



Place Match

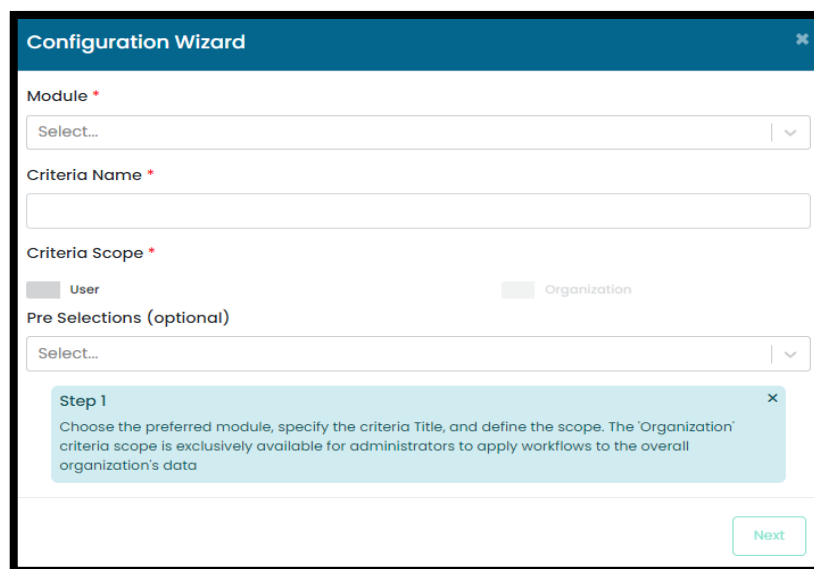
Extension for Zoho CRM

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.

Rule Name	Module Name	Created By	Fields Filter	Actions Defined	Status	Logs	Delete
Leads In pak	Leads	kr@zenithinn...	0	1	<input checked="" type="checkbox"/>		

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.



The screenshot shows a 'Configuration Wizard' window with the following fields and options:

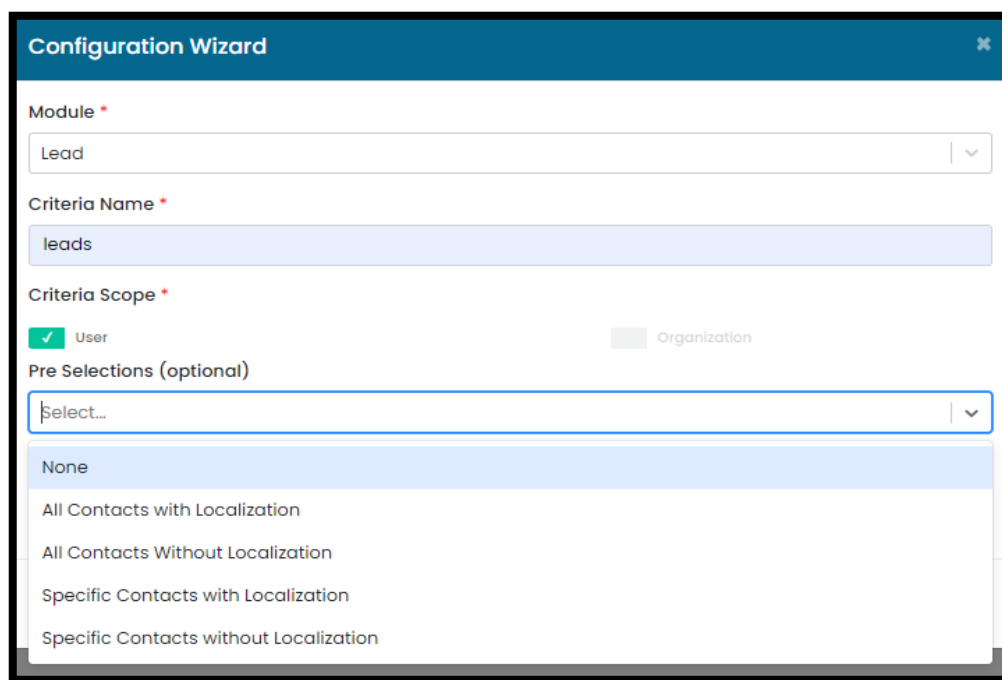
- Module ***: A dropdown menu with 'Select...' and a downward arrow.
- Criteria Name ***: A text input field.
- Criteria Scope ***: Two radio buttons, 'User' (selected) and 'Organization'.
- Pre Selections (optional)**: A dropdown menu with 'Select...' and a downward arrow.
- Step 1**: A light blue informational box with a close button (x) containing the text: 'Choose the preferred module, specify the criteria Title, and define the scope. The 'Organization' criteria scope is exclusively available for administrators to apply workflows to the overall organization's data'.
- Next**: A button at the bottom right.

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 all over 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:

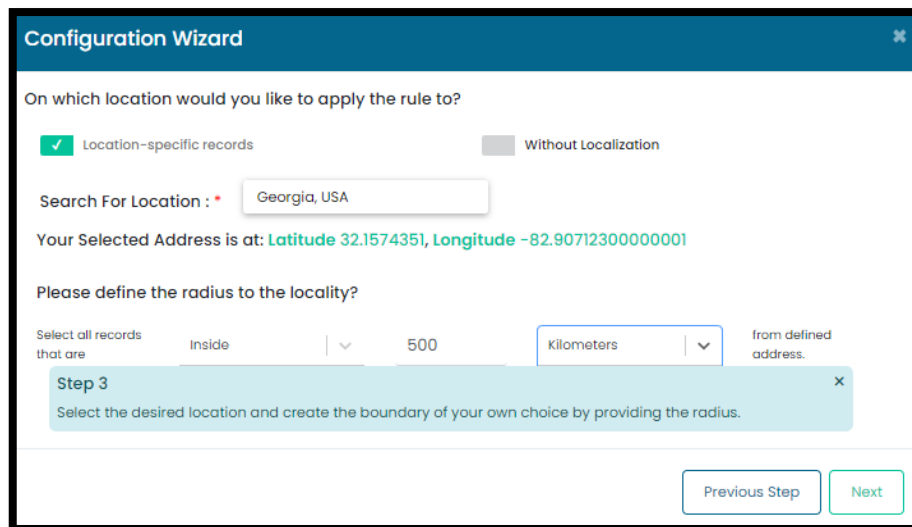


The screenshot shows a 'Configuration Wizard' window with the following fields and options:

- Module ***: A dropdown menu with 'Lead' selected.
- Criteria Name ***: A text input field containing 'leads'.
- Criteria Scope ***: Two radio buttons, 'User' (checked) and 'Organization' (unchecked).
- Pre Selections (optional)**: A dropdown menu with 'select...' selected. Below it, a list of options is visible:
 - None
 - All Contacts with Localization
 - All Contacts Without Localization
 - Specific Contacts with Localization
 - Specific Contacts without Localization

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.



Configuration Wizard

On which location would you like to apply the rule to?

Location-specific records Without Localization

Search For Location :

Your Selected Address is at: Latitude 32.1574351, Longitude -82.90712300000001

Please define the radius to the locality?

Select all records that are 500 from defined address.

Step 3
Select the desired location and create the boundary of your own choice by providing the radius.

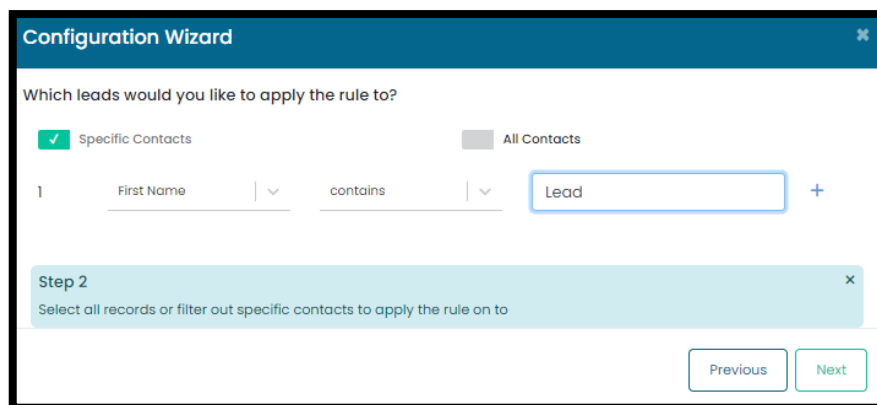
[Previous Step](#) [Next](#)

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.



Configuration Wizard

Which leads would you like to apply the rule to?

Specific Contacts All Contacts

1 contains

Step 2
Select all records or filter out specific contacts to apply the rule on to

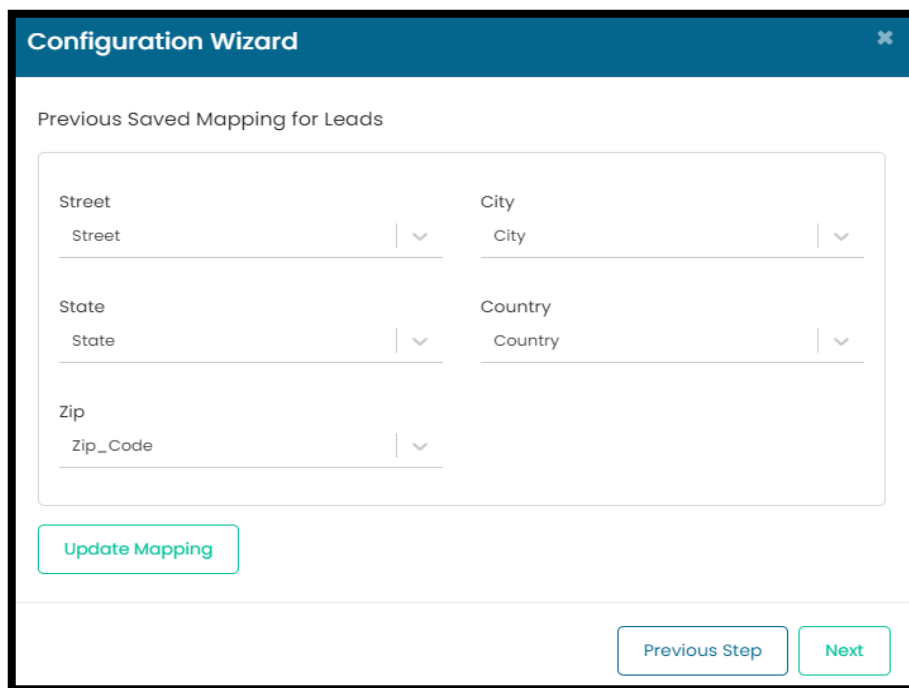
[Previous](#) [Next](#)

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.



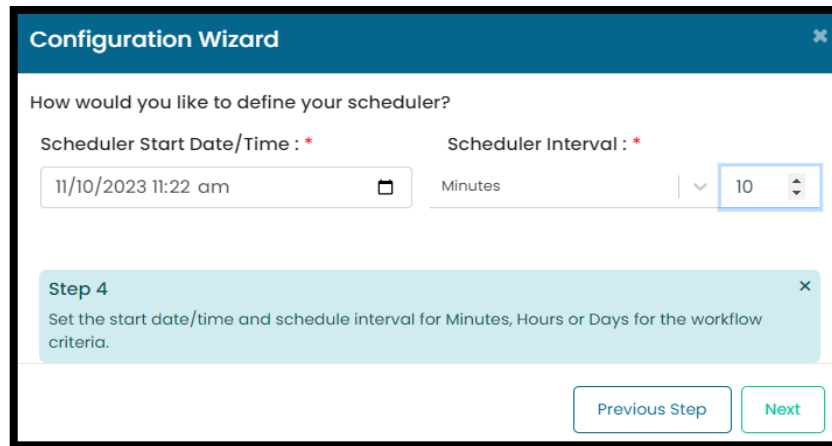
The screenshot shows a 'Configuration Wizard' window with a dark blue header. Below the header, the text 'Previous Saved Mapping for Leads' is displayed. The main area contains a mapping table with the following fields:

Street	City
Street	City
State	Country
State	Country
Zip	
Zip_Code	

Below the table is an 'Update Mapping' button. At the bottom right, there are 'Previous Step' and 'Next' buttons.

Scheduler start date /time:

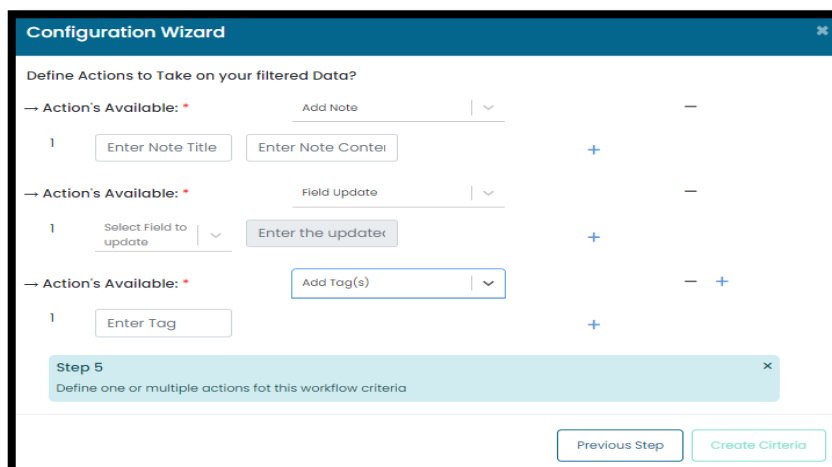
Specify the date and time to trigger workflow accordingly. The interval type specifies the time periods based on your criteria to trigger workflow after minute, hours or days.



The screenshot shows the 'Configuration Wizard' interface. The title bar is blue with the text 'Configuration Wizard' and a close button. The main content area has a white background with a blue header that says 'How would you like to define your scheduler?'. Below this, there are two input fields: 'Scheduler Start Date/Time : *' with a calendar icon and a time picker showing '11/10/2023 11:22 am', and 'Scheduler Interval : *' with a dropdown menu set to 'Minutes' and a numeric input field set to '10'. A light blue callout box labeled 'Step 4' contains the text: 'Set the start date/time and schedule interval for Minutes, Hours or Days for the workflow criteria.' At the bottom right, there are two buttons: 'Previous Step' and 'Next'.

Define actions:

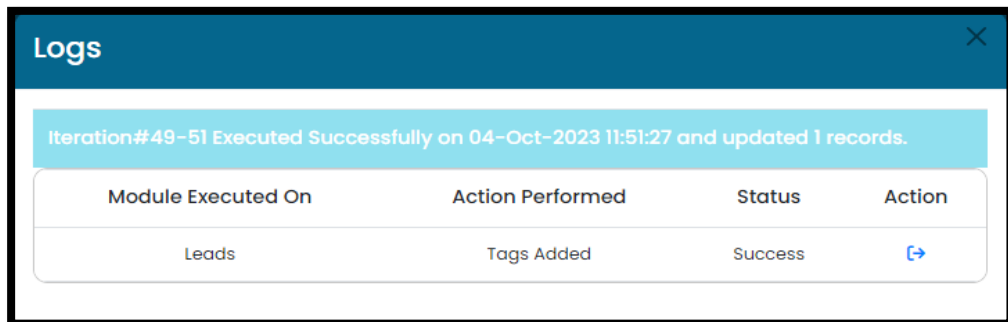
There are possibly 4 actions that you can perform. Add note, Field Update, Add Tag(s) or assign Owner. According to the interval the actions will be triggered after each interval time that you have selected in the previous step.



The screenshot shows the 'Configuration Wizard' interface. The title bar is blue with the text 'Configuration Wizard' and a close button. The main content area has a white background with a blue header that says 'Define Actions to Take on your filtered Data?'. Below this, there are three rows of action configuration. Each row starts with 'Action's Available: *' followed by a dropdown menu. The first row is 'Add Note' with a dropdown arrow and a minus sign. Below it is a list item '1' with input fields for 'Enter Note Title' and 'Enter Note Content', and a plus sign. The second row is 'Field Update' with a dropdown arrow and a minus sign. Below it is a list item '1' with a dropdown for 'Select Field to update' and an input field for 'Enter the update', and a plus sign. The third row is 'Add Tag(s)' with a dropdown arrow and minus/plus signs. Below it is a list item '1' with an input field for 'Enter Tag' and a plus sign. A light blue callout box labeled 'Step 5' contains the text: 'Define one or multiple actions for this workflow criteria.' At the bottom right, there are two buttons: 'Previous Step' and 'Create Criteria'.

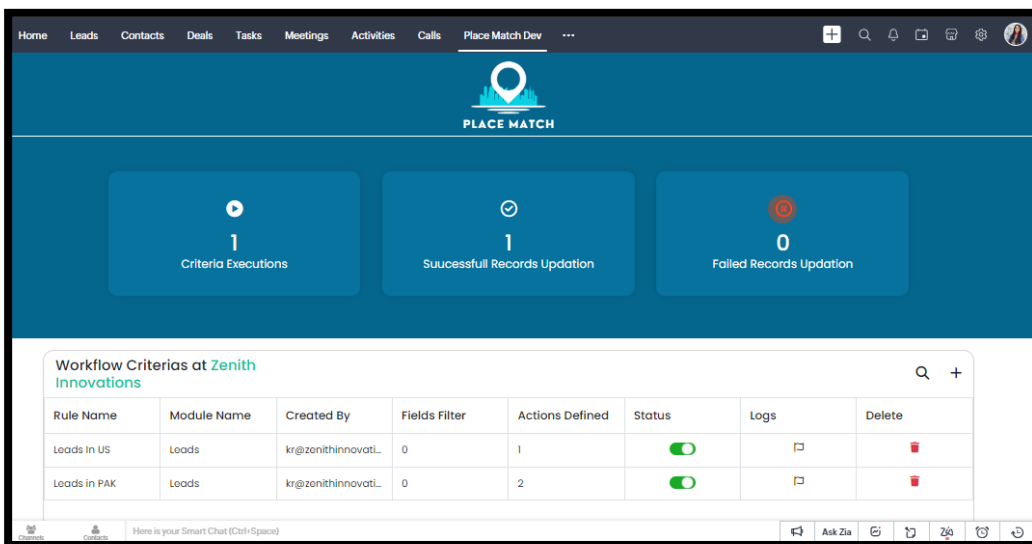
Status/ Logs:

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.



The screenshot shows a 'Logs' window with a blue header and a close button. Below the header, a light blue box contains the text: 'Iteration#49-51 Executed Successfully on 04-Oct-2023 11:51:27 and updated 1 records.' Below this is a table with the following data:

Module Executed On	Action Performed	Status	Action
Leads	Tags Added	Success	↔



The screenshot shows the 'PLACE MATCH' dashboard with a navigation menu at the top. The dashboard features three summary cards: 'Criteria Executions' (1), 'Sucessfull Records Updation' (1), and 'Failed Records Updation' (0). Below these is a table titled 'Workflow Criterias at Zenith Innovations' with the following data:

Rule Name	Module Name	Created By	Fields Filter	Actions Defined	Status	Logs	Delete
Leads in US	Leads	kr@zenithinnovatiL	0	1	<input checked="" type="checkbox"/>	📄	🗑️
Leads in PAK	Leads	kr@zenithinnovatiL	0	2	<input checked="" type="checkbox"/>	📄	🗑️

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

info@zenithinnovations.net

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Plaza 135,4th Floor, Civic Center, Bahria Town Phase IV, Rawalpindi.

