forename').val(),
```

N.B. The “#” value should tie up with the “id=” value in your form.

Finally you should modify the submit button in your form to invoke the script above when the user completes the form and hits enter. This can be achieved by adding the “onclick” attribute as shown to the <INPUT> tag.

```
<input id="submitbutton" type="submit" value="Submit" onclick="informationSubmitted()"
/>
```

### 2.3.4 Google Adwords

To enable WorkslQ to automatically identify which search engine queries have come from Google Adwords as opposed to organic search results you should enable Auto Tagging in your Adwords account preferences.

The effect of Auto Tagging is to put a &gclid parameter in the query string of the landing page that links your advert to your website.

The best way to do this is by linking your Google Adwords and Google Analytics accounts. Please speak to our support team if you need assistance with this.

Alternatively you can do it manually as follows:

To enable/disable auto-tagging:

Sign in to your AdWords account at <http://adwords.google.co.uk>.

Click the My Account tab and select Account Preferences.

In the Analytics section, click Edit.

Modify the Destination URL Auto-tagging checkbox.

Click 'Save changes'.

If Auto Tagging is not appropriate for your website then please speak to our support team to discuss a suitable workaround.

For more details please see: <http://support.google.com/adwords/bin/answer.py?hl=en-GB&answer=55590>

## 2.5 System Requirements

### 2.5.2 Website Visitor Tracking

WorkslQ is designed to operate with all currently supported versions of the mainstream web browsers.

### 2.5.3 Browser Settings

For WorkslQ user interface and website visitor tracking to operate correctly you must have Javascript enabled on your web browser and you must allow cookies to be written to your device.

## 2.6 Implementation Checklist

1. Insert tracking code snippet into the footer of each page
2. Verify there are no errors on your webpage (e.g. hit F12 in Chrome to access the Developer Tools and click on the Console button in the Developer Tools to view any errors)
3. Test tracking code snippet by sending a tagging email to a colleague
4. Cirra to setup test mailbox to forward email enquiries to

OR

Provide Cirra with mailbox details to monitor directly

5. Test conversion of basic email into a new lead
6. Provide Cirra with sample email from your contact form
7. Cirra to setup processing rules for contact form enquiries
8. Test processing of contact form enquiries
9. Test processing of contact form enquiries and subsequent visitor tracking