

Icetrak Zoho Extension Setup Guide



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5 Further Assistance



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

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| Follow Feb 25, up call 2019 | Not Normal Started | ©ª Rebecca | Support | Support Tasks | R | ebecca filner | M&L | rmilner@m-and- l.co.uk | 02079460811 | 6 | Support Supp |
| | | Milner | | | J | oe Bennet | Bennet Itd | jb@jbennetltd.com | 01632960781 | 6 | Support Supp |
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2. Then, under the section *Marketplace*, select the *All* option.

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| | | GENERAL | USERS AND CONTROL | CHANNELS | CUSTOMIZATION | | | |
| | | Personal Settings | Users | Email | Modules and Fields | | | |
| | | Company Details | Security Control | Telephony | Templates | | | |
| | | Gamescope | Compliance Settings | Social | Customize Home page | | | |
| | | Zia | Territory Management | Chat | | | | |
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| | | Workflow Rules | Import | AI 🔶 | Zia Voice ^{New!} | | | |
| | | Blueprint | Export | Zoho | APIs | | | |
| | | Approval Processes | Data Backup | Google | Connections | | | |
| | | Schedules | Storage | Microsoft | Functions | | | |
| | | Actions | Recycle Bin | | Widgets | | | |
| | | Assignment Rules | Audit Log | | CRM Variables | | | |
| | | Case Escalation Rules | | | Webforms | | | |
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| instally services and | | | | | | | | Show A |





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 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

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| up ci | 2019 | Started | Rebecc Milner | • | | | | Milner | | l.co.uk | | | |
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2. Then, under the section *Marketplace*, select the *All* option.

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| | GENERAL | USERS AND CONTROL | CHANNELS | CUSTOMIZATION | |
| | Personal Settings | Users | Email | Modules and Fields | |
| | Company Details | Security Control | Telephony | Templates | |
| | Gamescope | Compliance Settings | Social | Customize Home page | |
| | Zia | Territory Management | Chat | | |
| | | | SalesSignals | | |
| | | | | | |
| | | | | | |
| | AUTOMATION | DATA ADMINISTRATION | MARKETPLACE | DEVELOPER SPACE | |
| | Workflow Rules | Import | All 🔶 | Zia Voice ^{New!} | |
| | Blueprint | Export | Zoho | APIs | |
| | Approval Processes | Data Backup | Google | Connections | |
| | Schedules | Storage | Microsoft | Functions | |
| | Actions | Recycle Bin | | Widgets | |
| | Assignment Rules | Audit Log | | CRM Variables | |
| | Case Escalation Rules | | | Webforms | |
| | A Mara Is your Smart Chat (ChiliShara) | | | | Ask Zia 7/2 G |



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



4. Select the configure option on the Icetrak SMS extension

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|--|--|---|-------|--------|------|-----|
| Setup Admin Panel CR | M Motivator | я | • 8 • | | | |
| Setup | All Extensions Installed Updates | | | | | |
| General Users and Control Channels Customization Automation Data Administration Marketplace All Zoho Google | Visitor Tracking From disk sectionable insights. Convert your Zaho CRM data into actionable Datas Uninstal Configure Visitor State Visitor State Visit | | | | | |
| Microsoft | | | | | | |
| occupation space | | | | | | |
| Conta | Here is your Smert Chat (Chrispace) | | Ask Z | la Zić | | |
| icetrak_square.png ^ | | | | | Show | All |

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 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.

| | e Leads | s Conta | cts A | ccounts | Deals | Activities | Report | s Analytics | Products | Quote | s Sales Order | s | | All Tabs 🕶 | Q + | e | Φ |
|---|-------------------|-----------------|----------------|----------|------------------|------------|--------|-----------------|----------|-------|-------------------|---------------|---------------------------|-------------|---------------|---------------|-----|
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| | | | | | | | | | | | | | | | | | |
| | Open Tasl | ks | | | | | | | | | Todays Leads | | | | | | |
| | SUBJECT | DUE DATE | STATUS | PRIORITY | RELATED | TO CONTAC | T NAME | ACTIVITY OWNER | ACTIVITY | | LEAD NAME | COMPANY | EMAIL | PHONE | LEAD SOURCE | LEAD OWNER | |
| | Follow up call | Feb 25, 2019 | Not Started | Normal | Rebecc Mileor | a | | Support Support | Tasks | | Rebecca Milner | M&L | rmilnerØm-and- I.co.uk | 02079460811 | 6 | Support Sup | ppq |
| | | | | | Miner | | | | | | Joe Bennet | Bennet Itd | jb@jbennetItd.com | 01632960781 | 6 | Support Sup | ppo |
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| | CONTACT | NAME | ACCO | DUNT NAM | E | EMAIL PH | IONE | CONTACT OWNER | | | | | | | | | |
| | tryrtyt | | tyuty | /u | | | | Support Support | | | | | | | | | |
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2. Under the Customization section select Modules and Fields

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| | | Setup | | | | | |
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| | GENERAL | USERS AND CONTROL | CHANNELS | CUSTOMIZATION | | | |
| | Personal Settings | Users | Email | Modules and Fields | | | |
| | Company Details | Security Control | Telephony | Templates | | | |
| | Gamescope | Compliance Settings | Social | Customize Home page | | | |
| | Zia | Territory Management | Chat | | | | |
| | | | SalesSignals | | | | |
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| | AUTOMATION | DATA ADMINISTRATION | MARKETPLACE | DEVELOPER SPACE | | | |
| | Workflow Rules | Import | All | Zia Voice ^{Newl} | | | |
| | Blueprint | Export | Zoho | APIs | | | |
| | Approval Processes | Data Backup | Google | Connections | | | |
| | Schedules | Storage | Microsoft | Functions | | | |
| | Actions | Recycle Bin | | Widgets | | | |
| | Assignment Rules | Audit Log | | CRM Variables | | | |
| | Case Escalation Rules | | | Webforms | | | |
| Constant Contents | Here is your Smart Chat (Ctri+Space) | | | | Ask Zia | 24 | |

This will take you to the screen shown bellow



| → C https://crmplus.zol | io.com/icetrak/index.do#crm/org683639959/setting | s/modules | | <u>×</u>) 🛂 🗛 🔤 🕹 🛛 🎯 |
|--------------------------|--|----------------|--------------|-------------------------------|
| p Admin Panel CRM | Motivator | | | |
| etup | Modules Tab Groups Web Tabs | | | |
| eneral | C. Search | | | Organize Modules + New Module |
| sers and Control | DISPLAYED IN TABS AS | MODULE NAME | SHARED TO | * User-Created Module |
| nannels | Leads | Leads | All Profiles | February 25, 2019 |
| Modules and Fields | Contacts | Contacts | All Profiles | Rebruary 25, 2019 |
| Templates | Accounts | Accounts | All Profiles | |
| Customize Home page | Deals | Deals | All Profiles | |
| utomation | Activities | Activities | All Profiles | |
| ata Administration | Tasks | Tasks | All Profiles | |
| arketplace | Events | Events | All Profiles | |
| eveloper Space | Calls | Calls | All Profiles | |
| | Reports | Reports | All Profiles | |
| | Analytics | Analytics | All Profiles | |
| | Products | Products | All Profiles | |
| | Quotes | Quotes | All Profiles | |
| | Sales Orders | SalesOrders | All Profiles | |
| Carlan Carlana | Purchase Orders Here is your Smart Chat (Orl+Space) | PurchaseOrders | All Profiles | Asix Zia 2(s) |

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

| → C (https://crmplus.zc | ho.com/icetrak/inde | ex.do#crm/org683639959/settings/mo | dules | | 🔬 🗘 🖄 📩 🖉 |
|--------------------------|-----------------------|------------------------------------|----------------|--------------|-------------------------------|
| tup Admin Panel CRI | M Motivator | | | | |
| Setup | Modules | Tab Groups Web Tabs | | | |
| General | Q Search | | | | Organize Modules + New Module |
| Users and Control | | | | | * User-Created Modu |
| Channels | DISPLAYED IN 1 | TABS AS | MODULE NAME | SHARED TO | LAST MODIFIED |
| Customization | Leads 💮 | Layout | Leads | All Profiles | February 25, 2019 |
| Modules and Fields | Contacts | Fields | Contacts | All Profiles | February 25, 2019 |
| Templates | Accounts | Module Permission | Accounts | All Profiles | |
| Customize Home page | Deals | Duplicate Check Preference | Deals | All Profiles | |
| | Activities | Lead Status Mapping | Activities | All Profiles | |
| Automation | Tasks | Map Dependency Fields | Tasks | All Profiles | |
| Marketelace | Events | Set validation Rules | Events | All Profiles | |
| Developer Space | Calls | | Calls | All Profiles | |
| ereicher obnee | Reports | | Reports | All Profiles | |
| | Analytics | | Analytics | All Profiles | |
| | Products | | Products | All Profiles | |
| | Quotes | | Quotes | All Profiles | |
| | Sales Orders | | SalesOrders | All Profiles | |
| | Purchase On | riere | PurchaseOrders | All Profiles | |
| Cress Contacts | Here Is your Smart Ch | at (Ctrl+Space) | | | Ask Zia 20 🗎 |

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.



| | | | | | -0 | | | | | |
|-----------------|--|--|-------------------------------------|---------------|---------------|--|--|--|--|--|
| up Admin Panel | CRM MODIVATOR | | | | | | | | | |
| MODULES | C Leads | | | | | | | | | |
| Leads | | | | | | | | | | |
| Contacts | Layouts Layout Rules Validati | on Rules Fields Links and Button | ns Summary | | (? | | | | | |
| Accounts | Lead Conversion Mapping | | | | | | | | | |
| Deals | Map all the fields of lead module to the | lap all the fields of lead module to the fields in account, contact or deal modules. Based on the mappings here, the lead information will be transferred to account, contact or deal unoversion | | | | | | | | |
| Products | conversion. | | | | | | | | | |
| Quotes | | | | | | | | | | |
| Sales Orders | Mapping Information | ACCOUNT | CONTACT | DEAL | * Custom Fiel | | | | | |
| Purchase Orders | Annual Revenue | Annual Revenue | -None- | -None- | | | | | | |
| Invoices | City | Billing City | * Mailing City | -None- | Ţ | | | | | |
| Campaigns | | | | | | | | | | |
| Vendors | Country | Billing Country | Mailing Country | * -None- | v | | | | | |
| Price Books | Created By | -None- | + -None- | -None- | - | | | | | |
| Cases | Created Time | -None- | * -None- | * -None- | | | | | | |
| Solutions | Description | | | | | | | | | |
| Visits | | Description | * Description | • Description | · · | | | | | |
| | | | Seve Cancel | | | | | | | |
| | | | | | | | | | | |

- 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

| up Admin Panel | CRM Motivator | | | | | | |
|------------------------|--------------------|------------------|---|------------------------------------|----------|--------|---|
| | mouned by | -None- | ¥ | -None- | ¥ | -None- | × |
| MODULES | No of Employees | Employees | * | -None- | * | -None- | |
| Contanto | Phone | Phone | ¥ | Phone | * | -None- | |
| Accounts | Rating | Rating | * | -None- | • | -None- | - |
| Deals | Lead Image | -None- | ÷ | -None- | | -None- | |
| Products | Salutation | -None- | × | -None- | ¥ | -None- | ~ |
| Quotes Sales Orders | Secondary Email | -None- | - | Secondary Email | + | -None- | |
| Purchase Orders | Skype ID | -None- | ¥ | Skype ID | • | -None- | ÷ |
| Invoices | * SMS Migration ID | -None- | × | -None- | ÷ | -Note- | ~ |
| Campaigns | * SMS Opt Out | -None- | - | Q. Other Province | • | -Nore- | - |
| Vendors Price Books | Province | Billing Province | | Other Street | • | -None- | Ţ |
| Cases | Street | Billing Street | | Other Postal Code SMS Migration ID | <u> </u> | -None- | - |
| Solutions | Twitter | -None- | | Test Single Line | • | -Note- | Ţ |
| Visits | Mada-Ba | | | | | _ | |
| | | | | Cancel | | | |

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.

| d SMS | | | | \times |
|------------------------------------|---|--|---|--|
| | Icetrak Se | end SMS | | |
| er your message here | | | Sub | mit |
| aracters Remaining: 160 | | 11 | | |
| selected: 3 e: 1 ber: 1 1 | | | | |
| | | | | |
| | d SMS er your message here aracters Remaining: 160 selected: 3 e: 1 ber: 1 :1 | d SMS Icetrak Se er your message here aracters Remaining: 160 selected: 3 e: 1 ber: 1 1 | d SMS Icetrak Send SMS er your message here aracters Remaining: 160 selected: 3 e: 1 ber: 1 1 | d SMS Icetrak Send SMS er your message here aracters Remaining: 160 selected: 3 e: 1 1 |

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3. 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)

icetra

| | Icetrak Send SM | S |
|---|-----------------|---------------------|
| Enter your message here | | Submit |
| Characters Remaining: 160 | 11 | |
| Total selected: 3 endable: 1 | | |
| Total selected: 3 endable: 1 o Number: 1 pt Out: 1 | | |
| Total selected: 3 endable: 1 o Number: 1 pt Out: 1 Name | Mobile | Status |
| Total selected: 3 endable: 1 o Number: 1 pt Out: 1 Joe Bennet Debhere Miener | Mobile - | Status No Number |

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.

4. 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. Nu cursus elit. Morbi quis eros eget turpis rutrum ullamcorper et lorem. Duis pon dui | ınc eu quis | Su |
|--|----------------|----|
| | | |
| Characters Remaining: 7 Message submitted | li li | |



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 or call us on $01684\ 568672$