TrackingMore

TrackingMore Shipment Tracking

Zoho CRM Extension

User Manual

Version 1.0

Prepared By:

Dhruvsoft
BUILD • DEPLOY • SUPPORT

TABLE OF CONTENTS

Table of Contents

TrackingMore Shipment Tracking – Zoho CRM Extension: User Manual

1. Overview

TrackingMore helps ecommerce businesses to update and manage their shipment with efficiency.
TrackingMore Extension for Zoho CRM is a Zoho CRM Extension developed by Dhruvsoft, a Zoho Alliance Partner, and availablein Zoho Marketplace for all Zoho users to deploy as an extension for Zoho CRM.

Using this extension, Zoho CRM users can easily track your TrackingMore shipment using the Tracking Number and Courier with in the Zoho CRM account.

This User Manual document provides step-by-step instructions to install this extension from Zoho Marketplace, how to configure and use the shipment tracking functions within your Zoho CRM account.
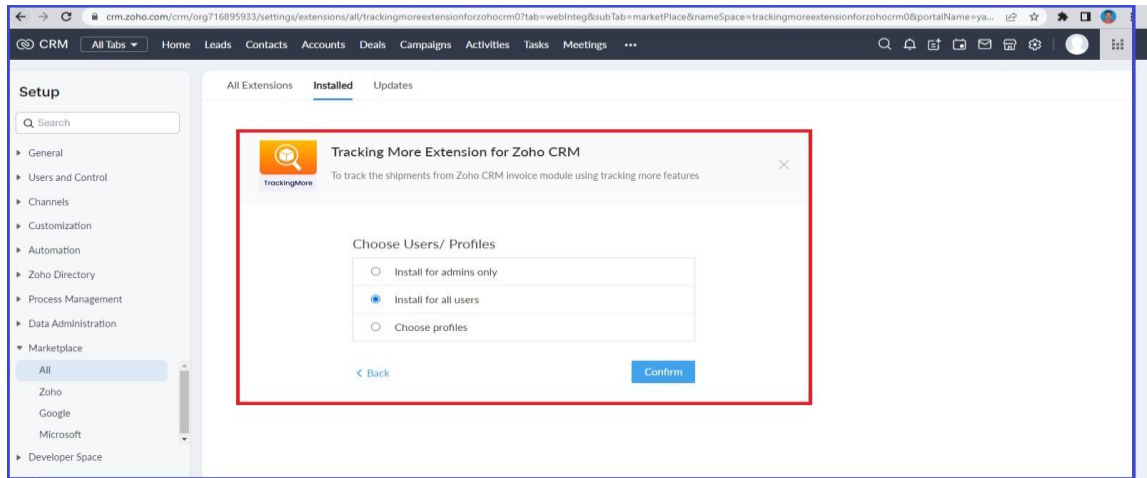
1.1. Install the TrackingMore Extension

You can both go to **Zoho Marketplace** and search for "TrackingMore" to locate the extension and install directly from the Marketplace. Alternatively, you can install the TrackingMore extension by logging in to your Zoho CRM account and follow the below installation instructions.

**To install the TrackingMore extension from within Zoho CRM**:

❖ Go to **Setup** > **Marketplace** > **All**. By default, all the Zoho extensions currently installed within your Zoho CRM account are listed. Go to "**All Extensions" tab** to view all available extensions.

❖ Click **All Extensions,** browse/search for *TrackingMore*, locate (see screenshot below) and then click the extension. The details about the extension will be shown as per screenshot below.

❖ Click **Install** button**.**

❖ Make sure you check the "Agree to the *Terms of Service" checkbox* and click **Install**.

❖ Read the Privacy Declaration and click **"Agree and Continue"**
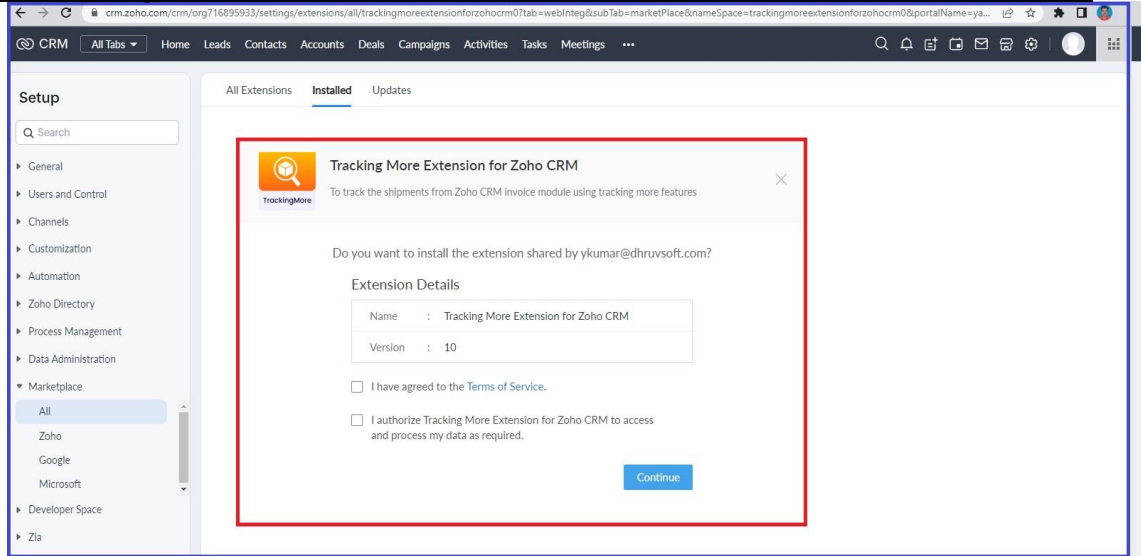
❖ Select one of the Profile of Users for whom you want to install the extension and click **Confirm** Button as shown in the screenshot below

❖ Enter the TrackingMore Credentials (TrackingMore API Key) to start working with this extension. TrackingMore (Web hook Target URL) – the way to configure in the TrackingMore Web hook as follows in next topic.
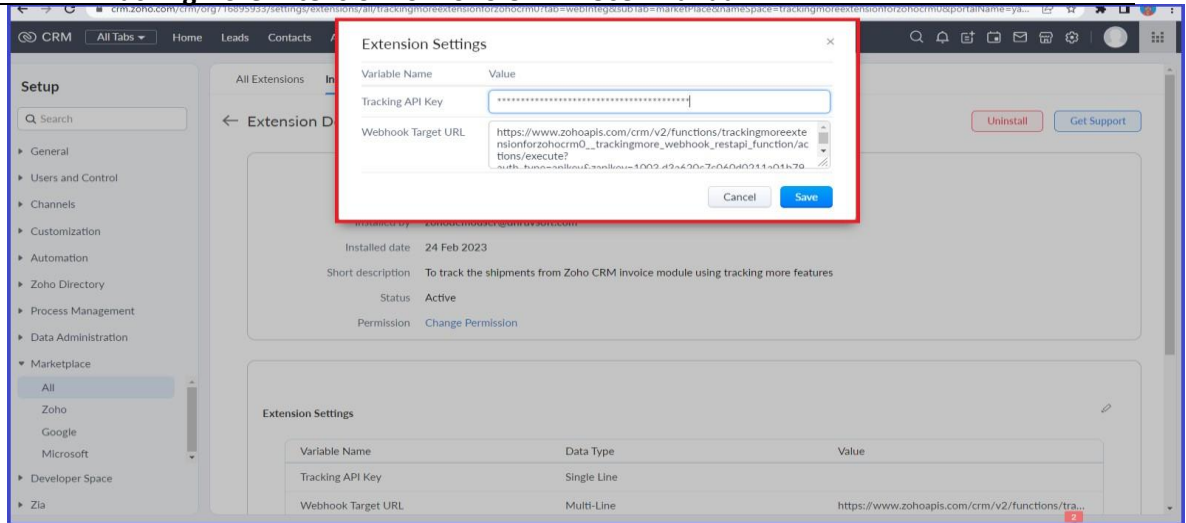
1.2. Finding your TrackingMore Credentials

To activate the TrackingMore Extension, the below TrackingMore credentials are mandatory. This section explains each of the TrackingMore credential information that you need to enter while installing the TrackingMore extension as shown in the screenshot below.

Logging in to the TrackingMore Platform:

- ❖ Email and Password: The Email and password of your TrackingMore account.
- ❖ Find the TrackingMore API Key: After Login to TrackingMore account.
- ❖ Go to 'Developers' - > 'API key' - > click "Generate API Key" button - > Enter API Key Name - > click to Save.
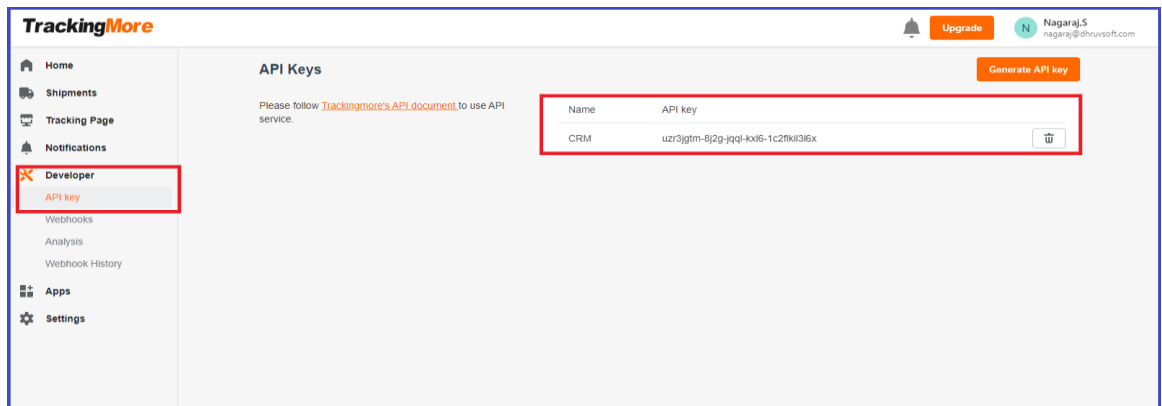
- ❖ Apply API-Key: Use this generated API key during the Extension installation process.

1.3. Uninstall the TrackingMore Extension for Zoho CRM

Uninstalling this extension from the Zoho CRM will delete all its associated data.

To uninstall TrackingMore Extension, please follow the below steps:

- ❖ Go to Setup > Marketplace > All > Installed tab. All the installed Extensions will be listed.

- ❖ Browse for TrackingMore Extension and click on the Uninstall link.

- ❖ Click Okay to confirm in the confirmation pop-up that follows. The Extension will be uninstalled.

2. Synchronization

After installing the extension in Zoho CRM, to configure the web hook URL in TrackingMore. After initial data synchronization, any data changes in Contacts , Product Name and Invoice record on TrackingMore will be updated or created in Zoho CRM instantaneously (Real-time sync).

2.1. Web hook Configuration

After installing the extension in Zoho CRM, to get the Web hook target URL from the Extension Configuration page. Then go to the TrackingMore Platform and configured the Webhook URL in this Page. The following ways to configure the Web hook URL in TrackingMore (Manual Process):

Login in to the **TrackingMore - > Go to Developers - > click Webhooks- > Add the Webhooks URL in this page. - > Enable the Callback -> Test once.**

If you are getting Success message i.e., your webhooks has been configured successfully.

If you are getting Error message i.e. please check the TrackingMore API Key & Check the Webhook URL

The data are synced Unidirectional (TrackingMore –> Zoho CRM).
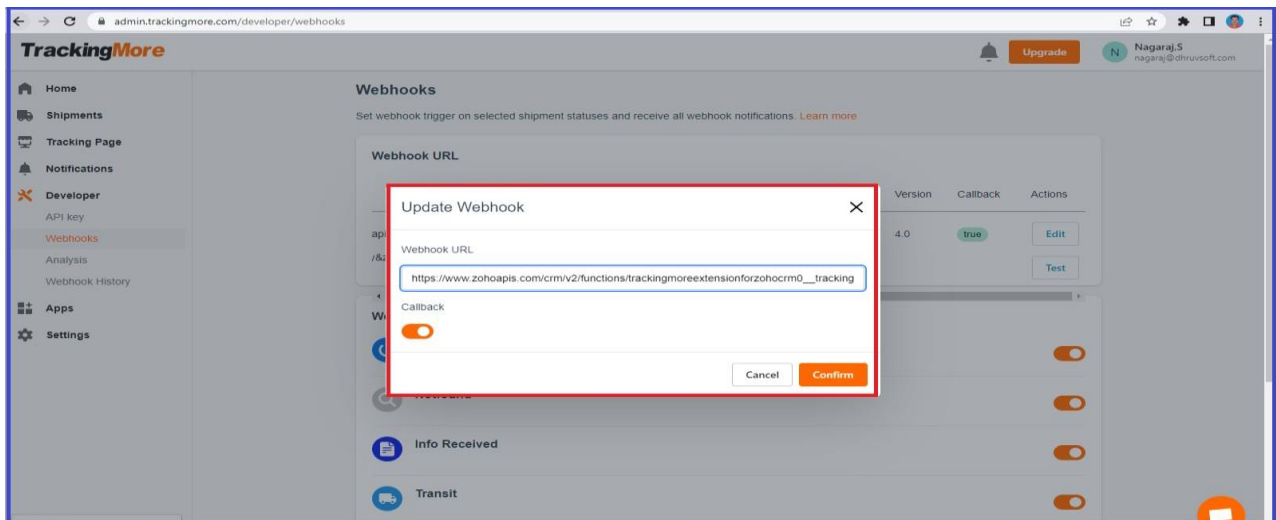
Enabling the Web hook Settings: After configuring the web hook URL enable the triggered point which you want to trigger (Some default triggered points provided by the TrackingMore). Based on the triggered points, the response goes into the Zoho CRM Shipments.
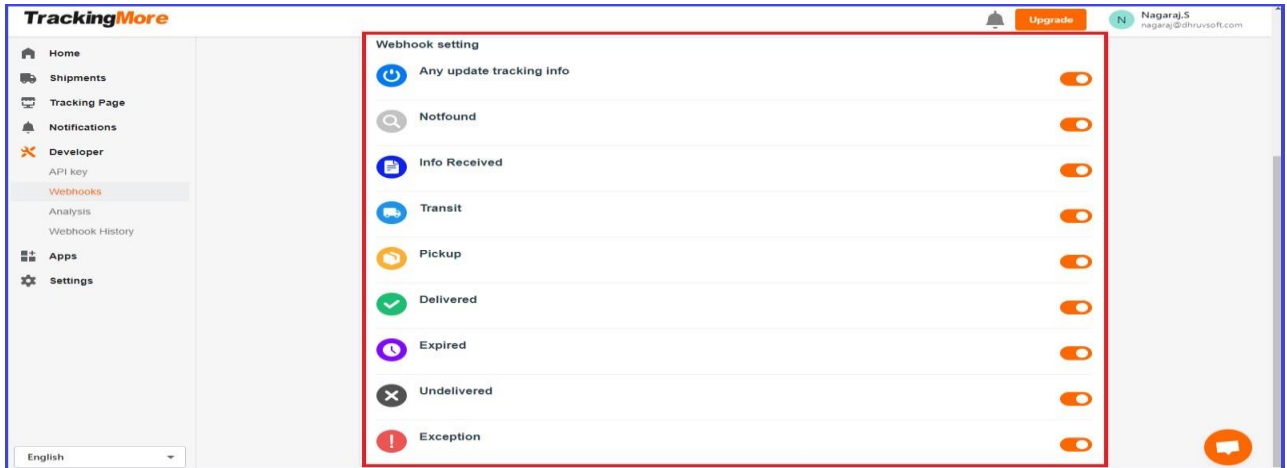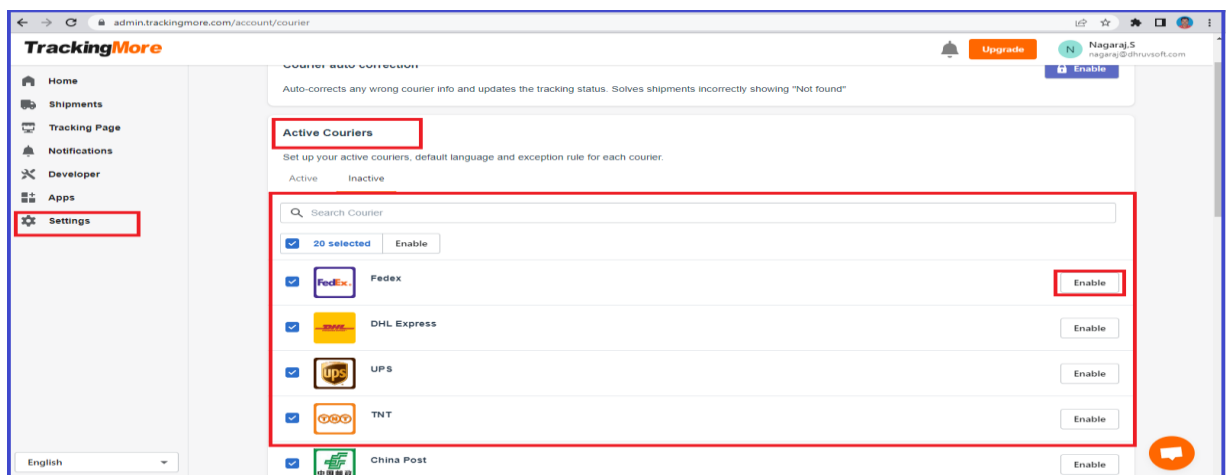

2.2. Enabling the Couriers

For shipments created based on courier services. Before we should enable the courier services in TrackingMore.

The following ways to enable the courier services on the TrackingMore:

Go to TrackingMore - > Settings -> Couriers -> Click In active -> Choose couriers -> Enable the Couriers

2.3. Add Shipments

After successfully configuring the web hook URL & enabling the couriers, create a Shipments from the TrackingMore, while clicking the "Add Shipments" button to create the shipments in TrackingMore.
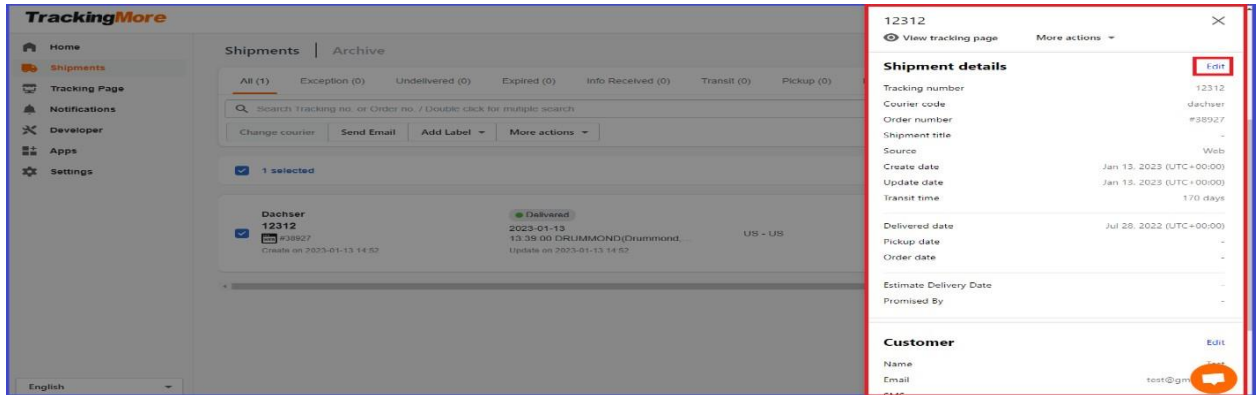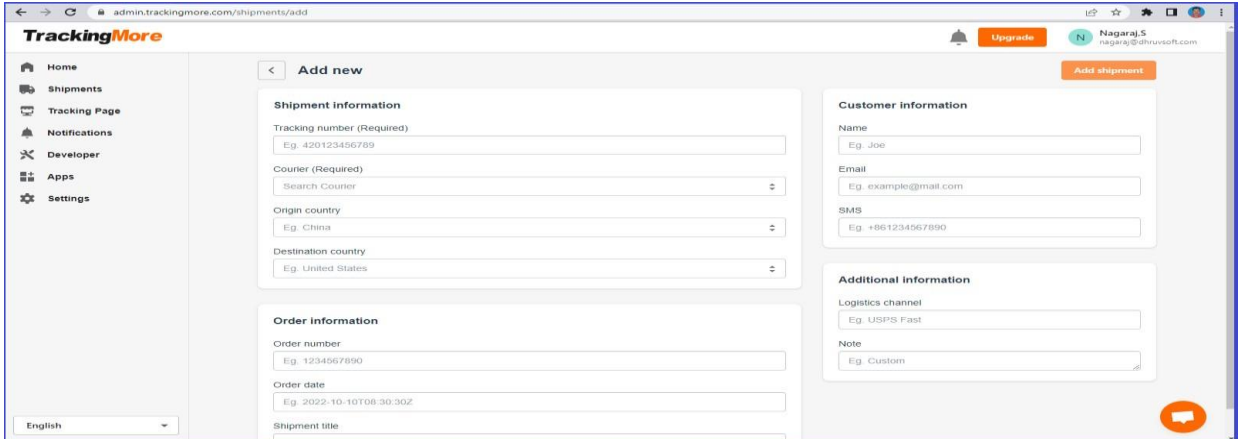
After adding the shipments the corresponding invoice record will created into the Zoho CRM

2.4. Sync Contacts from TrackingMore to Zoho CRM Contacts

After the successful syncing of TrackingMore shipments, the following fields are mapped in contacts module of Zoho CRM.
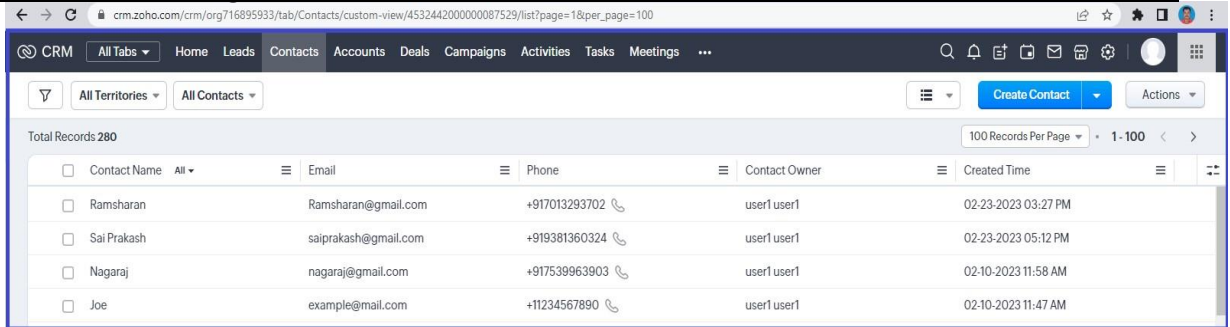
TrackingMore Shipments Fields	Zoho CRM Contacts Fields
Contact Name	Name
Contact Email	Email
SMS Phone	Phone

2.5. Sync Products from TrackingMore to Zoho CRM Products

After the successful syncing of TrackingMore shipments, the following fields are mapped in Products module of Zoho CRM.

TrackingMore Shipments Fields	Zoho CRM Products Fields
Title	Product Name

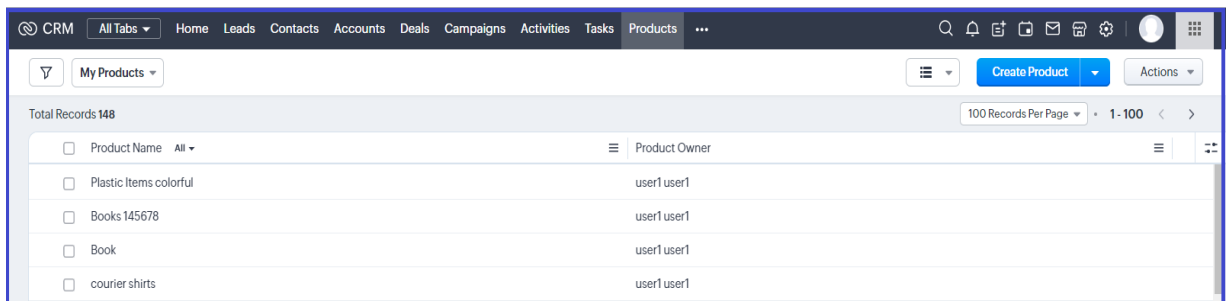## 2.6. Sync Shipments from TrackingMore to Zoho CRM Invoice

After the successful syncing of TrackingMore shipments, the following fields are mapped in Invoice module of Zoho CRM.

TrackingMore Shipments Fields	Zoho CRM Invoice Fields
Tracking Number	Tracking Number
Courier	Courier
Order Number	Subject
Customer Name	Contact Name
Shipment Title	Product
Note	Description

Order Date   Order Date &Time
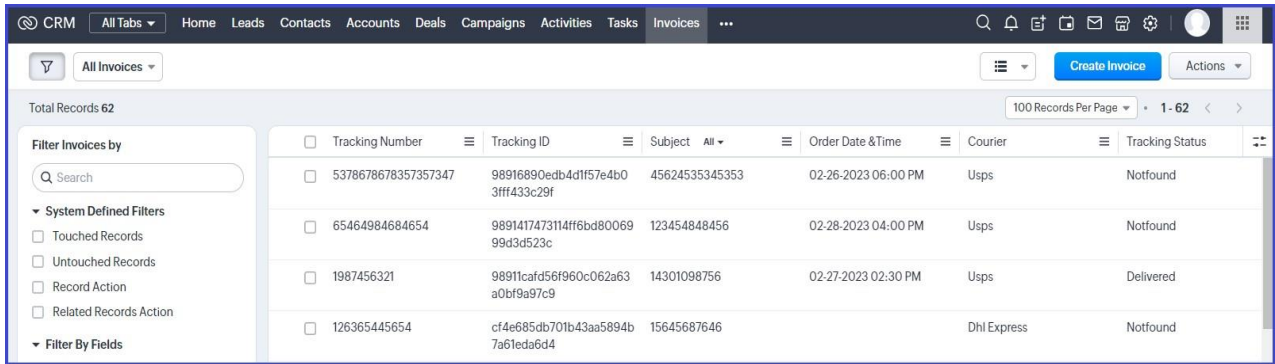
3. Invoice

The user can track any shipment by entering TrackingMore tracking number within the Invoice module of Zoho CRM.

3.1. Create Shipments from Zoho CRM to TrackingMore Shipments

In Invoice module, the following fields are created after the successful installation of TrackingMore Extension.

Below are the details of the custom fields created by the extension within **Invoice** module.

- ❖ **Tracking Number**   : Text Field
- ❖ **Tracking Status**   : Text Field
- ❖ **Courier**   : Text Field
- ❖ **Order Date and Time**   : Date Time Field
- ❖ **Create Shipment Tracking**   : Checkbox Field
- ❖ **Tracking Information**   : Multiline Filed
- ❖ **Tracking Id**   : Text Field
- ❖ **Tracking Status**   : Text Field

For the Following fields are mandatory for creating shipments from Zoho CRM to TrackingMore.

Subject / Order No, Tracking Number, Courier, Create Shipment Tracking, Contact Name, Product Name, Description

From the Invoice module to create the shipments infromation into the TrackingMore Shipments. After Clicking the "Save" button, The Tracking Information Added in the Tracking Infromation field and also Tracking Status will be updated in the Tracking Status field.

After Successful creation Sales Signals will be triggred in notification bell icon.
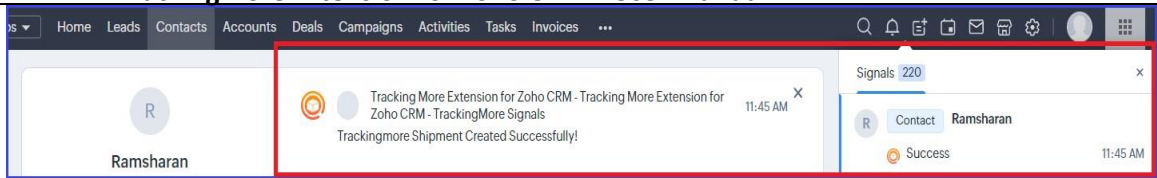
3.2. Update Shipments from Zoho CRM to TrackingMore Shipments

In Invoice module, to update the TrackingMore shipments based on the tracking Id and TrackingMore number.

To update the following fields the relevant information needs to be changed into the TrackingMore website.

Below are the details of the custom fields that are Mandatory for updating shipment.

- ❖ **Tracking Number**   : Text Field

- ❖ **Tracking Id**   : Text Field

- ❖ **Update Shipment Tracking**   : Checkbox Field

After Successful updated information we could see under the invoice record for tracking information field and also could see the sales signals for successfully updated tracking Status.

4. Custom Button Actions

CRM Administrators can create new buttons and define a set of actions based on their requirements. Custom Buttons in Zoho CRM can be used to connect your CRM with third party applications, connect Zoho CRM invoice modules or connect with other Zoho applications.

This extension will create four custom buttons in following locations.

❖ **Get Tracking** (Module: Invoice. Position: Detailed View - Each record)

❖ **Detect Courier** (Module: Invoice. Position: Detailed View – Each record)

❖ **Get Tracking** (Module: Invoice. Position: List View - Each record)

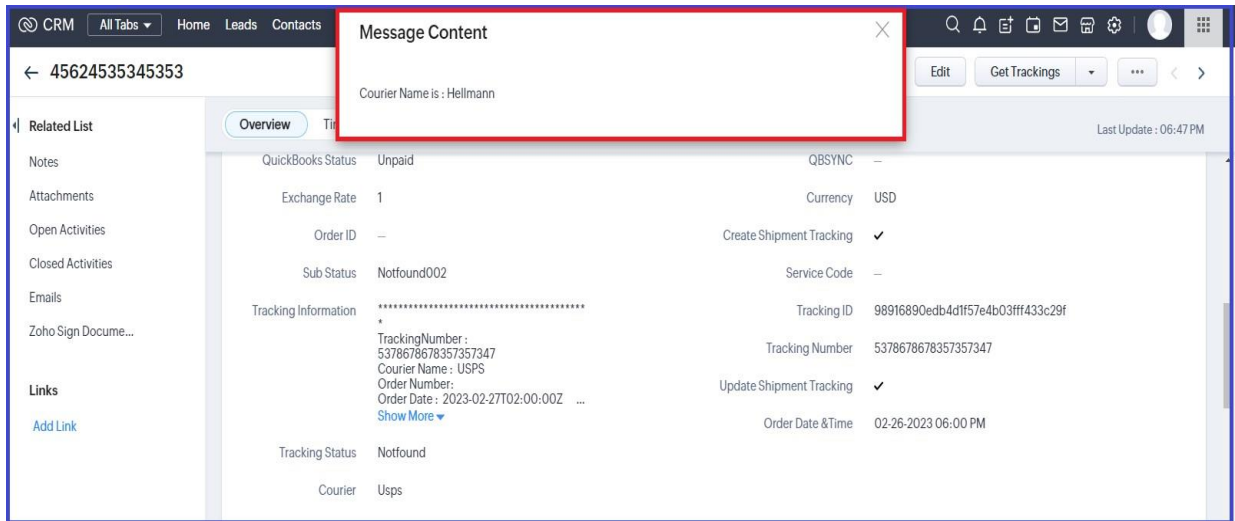❖ **Delete Tracking** (Module: Invoice. Position List View – Mass Action Menu)

4.1. Get Tracking (Zoho CRM – TrackingMore)

In Invoice, we have created "Get Tracking" button in Detailed View– for Each Record Position. By clicking this button will get you Tracking Information of the TrackingMore Shipment and update the Information back into "Tracking Information" field and Some Custom fields in Invoice
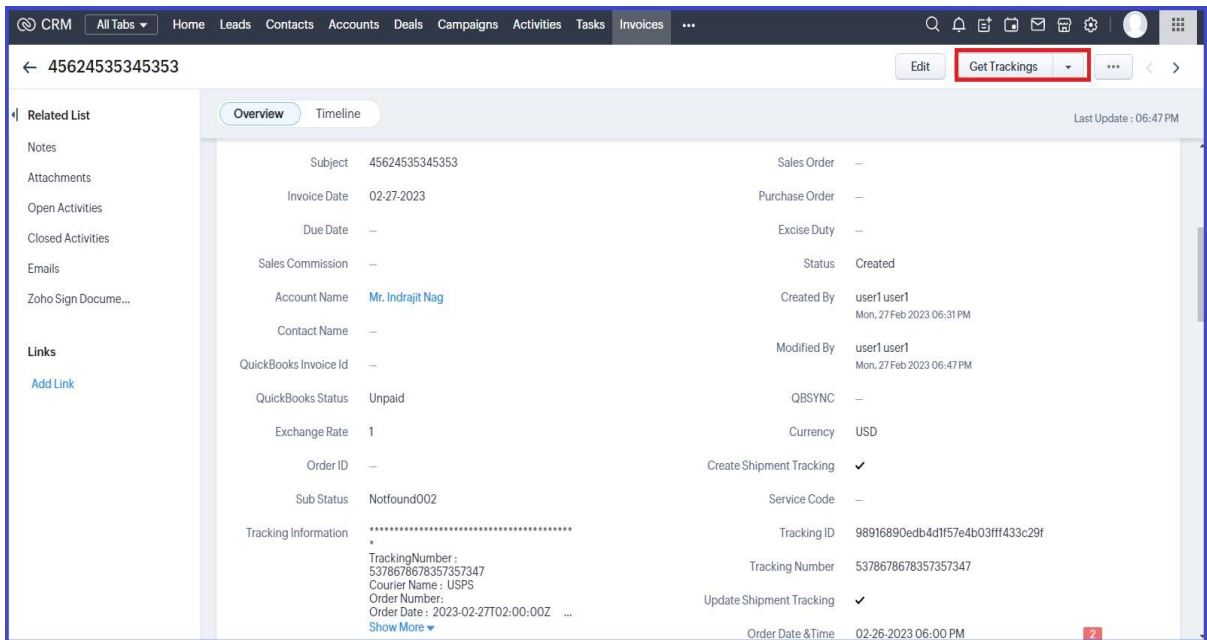
4.2. Detect Courier (Zoho CRM – TrackingMore)

In Invoice, we have created a "Detect Courier" button in Detailed View – For Each Record Position. By clicking this button will get you Courier Information of the TrackingMore and Displayed courier information into the message box in Invoice module.

## 4.3. Delete Tracking (Zoho CRM – TrackingMore)

In Invoice list view, we have created a "Delete Tracking" button in List View - Mass Action Position. When you selecting Invoice (By clicking check box) you can see the Delete Tracking button. By clicking the Delete Tracking will delete you invoice in Zoho CRM and also delete the corresponding shipments in the TrackingMore.
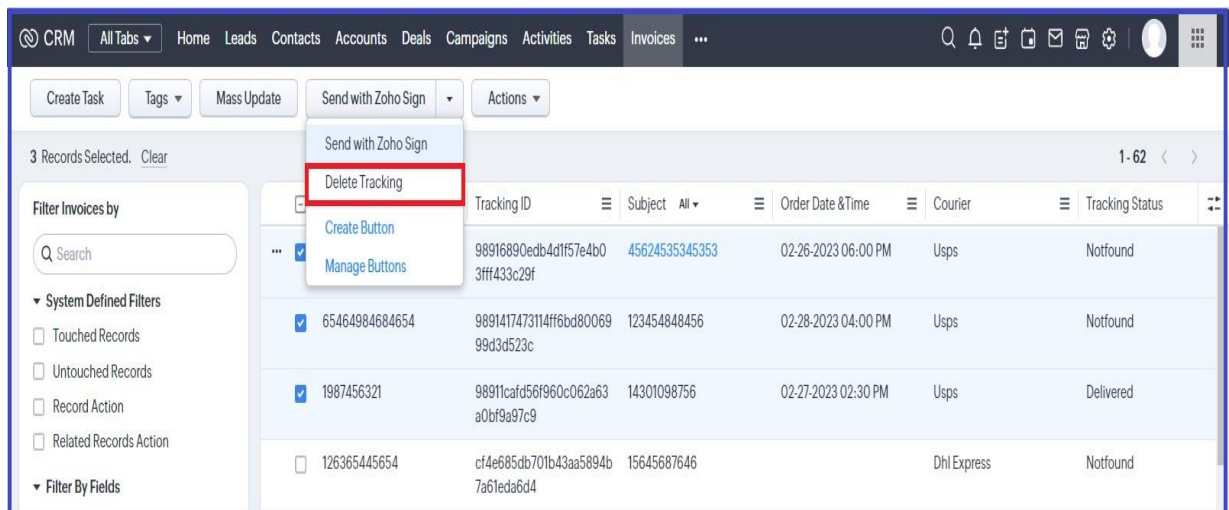
5. Important Note

5.1. Sales Signals

The user will receive the real-time notifications for TrackingMore functionality inside the Zoho CRM as Sales Signals. Sales Signals notifications are displayed when you click [icon] on the top-right corner of the Zoho CRM home page. The signal will be raised, when there is a value for Contact Name with valid email address.
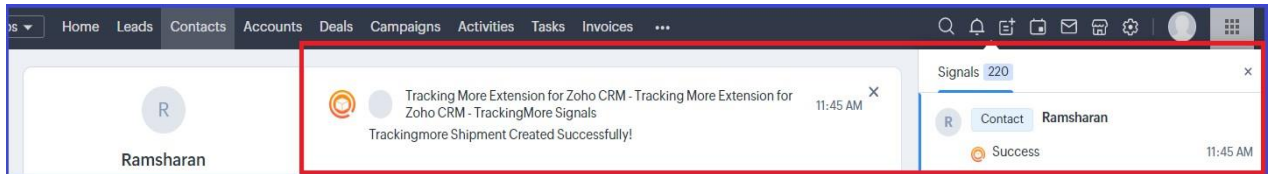
6. Support Contacts for TrackingMore Extension –Dhruvsoft Help Desk

Thank you for installing TrackingMore Extension. If you have any questions or facing installation issues, please contact Dhruvsoft Support Desk for Zoho Extensions via email at support@dhruvsoft.com or call us at **(+91 9704056000)**.

***