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NO 35 C. 5th cross street,
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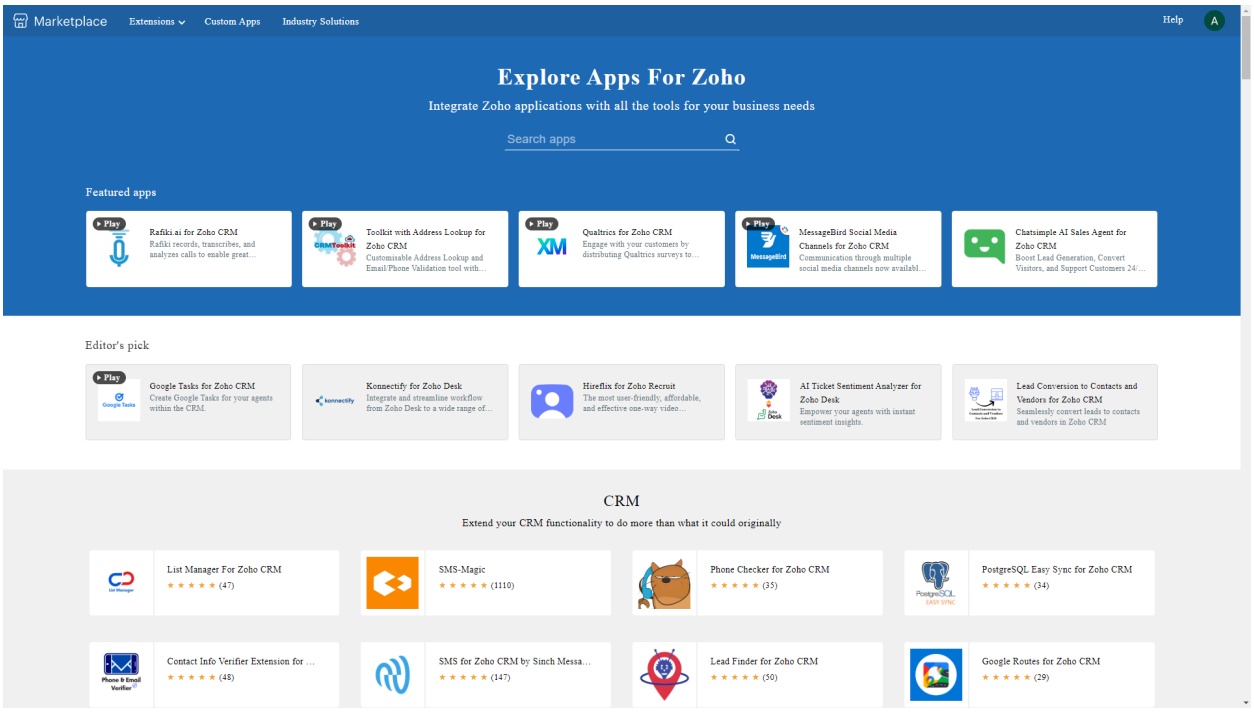
Foindr Extension User Guide

Installation Guide

Step 1: Access Zoho Marketplace

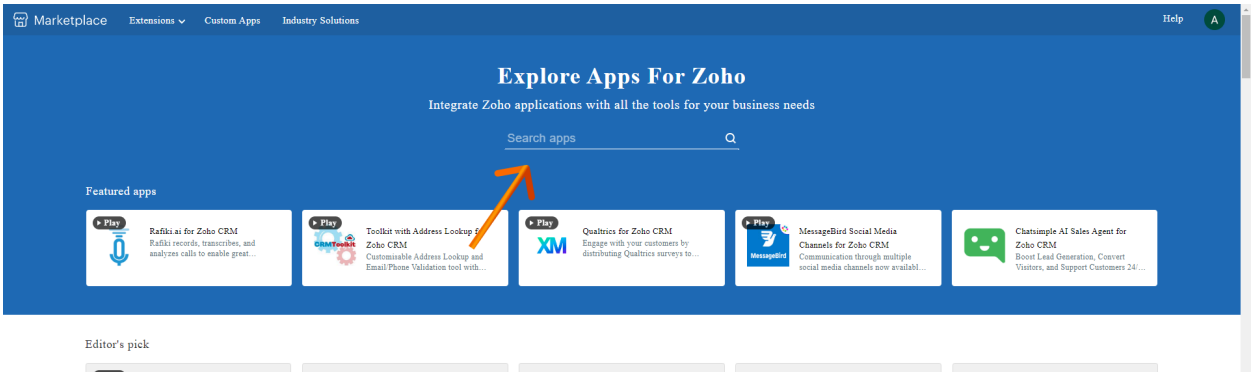
1. Log in to your Zoho CRM account.

2. Click on the "Marketplace" icon located at the top right corner of the dashboard.



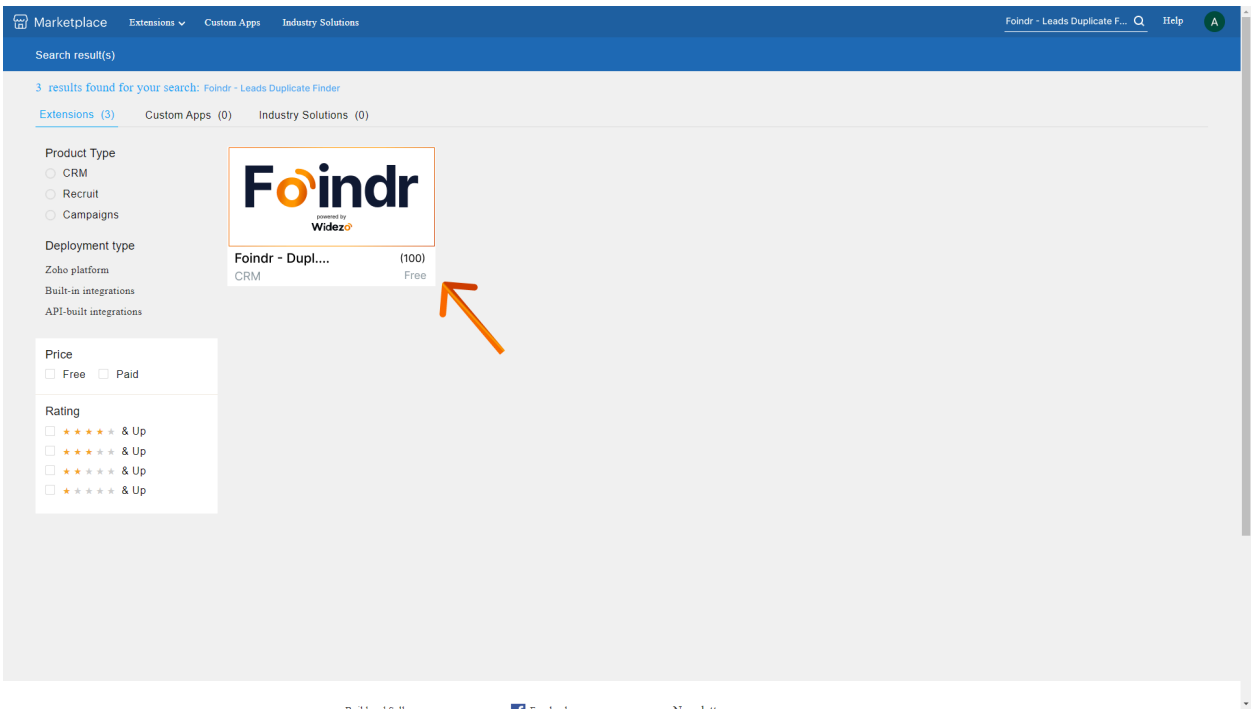
Step 2: Search and Install Foindr

In the Zoho Marketplace, search for "Foindr."



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



3. Click the "Install" button.

Step 3: Grant Permissions

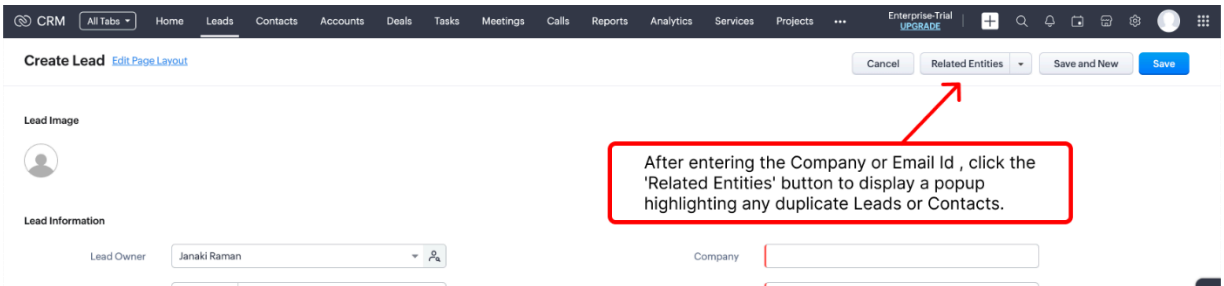
1. Review the permissions requested by the extension.

2. Click "Accept and Install."

Step 4: Post-Installation Setup

1. Once installed, navigate to the Foindr settings page in Zoho CRM.

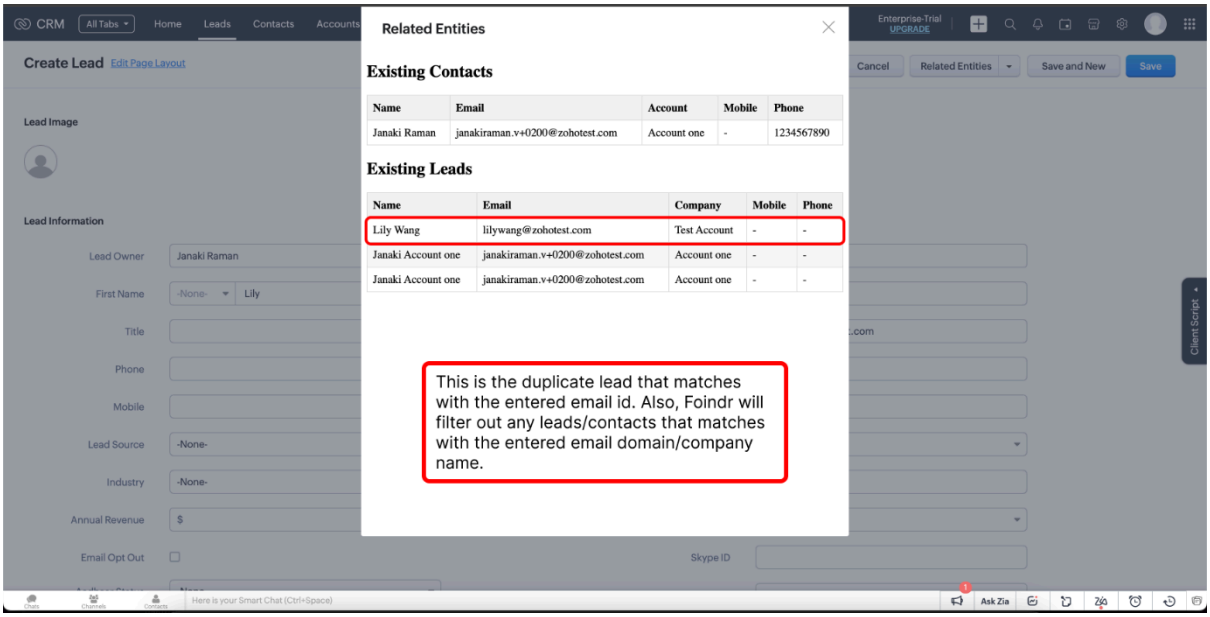
2. Configure the initial settings such as notification preferences and modules to check for duplicates.

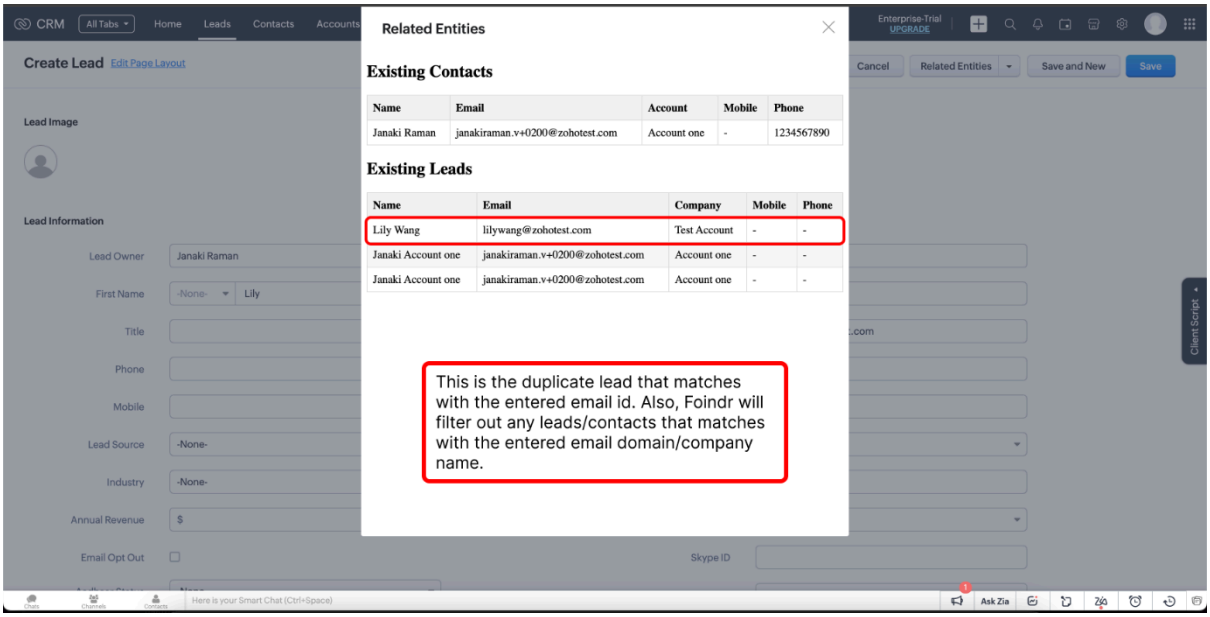


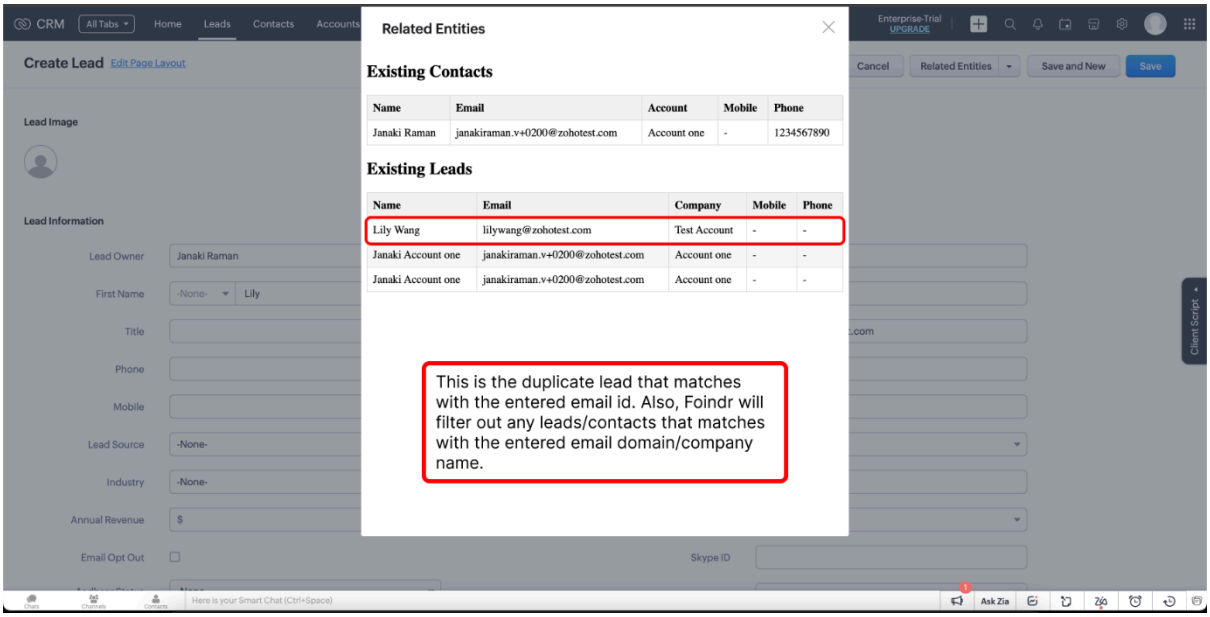
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Configuration and Setup

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).