Mautic – Pipedrive Plugin

## Introduction:

**Mautic[1]:** Open source CRM with easy to work interface and extremly customizable code(see docs[2] for customization flexiblity), created in Symfony framework(PHP).

**Pipedrive[3]:** Sales Management Application to manage, leads and activities associated with those leads.

**Pipedrive Plugin:** This plugin acts as a bridge between Mautic and Pipedrive. Using this plugins leads are exported to Pipedrive and activities are created, also it provides ways to sync contacts from PD to Mautic.

## Why we created it ?

We use Mautic for our marketting campaign and Pipedrive to contact the leads generated from those campaigns, we needed a way through which we could check mautic point thrashhold and identify leads which could then be exported to PD for our call center people to contact them. So we created this plugin, it tracks any point change and sends the lead crossing a point thrashhold to PD.

## Version:

1.0.0.

## Installation:

1. place PluginBundle directory in the plugins directory of your mautic installation.

e.g. Linux: ~your-mautic/plugins/PipedriveBundle

2. go to console, clear mautic cache

~your-mautic/app$ php console cache:clear

3. Go to plugins In Mautic

4. Click Install new plugins, Any new plugin(or new version) will be installed. In this case Pipedrive Plugin. You will see Pipedrive menu at the left. This is only to keep track of leads which were exported to PD.

5. Set Up Webhook for point change. Use http(s)://www.your-mautic-url/pipedrive/person as webhook URL.

After this setup, There need some doing in the Code, It doesn't need much of knowledge, if you have very basic knowledge that would be good enough, we try to write following content in a way that you don't face any problem customizing as per your requirements.

## File Structure: PipedriveBundle(/)

Config – Plugin Config file(no need to mess with it untill you know about mautic plugin development)

Controller - Plugin Controller File, Main File

Command – Cron Command Files

PipedriveNewsletterCommand  
 PipedriveEmailSyncCommand

Entity

Database related files

Views

View/UI related files

Benhawker – Pipedrive API Files(No need to do anything here)

## General Mautic Field Preconfigured:

Id – default

points – default

firstname – default

lastname – default

email – default

phone – default

salutation – default

newsletter – custom(professional) – need for tracking if newsletter subscribed by contact

company – default

address1 – default

city – default

zipcode – default

country – default

note – custom(core type)

## Pipedrive Fields:

firstName – obtain field hashcode

lastName – obtain field hashcode

name – default(comibnition of “lastName, firstName”)

email

phone

salutation – obtain hashcode

address – obtain hashcode

mautic\_id – custom – create and obtain hash code

newsletter – custom – obtain hashcode(values: Ja, Nein)

sendEmail – custom – obtain hashcode(Ja or Okay)

## What to Configure:

**Controller -> PipedriveController**

In the Controller class at the top are three constants which are required as per your needs, replace default

**const *THRASHHOLD\_POINTS*** = 7;

Thrash hold points are limits which if crossed contact would be exported to Pipedrive.

**const *PIPEDRIVEKEY*** = **"****xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx"**;

The Pipedrive API key[4] required to connect to Pipedrive.

**const *PIPEDRIVE\_OWNER\_ID*** = 392127; *//your your id in pipedrive which becomes owner of person, org, activity*

*Your Owner ID in Pipedrive to whom assign the Person, Organization and Activity created through Plugin.*

Also if you have More custom field in Pipedrive or Mautic to map together refer code documentation in the code file.

**Command –> PipedriveNewsletter**

**const *FILTER\_ID*** = 20; *//ID of PIPEDRIVE Filter*

*Id of the filter Check section below to know how to obtain this Id*

**const *PD\_KEY*** = **"xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx"**;

The Pipedrive API key[4] required to connect to Pipedrive

If you are making changes in this section you will also need to make mapping modification in Model/PipedriveModel for the mapping of the fields(you will find code documentation in the file).

**Command -> PipedriveEmailSync**

**const *FILTER\_ID*** = 20; *//ID of PIPEDRIVE Filter*

*Id of the filter Check section below to know how to obtain this Id*

**const *PD\_KEY*** = **"xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx"**;

The Pipedrive API key[4] required to connect to Pipedrive

**const *PD\_EMAIL\_OK\_FIELD*** = **"f78f68e3008b2cdd3297328ca727e38535e0a3dc"**;

The custom Email field as mentioned in required field, place its hashcode here.

**const *PD\_MAUTIC\_ID\_FIELD*** = **"9bc9b85f8073812eeeb2519850b11499292b1afe"**;

the custom mautic id field as mentioned in required field, plece its code here.

**const *LIST\_ID*** = 44; *//list id in Mautic in which to put contact from PD*

Id of the List in Mautic, which will hold these Email contacts. Which are set to send email, through pipedrive.

When to Use Newsletter Cron?

**Command:**

pipedrive:newsletter:sync

this cron ought to be used when you want to set some lead in Pipedrive and have to use that Lead to add that contact in mautic for sending out newsletter. You need to create a filter and configure Plugin to use this filter, see section above for the same.

When to use Email Sync Cron ?

**Command:**

Pipedrive:email:sync

First set a custom field as mentioned in the sections above and use its Id to configure the plugin. This is there if you want to collect this lead in the Mautic List for some specific email sending.

## How to obtain Hashcode for fields and Filter Id for Crons?

1. While you create the field you will get it at the time of generation.

2. If you want to get field hashcode and multi option value Id, go to specific person, on the left you will find the fields, press F12 on your keyboard, Developer Option will open up. User selector to select and click the field on screen for which you want to see the hashcode. Once you do, you will see the hashcode for corresponding field, if it is multi select type, you select that option and you will find option value in the developer window.

3. To find Filter Id, if you didn't get at the time of generation, Go to Contact Listing, on the right top you will find User Filter and other filter dropdown menu. Click it once. Press F12 to open developer console, user Selector to choose your filter, there you will find the Filter Id.

## Please Note:

This Documentation, assumes you have at least basic knowledge about Mautic and Pipedrive and little bit of code. If any problem arises feel free to contact us, In future we will try to make it more user friendly.

## **Web References:**

1. <https://www.mautic.org/>

2. <https://developer.mautic.org/>

3. [https://www.pipedrive.com](https://www.pipedrive.com/)

4. <https://www.pipedrive.com/en/api>