

TURBODIAL

Fields & Script: Juan Dough

turbodial.biz/tf/biz/telfusion/infusionsoft/ScriptPop.php?params=LcAiaUDtm6Py%2Bil8...

Additional Fields

Contact Fields	
Contact: Juan Dough Leadsource:	
Anniversary	20191231T00:00:00
Birthday	19900101T00:00:00
Company	FBI
JobTitle	Duke of Windsor
TimeZone	America/Phoenix
MembershipType	Vibranium
Goals	Lose weight Eat cookies Eat healthy Skydive Breakdance
Budget	10000
ReferredBy	Jeff Bezos
LastContactedDate	Dec 10 2019 12:15 AM MST
Opportunity: FBI Stage: Working	
DateCreated	Dec 13 2019 3:56 PM MST
MonthlyRevenue	0
NextActionDate	Dec 31 2019 12:00 AM MST
ProjectedRevenueHigh	15000
ProjectedRevenueLow	50000
ofUnits	100

- Setup -
Additional
Fields

Additional Fields

- The purpose of the **Additional Fields** feature is to let you see Contact and Opportunity information you wouldn't otherwise have access to from within turboDial.
- **Up to 5 each:**
 - Standard Contact fields
 - Custom Contact Fields
 - Standard Opportunity Fields
 - Custom Opportunity Fields

Initial Steps

- Login to turboDial Management Account:
<https://sd123.customerhub.net/>
- Hover over **TurboDial Setup**
- Choose **Display Additional Infusionsoft Fields**
- Click the **Choose Infusionsoft Fields** button.

Choosing *Standard Fields*

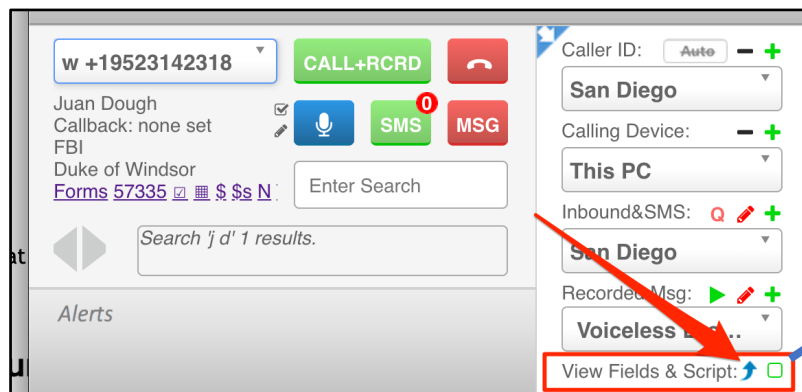
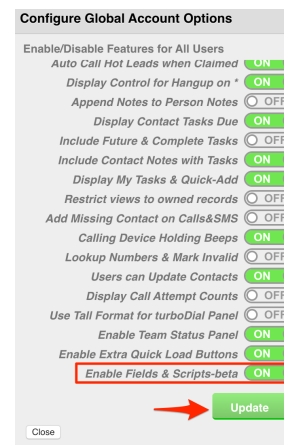
- To find the database names for **standard** Contact or Opportunity fields, go here:
<https://developer.infusionsoft.com/docs/table-schema/>
- The **Contact** table displays database names of ***Contact*** fields.
- The **Lead** table displays database names of ***Opportunity*** fields.

Choosing *Custom Fields*

- To find the database names for **custom** Contact or Opportunity fields, go here:
<https://help.infusionsoft.com/help/backend-database-names-for-custom-fields>
- Follow instructions on Infusionsoft article.

Final Steps and Testing

- After choosing the fields you want, at the bottom of the page enter your turboDial Management Account info then click **Install Fields**.
- Make sure this feature is enabled in **Global Options**. -----
→
- Next, focus your turboDial panel on a Contact then click the blue up-arrow icon next to **View Fields & Script**:
- If it worked, you should see a popup similar to the righthand image below:



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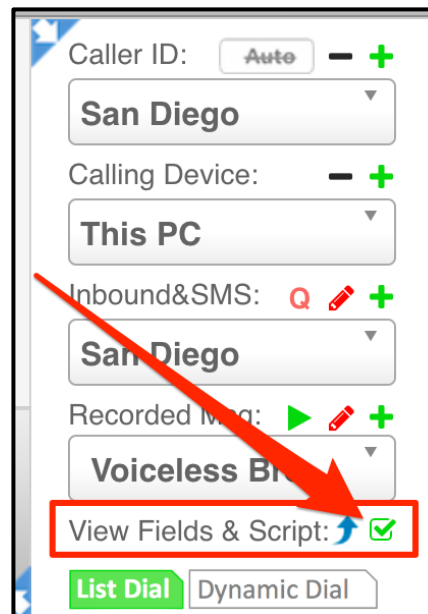
turbodial.biz/ff/biz/telfusion/infusionsof/ScriptPop.php?params=LcAiaUDtm6P/y%2Bll8...

Additional Fields

Contact Fields		Contact: Juan Dough	Leadsource:
Contact fields	Anniversary	20191231T00:00:00	
	Birthday	19900101T00:00:00	
	Company	FBI	
	JobTitle	Duke of Windsor	
	TimeZone	America/Phoenix	
	MembershipType	Vibranium	
	Goals	Lose weight Eat cookies Eat healthy Skydive Breakdance	
	Budget	10000	
	ReferredBy	Jeff Bezos	
	LastContactedDate	Dec 10 2019 12:15 AM MST	
Opportunity: FBI		Stage: Working	
Opportunity fields	DateCreated	Dec 13 2019 3:56 PM MST	
	MonthlyRevenue	0	
	NextActionDate	Dec 31 2019 12:00 AM MST	
	ProjectedRevenueHigh	15000	
	ProjectedRevenueLow ofUnits	50000 100	

Tip

- If you want the Additional Fields pop up to automatically appear each time turboDial is set to a Contact, please check the box next to **View Fields & Script**:



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Contact: Juan Dough Leadsource:	
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	Birthday 19900101T00:00:00
	Company FBI
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	ofUnits 100

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Thanks for learning about Additional Fields!