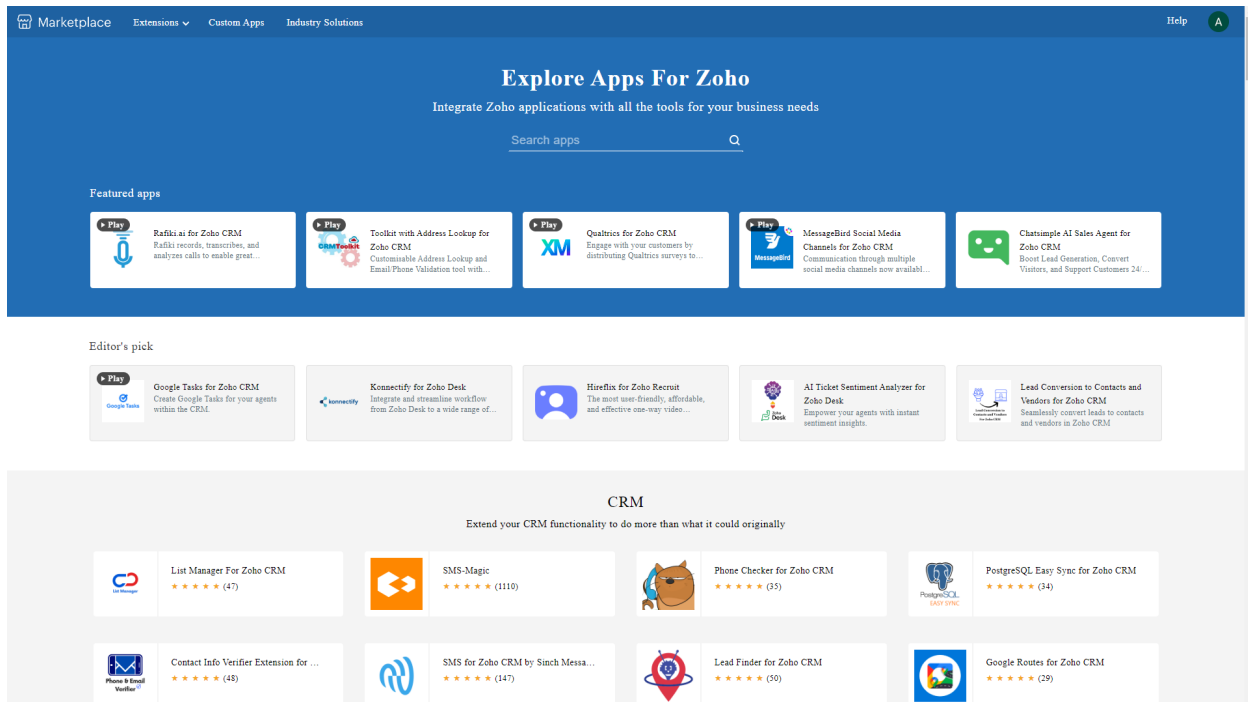


Foindr Extension User Guide

Installation Guide

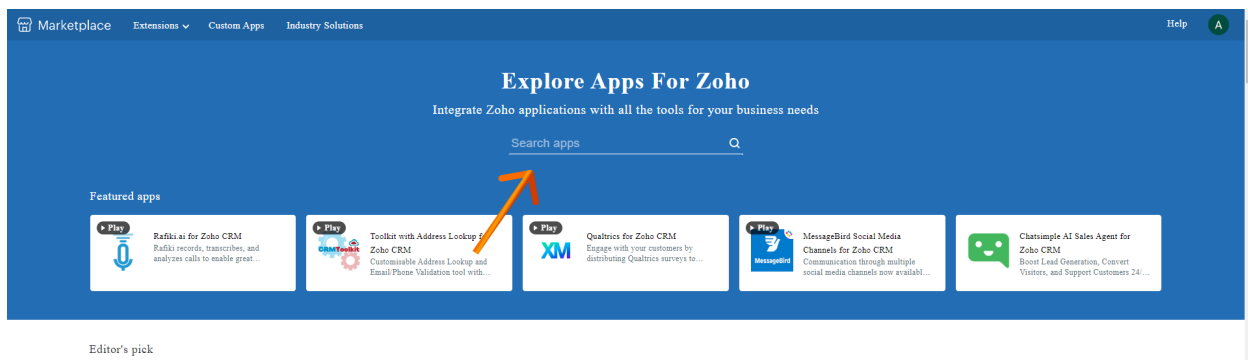
Step 1: Access Zoho Marketplace

1. Log in to your Zoho CRM account.
2. Click on the "Marketplace" icon located at the top right corner of the dashboard.

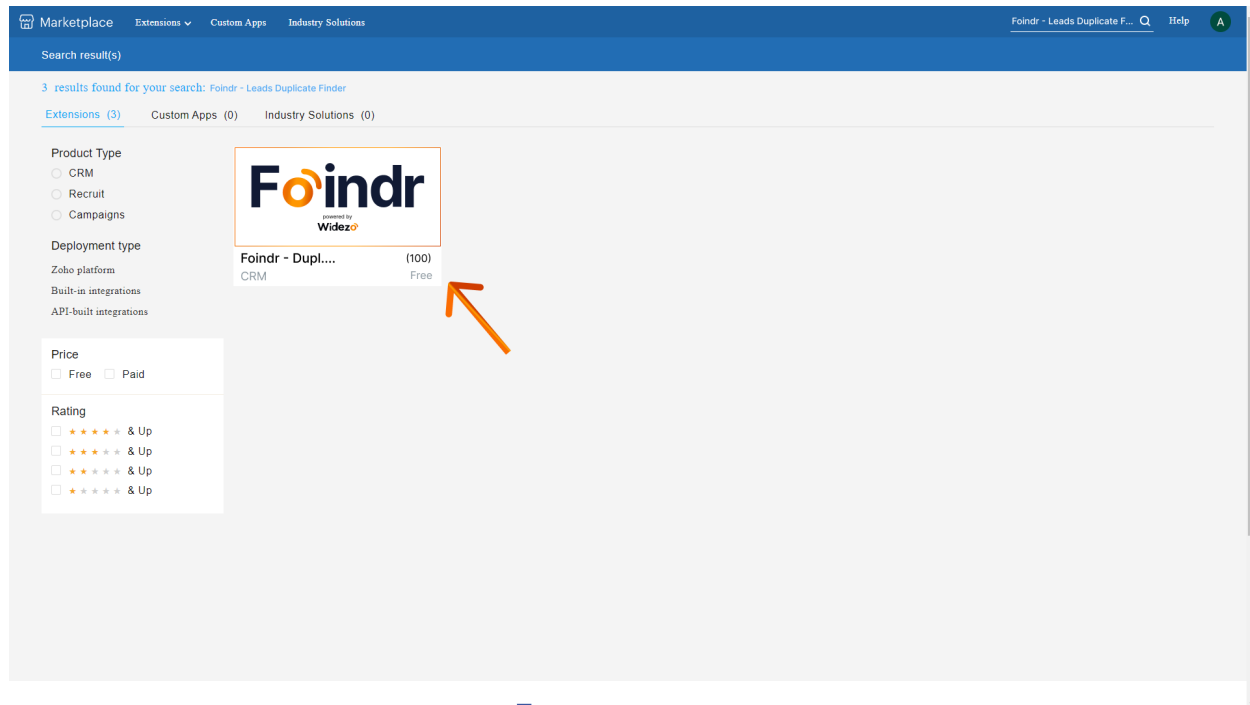


Step 2: Search and Install Foindr

In the Zoho Marketplace, search for "Foindr."



2. Click on the "Foindr" extension from the search results.



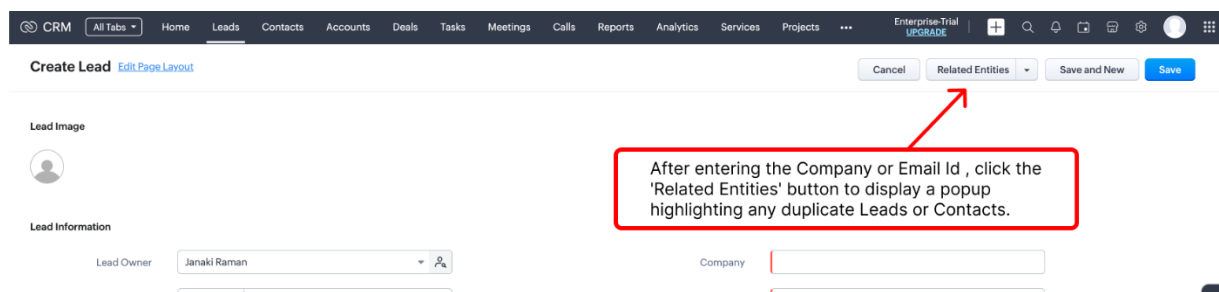
3. Click the "Install" button.

Step 3: Grant Permissions

1. Review the permissions requested by the extension.
2. Click "Accept and Install."

Step 4: Post-Installation Setup

1. Once installed, navigate to the Foindr settings page in Zoho CRM.
2. Configure the initial settings such as notification preferences and modules to check for duplicates.



CRM

All Tabs

Home

Leads

Contacts

Accounts

Create Lead [Edit Page Layout](#)

Lead Image

Lead Information

Lead Owner

Janaki Raman

First Name

-None- Lily

Title

Phone

Mobile

Lead Source

-None-

Industry

-None-

Annual Revenue

\$

Email Opt Out

☐

Related Entities

Existing Contacts

Name	Email	Account	Mobile	Phone
Janaki Raman	janakiraman.v+0200@zohotest.com	Account one	-	1234567890

Existing Leads

Name	Email	Company	Mobile	Phone
Lily Wang	lilywang@zohotest.com	Test Account	-	-
Janaki Account one	janakiraman.v+0200@zohotest.com	Account one	-	-
Janaki Account one	janakiraman.v+0200@zohotest.com	Account one	-	-

This is the duplicate lead that matches with the entered email id. Also, Foindr will filter out any leads/contacts that matches with the entered email domain/company name.

Enterprise-Trial

UPGRADE

Cancel

Related Entities

Save and New

Save

Client Script

Here is your Smart Chat (Ctrl+Space)

Ask Zia

26

CRM

All Tabs

Home

Leads

Contacts

Accounts

Create Lead [Edit Page Layout](#)

Lead Image

Lead Information

Lead Owner

Janaki Raman

First Name

-None- Lily

Title

Phone

Mobile

Lead Source

-None-

Industry

-None-

Annual Revenue

\$

Email Opt Out

☐

Related Entities

Existing Contacts

Name	Email	Account	Mobile	Phone
Janaki Raman	janakiraman.v+0200@zohotest.com	Account one	-	1234567890

Existing Leads

Name	Email	Company	Mobile	Phone
Lily Wang	lilywang@zohotest.com	Test Account	-	-
Janaki Account one	janakiraman.v+0200@zohotest.com	Account one	-	-
Janaki Account one	janakiraman.v+0200@zohotest.com	Account one	-	-

This is the duplicate lead that matches with the entered email id. Also, Foindr will filter out any leads/contacts that matches with the entered email domain/company name.

Enterprise-Trial

UPGRADE

Cancel

Related Entities

Save and New

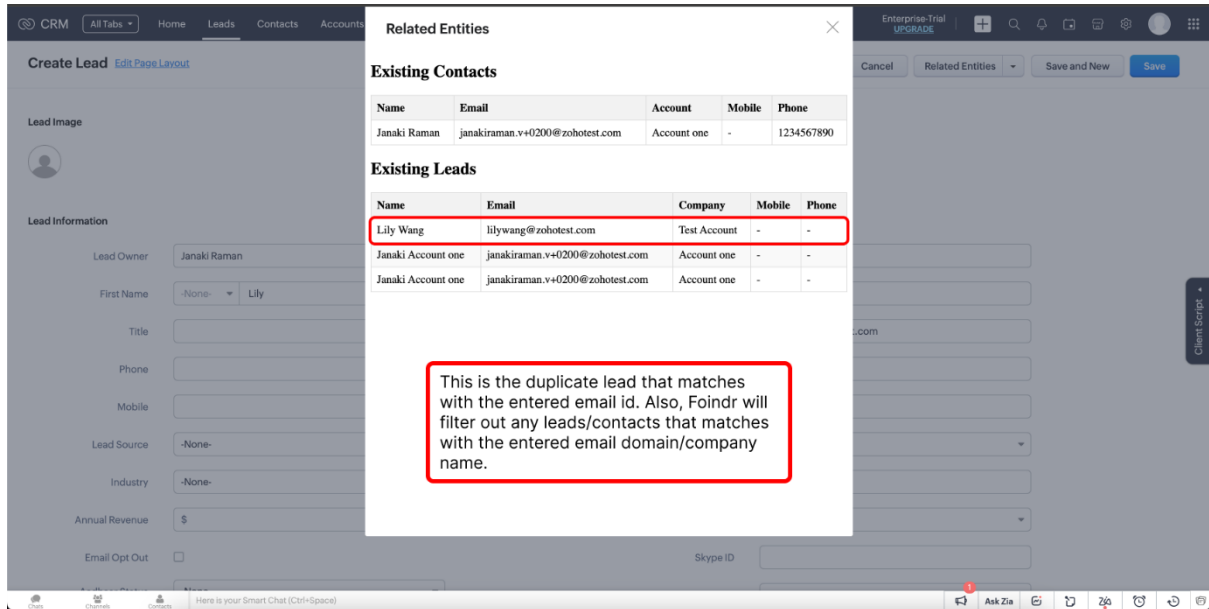
Save

Client Script

Here is your Smart Chat (Ctrl+Space)

Ask Zia

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Configuration and Setup

Initial Configuration

Notification Setup:

1. Navigate to 'Settings > Foindr Settings'.
2. Configure how and when you want to be notified about duplicate records.
3. Click "Save."

Duplicate Check Settings:

1. Select the modules where Foindr should check for duplicates (e.g., Leads, Contacts).

2. Choose the criteria for identifying duplicates (e.g., email address, phone number).

3. Click "Save" to apply the settings.

Usage Guide

Creating Records

1. When creating a new record, Foindr will automatically check for duplicates based on the configured criteria.

2. If duplicates are found, a pop-up notification will alert the user with details of the potential duplicates.

Viewing Duplicate Records

1. Navigate to the Foindr tab in Zoho CRM.

2. Review the list of identified duplicates across modules.

3. Take action on duplicates (merge, ignore, or review details).