



## Icetrak Zoho Extension Setup Guide

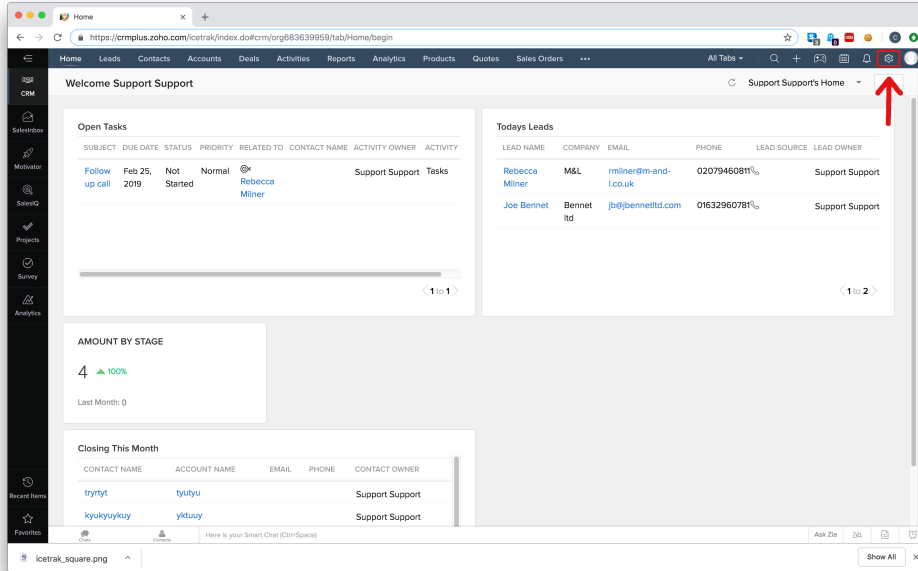


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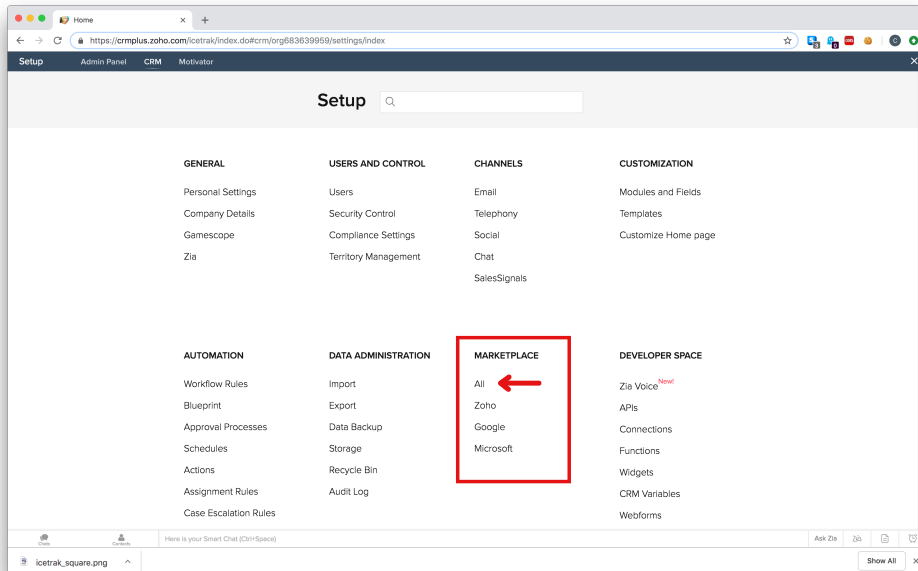
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# 1 Installing the Extension

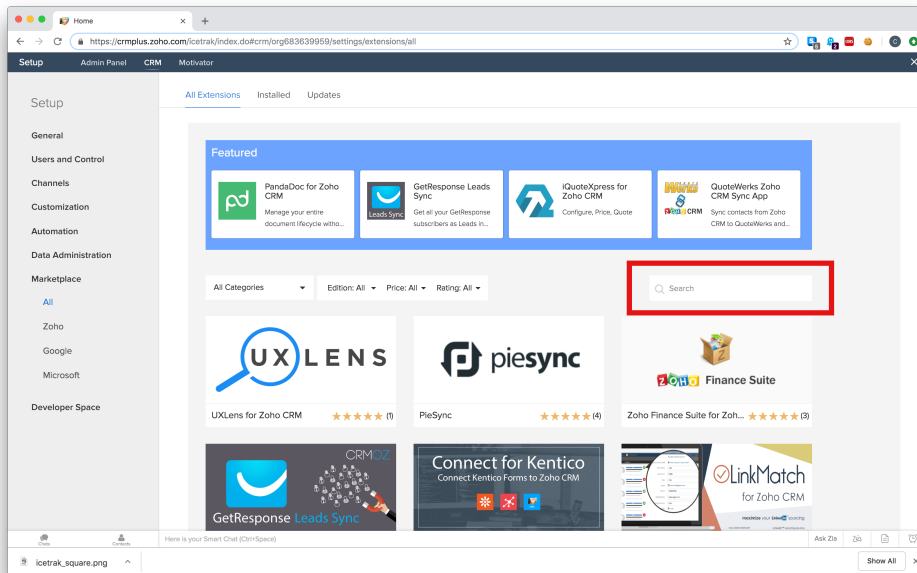
1. To Install the Icetrak SMS extension in your Zoho CRM first navigate to the Zoho extension marketplace by clicking the settings icon in the top right-hand corner of the screen



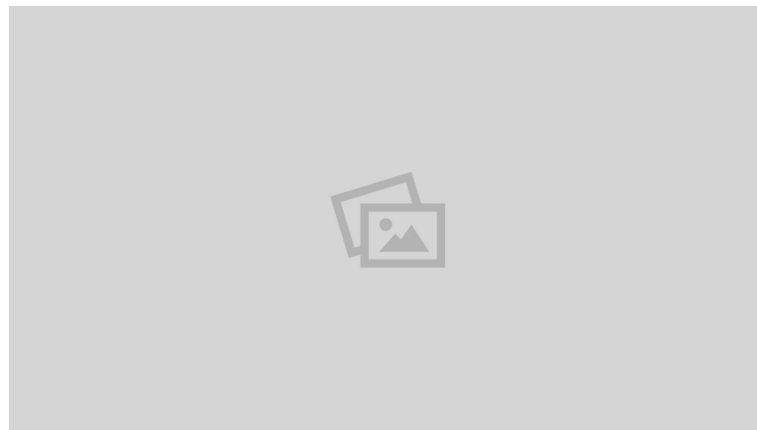
2. Then, under the section *Marketplace*, select the *All* option.



3. In the search bar on the right-hand side of the screen enter 'Icetrak SMS' and select that option from the list that appears.



4. This takes you to the Icetrak SMS extension page. To install the extension click the orange *install* button.



This will take you through the installation process step by step and when it is finished will show you the extension settings page.

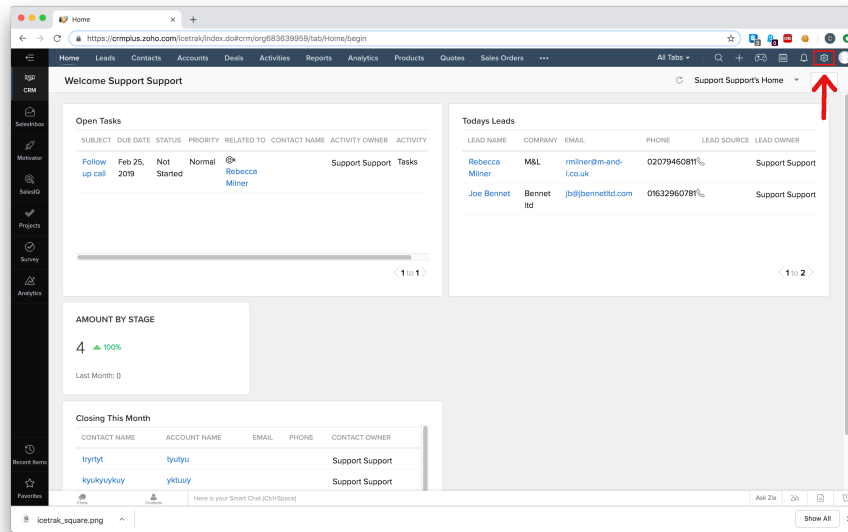
**N.B. In order to send messages from the Icetrak Extension you will need to create an account with Icetrak by contacting us either by email at [customer.services@icetrak.net](mailto:customer.services@icetrak.net) or by phone on 01684 568672**

## 2 Extension Settings

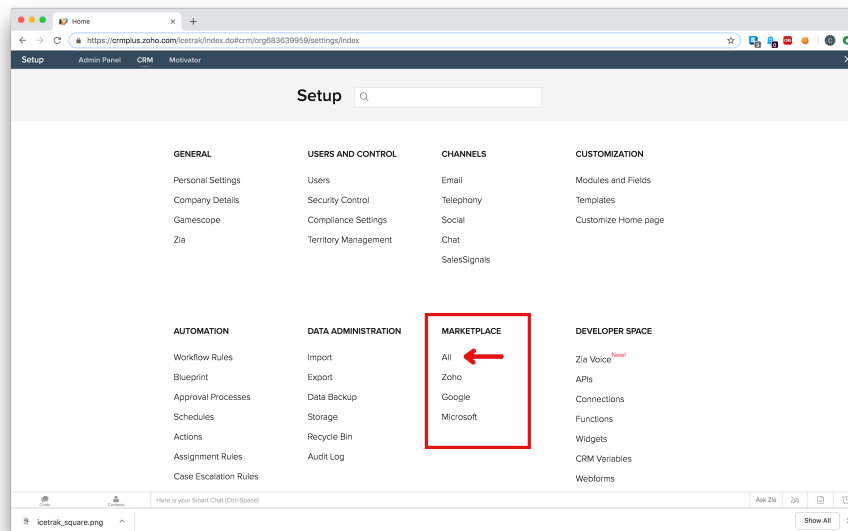
### 2.1 Finding the Extension settings

If you have just followed *Section 1* then you should already be at the extension settings page and you can skip to Section 2.2. Otherwise:

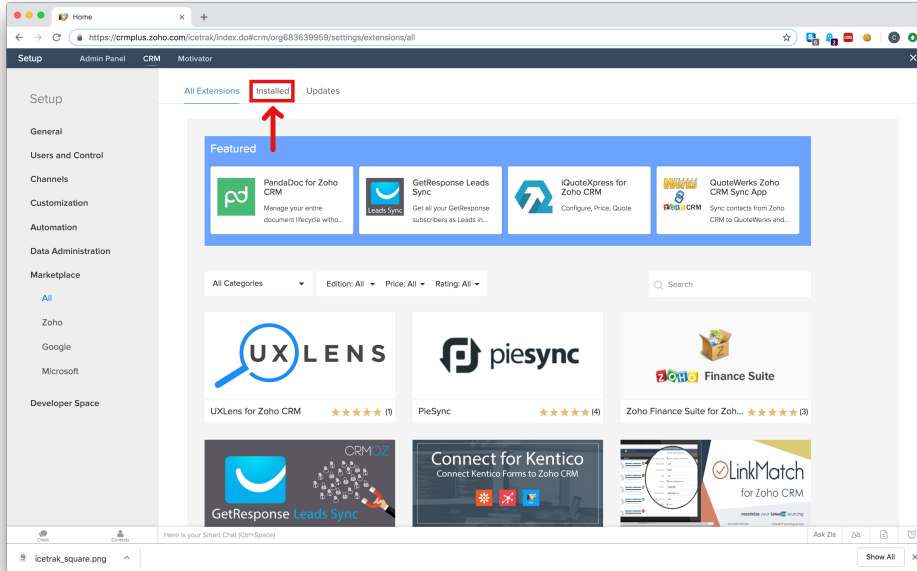
1. Navigate to the Zoho extension marketplace by clicking the settings icon in the top right-hand corner of the screen



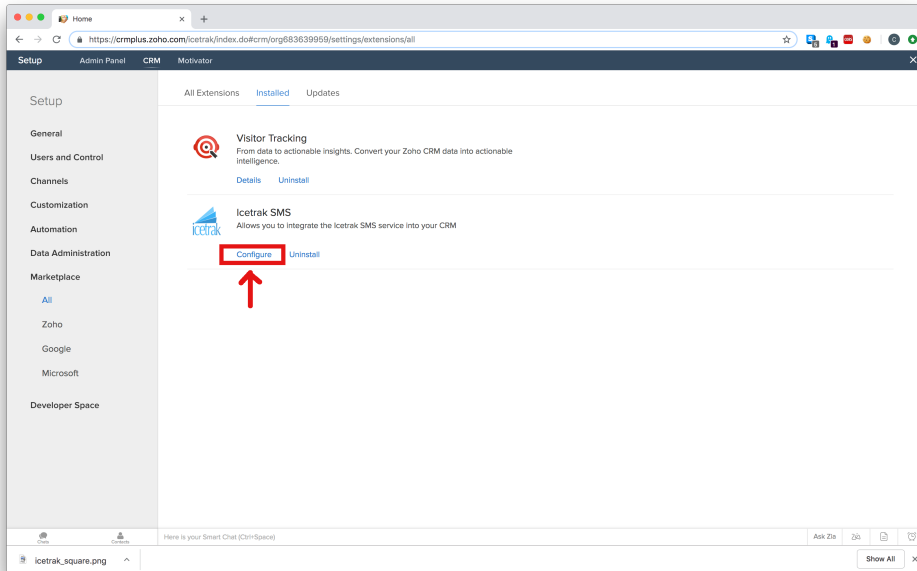
2. Then, under the section *Marketplace*, select the *All* option.



3. From the tabs at the top of the page select *installed*



4. Select the configure option on the Icetrak SMS extension



This brings you to the extension settings page.

## 2.2 Icetrak PIN Setting

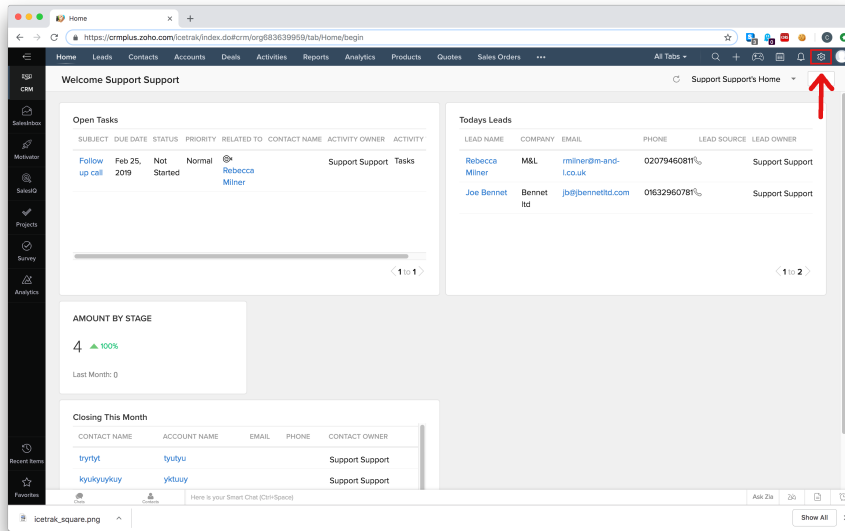
**N.B. To complete this part of the set-up you will need to create an account with Icetrak by contacting us either by email at [customer.services@icetrak.net](mailto:customer.services@icetrak.net) or by phone on 01684 568672**

Once you have created an account with Icetrak we will send you a PIN. Enter this PIN into the *Icetrak PIN* option.

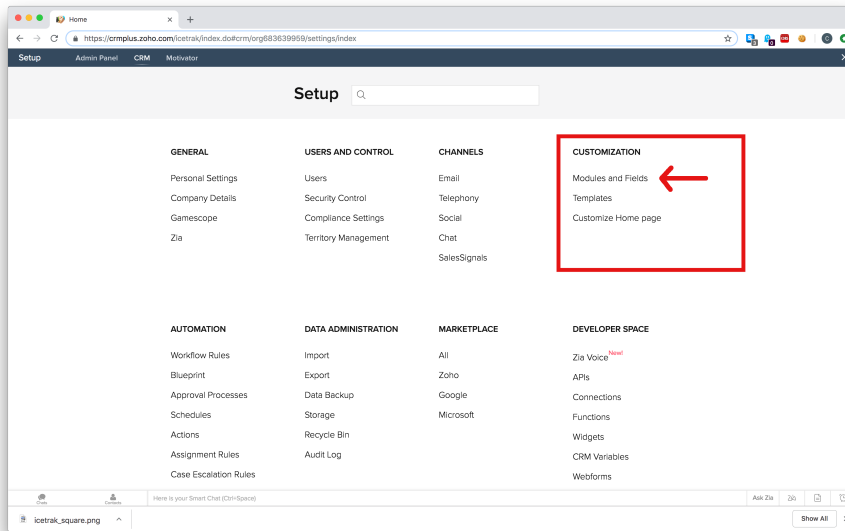
### 3 Setup Lead Conversion Mapping

For Leads that are converted into contacts to retain records of SMS messages sent to them you need to set up the mapping of some fields from the lead onto the contact.

1. To get to the lead conversion mapping settings go into the Zoho CRM settings by clicking the settings icon in the top right-hand corner of the screen.

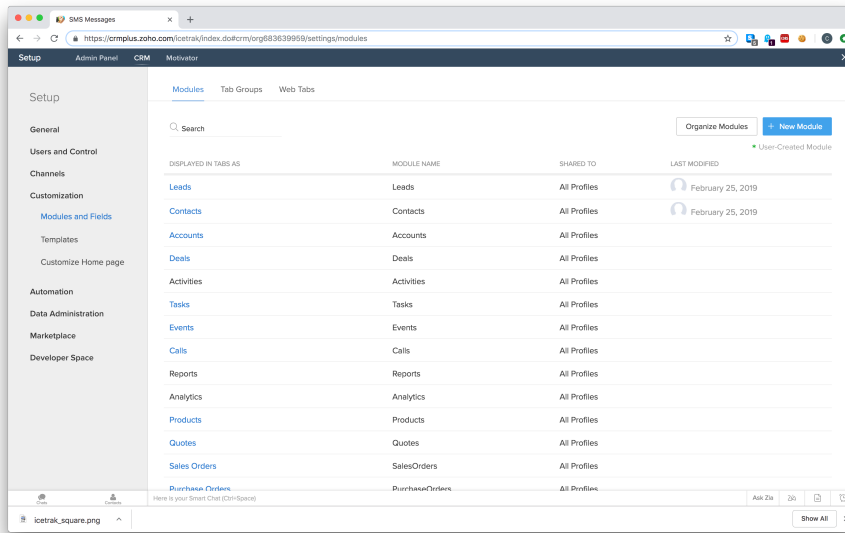


2. Under the *Customization* section select *Modules and Fields*

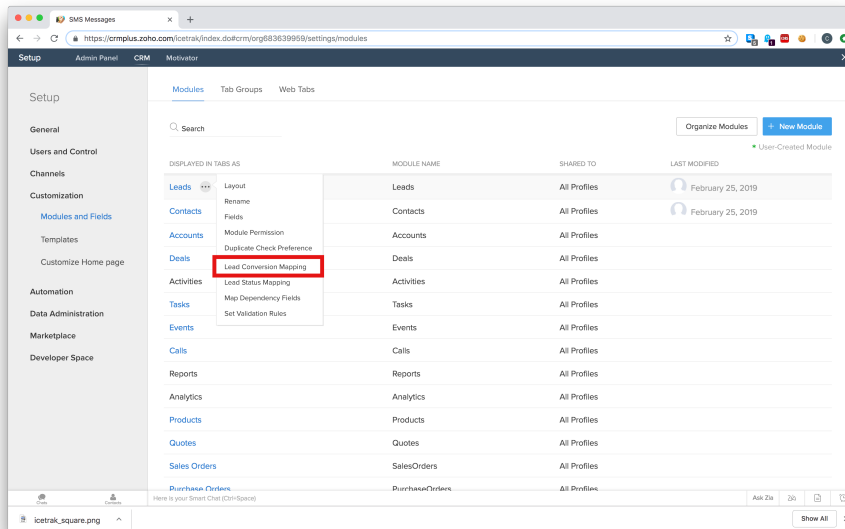


This will take you to the screen shown below

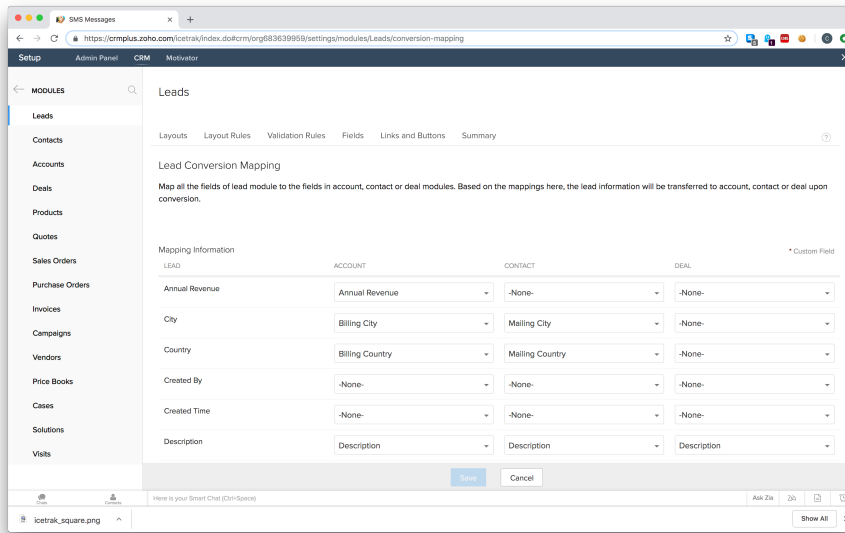




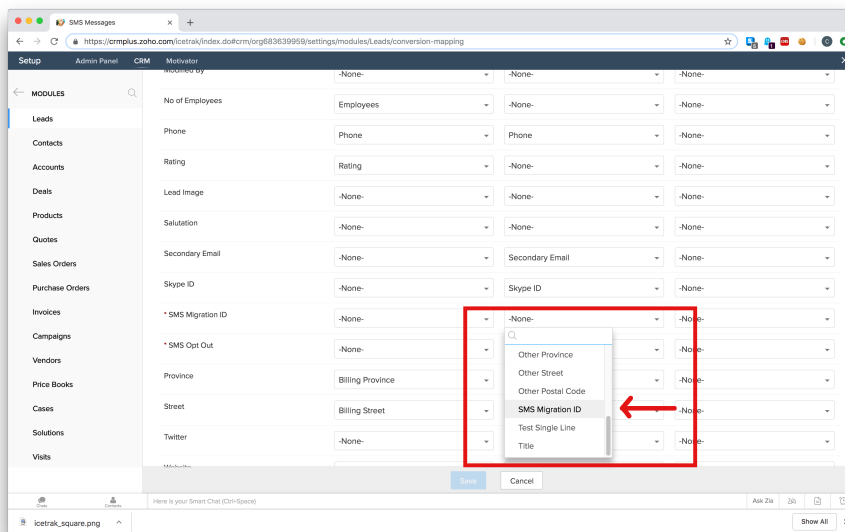
3. Hovering the mouse to left of *Leads* will cause a menu to appear as shown bellow. From the menu select *Lead Conversion Mapping*



This will take you to the lead conversion mapping settings. This allows you to tell Zoho how the fields in a lead should be turned into a contact when you convert it. The lead conversion mapping settings are shown bellow.



4. Scroll down on this screen until you find the *SMS Migration ID* field
5. In the second column of boxes (labelled at the top *Contact*) select *SMS Migration ID* from the drop down list



6. Repeat step 5 for the field *SMS Opt Out* (selecting *SMS Opt Out* from the drop down instead of *SMS Migration ID*)

This Completes the extension set-up. The extension is now ready to use. Continue to section 4 for instructions on using the extension.

## 4 Using the Extension

### 4.1 Extension Components

This section contains a list of all the components the extension adds to the CRM

#### 4.1.1 Modules

1. **SMS Requests** - This module contains one record per SMS Message sent and can act as a history of messages sent from your CRM. It contains the information that the extension uses to send messages and none of the fields should be manually edited. This Module can be hidden from users if the administrator wishes.

#### 4.1.2 Buttons

1. **Send SMS (List View)** - This button is added on the List view in both Contacts and Leads. It will create an SMS messages that will be sent to all records selected in the list view. For more information on using these buttons go to section 4.2.
2. **Send SMS (Details View)** - This button is added on the Details view of each record in both Contacts and Leads. It will create and SMS message that will be sent to the Contact or Lead that the view details. For more information on using these buttons go to section 4.3.

#### 4.1.3 Workflows

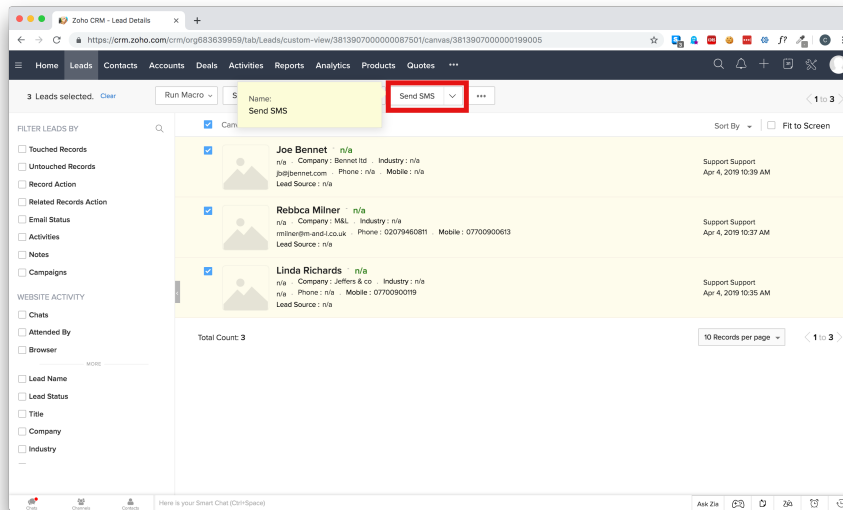
1. **Migrate SMS** - This Workflow handles moving the SMS history when a lead is converted into a contact.

#### 4.1.4 Fields

1. **SMS Migration ID** This field will be automatically filled in when a lead or contact has had an SMS message sent to them. It is used by the *Migrate SMS* workflow to move the SMS history from a lead to a contact. This field should not be manually edited and it is recommended that the visibility on this field is restricted to administrator accounts.
2. **SMS Opt Out** This field is used to record if a contact or lead has opted out of receiving SMS messages. Having this option checked will cause messages sent to that recipient to fail and an email to be generated informing you of the failure.

## 4.2 Send an SMS to Multiple Contacts or Leads

1. Select any number of Recipients from the list in either the Contacts or Leads modules and then press the *Send SMS* at the top of the screen. If you have more than one custom button, either from another extension or that you have made yourself, then the *Send SMS* button may appear in a drop down list.



2. This will bring up the Send SMS dialogue box as shown below.

Send SMS

Icetrak Send SMS

Enter your message here...

Submit

Characters Remaining: 160

► Total selected: 3  
Sendable: 1  
No Number: 1  
Opt Out: 1

- At the bottom left of the dialogue is a summary of how many of the selected the recipients the message can actually be sent to, either because they have opted out, or because there is no mobile number present. Clicking the summary will show a more detailed report (Shown below)

Send SMS
✕

### Icetrak Send SMS

Enter your message here...

Characters Remaining: 160

Submit

---

▼ Total selected: 3  
 Sendable: 1  
 No Number: 1  
 Opt Out: 1

Name	Mobile	Status
Joe Bennet	-	No Number
Rebbca Milner	-	Opt Out
Linda Richards	07700900119	OK

The summary will mark a record as red if there is no mobile phone number present in the record and orange if the recipient has opted out of receiving SMS messages. If you try to send the message it will not be sent to records marked red or orange but will be sent to records marked with green.

- Once you are happy with the recipients type your message in the text area containing *Enter your message here....* There is a limit to the number of characters that can be sent per message, by default this limit is 160 (This can be changed by contacting us - see Section 5). When you get near the Character limit the counter will turn orange, notifying you that you don't have many characters left.

Lorem ipsum dolor sit amet, .....consectetur adipiscing elit. Nunc eu  
 cursus elit. Morbi quis eros eget turpis rutrum .....ullamcorper quis  
 et lorem. .....Duis non .....dui

Characters Remaining: 7

If you exceed the character the limit the character counter and the border will turn red. Trying to submit the message at this point will cause an message to appear telling you that the message cannot be submitted because it is too long.

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc eu cursus elit. Morbi quis eros eget turpis rutrum ullamcorper quis et lorem. Duis non dui Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc eu cursus elit. Morbi quis eros eget turpis rutrum ullamcorper quis et lorem. Duis non dui nullam. |

Characters Remaining: -153

5. When you are done click the submit button. This will create a record of the message in Zoho CRM and submit the message to Icetrak for sending. A message will appear saying *Message Submitted*

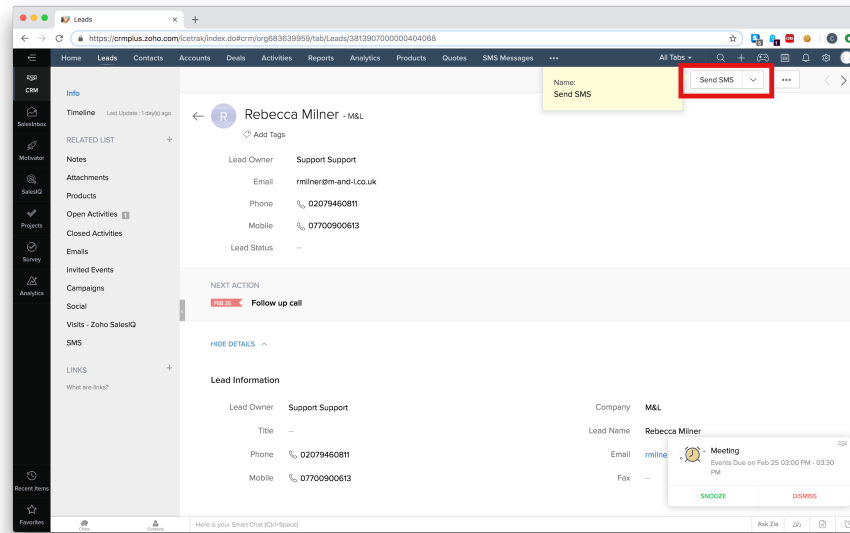
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc eu cursus elit. Morbi quis eros eget turpis rutrum ullamcorper quis et lorem. Duis non dui

Submit

Characters Remaining: 7  
Message submitted

### 4.3 Send an SMS to a single Contact or Lead

1. From the details view of a lead or contact, click the *Send SMS* button in the top right-hand side of the screen (If you have more than one custom button, either from other extensions or ones that you have created yourself, then the *Send SMS* button may appear in a drop down list).



2. From there follow the steps in section 4.2 starting at step 2

## 5 Further Assistance

If you require any further assistance with our services feel free to email us at [customer.services@icetrak.net](mailto:customer.services@icetrak.net) or call us on 01684 568672