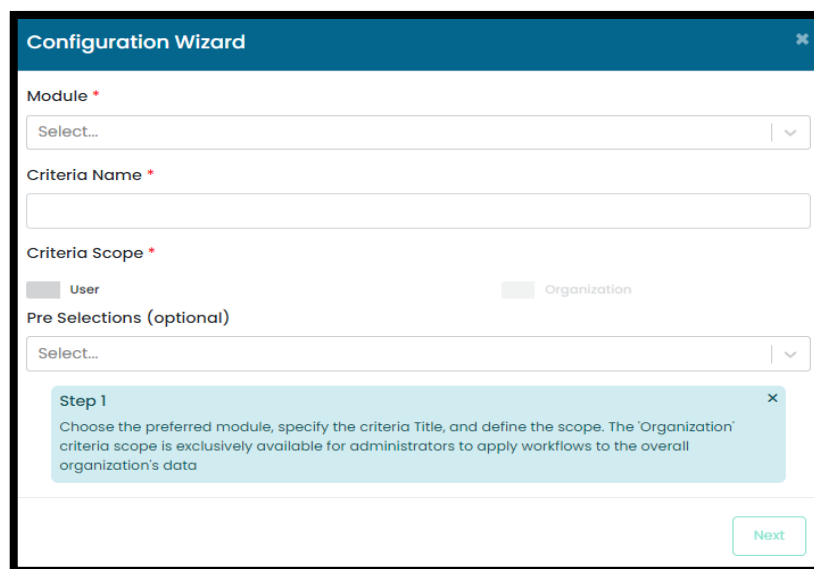# Place Match

Extension for Zoho CRM

Place Match is a Zoho CRM extension where you can create and customize workflows based on your data's geographical location. Place Match is a powerful platform that revolutionizes data-driven workflows by harnessing the potential of geographical information. With Place Match, you can effortlessly customize and optimize your processes based on precise geographical data. Whether you need to streamline logistics, enhance marketing strategies, or make data-driven decisions. Unleash the full potential of your data with Place Match and unlock new possibilities for efficiency and success.

Create Criteria:

Hit this button at the top right corner to design and customize workflow sequences to streamline your processes. A form like below will appear where the user needs to select a specific module to apply the workflow to the records of the selected module, then specify a unique name for the criteria to identify.

Criteria Scope:

Defined boundaries for specific data. User or Organization based. User based scope only works for the user specific data. Organization based scopes works for allover organizations data but it requires administration level access to apply workflows on organizations data.

Pre-Selection:

Place Match allows you to select from the pre-defined criteria's in the dropdown according to your own need. There could be the 4 possibilities while creating specific criteria for workflow as follow:
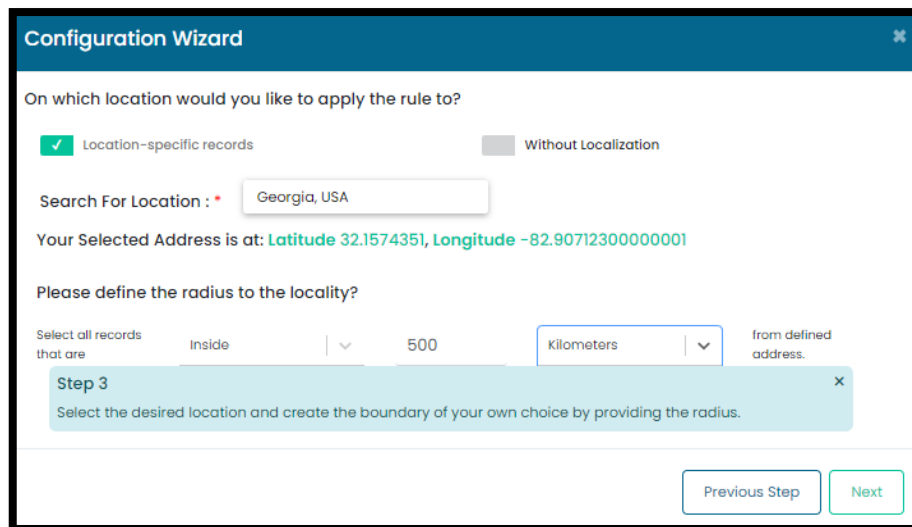

1- All contacts with localization

Define workflow criteria for all contacts with a specific geographical location. Specify a location through search to add a pin point. Then, select the records as inside/outside of the selected latitude and longitude. Add the radius and select the parameters as in km or miles.
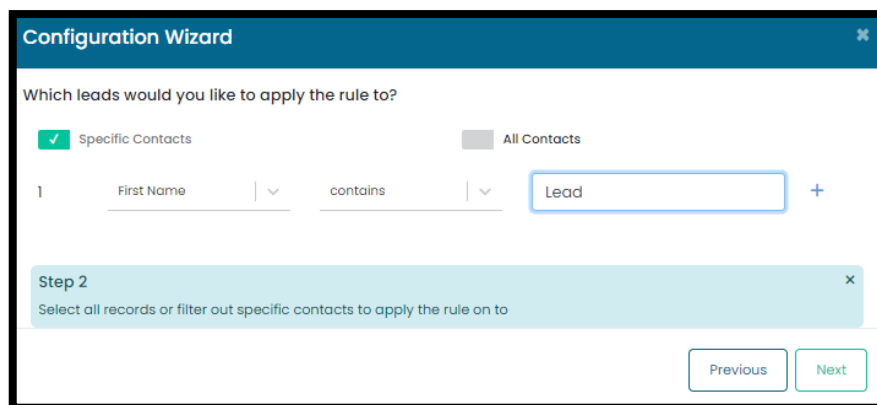
2- All Contacts without localization

Define a workflow criteria for all the contacts without defining a specific area or radius. It includes all the data from the selected module.
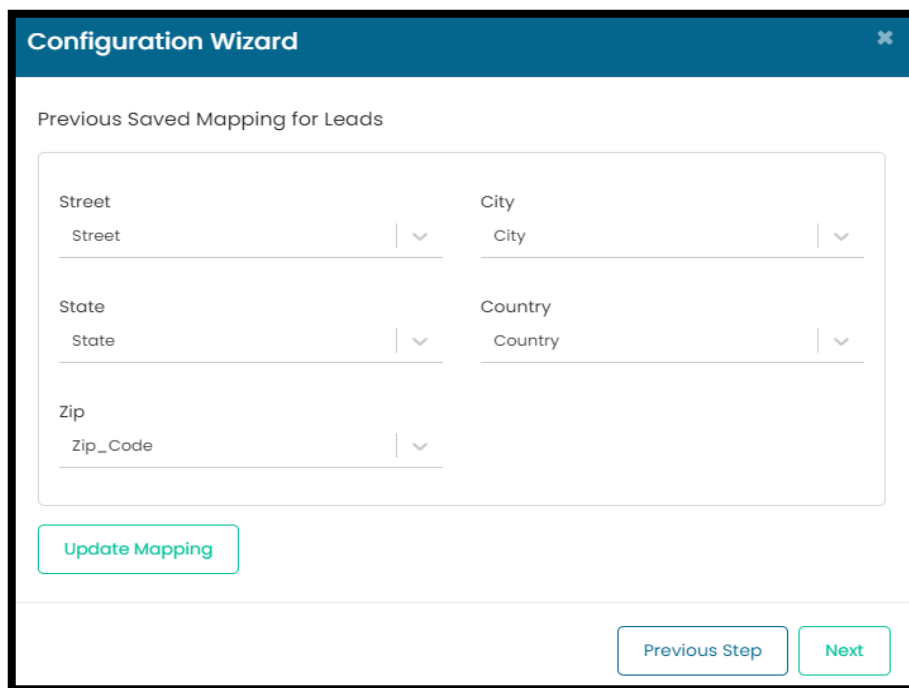
3- Specific contacts with localization

Specific contacts with localization are those records where the criteria is applied to the contacts against a specific value and a specified radius for the geographical location of the data. Specify contacts by filtering them provide any field specific criteria.

4- Specific contacts without localization

Specific contacts without localization are those records/ contacts where the criteria is applied to the contacts against a specific without considering their geographical location.

Mapping:

Map your location fields here in the mapping screen for the place match to get the latitude and longitude to get their geographical locations for applying workflows to only the specified data. You can easily map you customized fields here too but be aware that if your mapped fields does not contain any address information mapping is not going to work and the workflow won't be applied to data where localization is necessary.
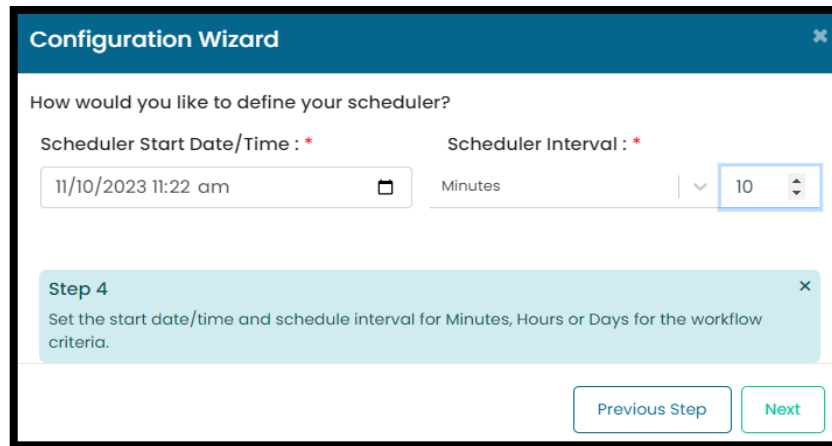
Scheduler start date /time:
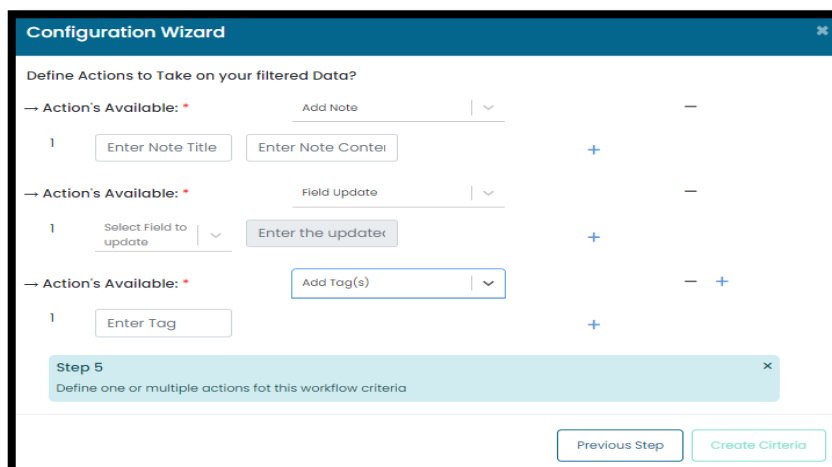
Specify the date and time to trigger workflow accordingly. The interval type specifies the time periods based on your criteria to trigger workflow after minute, hours or days.
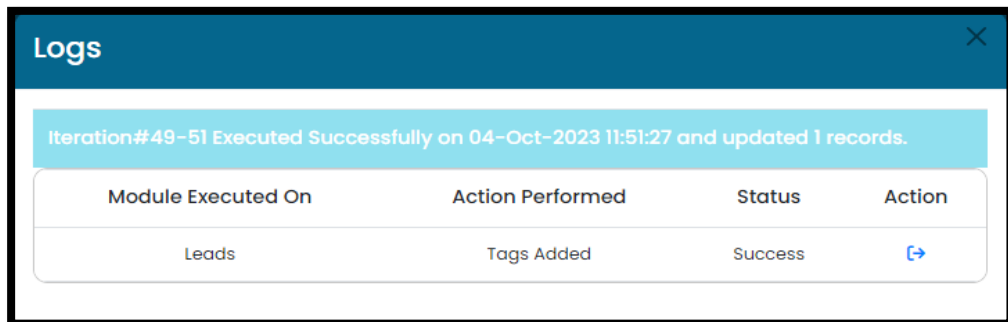

Define actions:

There are possibly 4 actions that you can perform. Add note, Field Update, Add Tag(s) or assign Owner. According to the interval the actions will be triggered after each interval time that you have selected in the previous step.
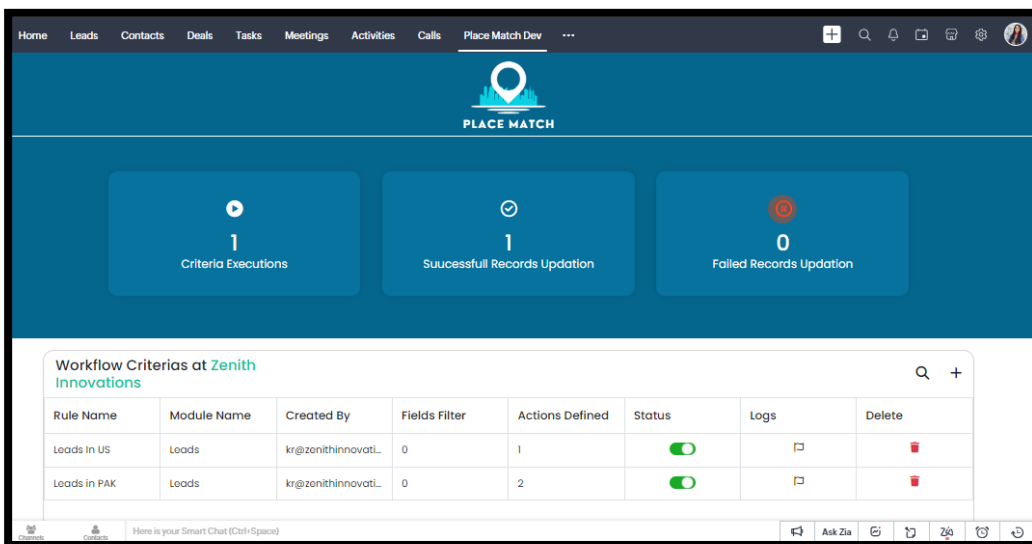
Status/ Logs:

User can easily turn off or turn on the workflow according to the need. Just toggle the status button. User can also delete and see the logs too that how many times the workflow is triggered or executed.

In case of any problem in setting up, feel free to contact us at:

info@zenithinnovations.net