



Google Maps Extension for ZOHO CRM



User Manual

Version 1.0

Prepared By:



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Google Maps Extension – Zoho CRM: User Manual

1. Overview

Google Maps is a web mapping service developed by Google. It offers satellite imagery, aerial photography, street maps, 360° interactive panoramic views of streets (Street View), real-time traffic conditions, and route planning for traveling by foot, car, bicycle, air (in beta) and public transportation.

Using this extension Zoho CRM user’s can find the exact location and distance of nearby leads/accounts/contacts/vendors.

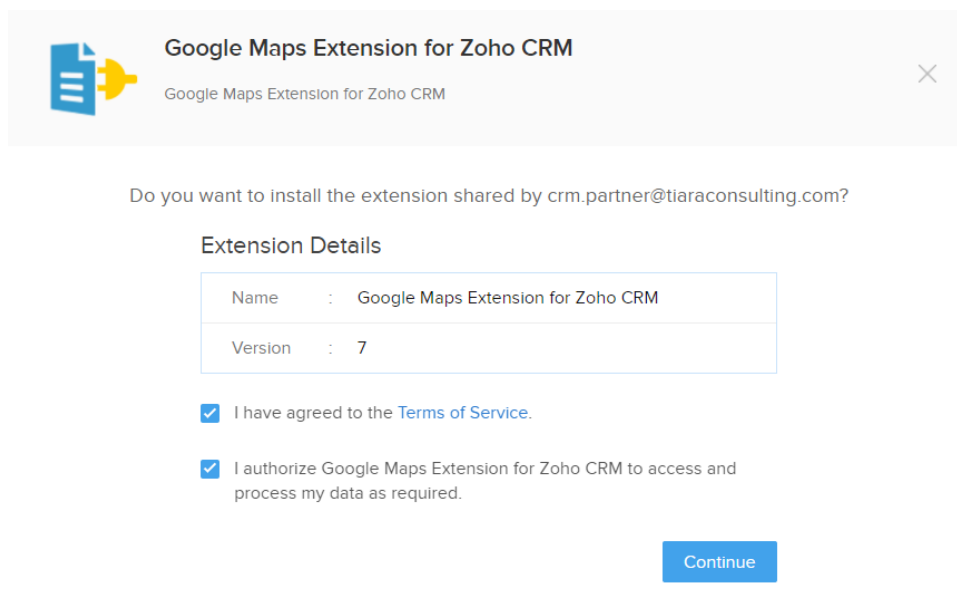
This User Manual document provides step-by-step instructions to install this extension from Zoho Marketplace, how to configure and use the Google Maps Extension within your Zoho CRM account.

1.1. Install the GOOGLE Extension

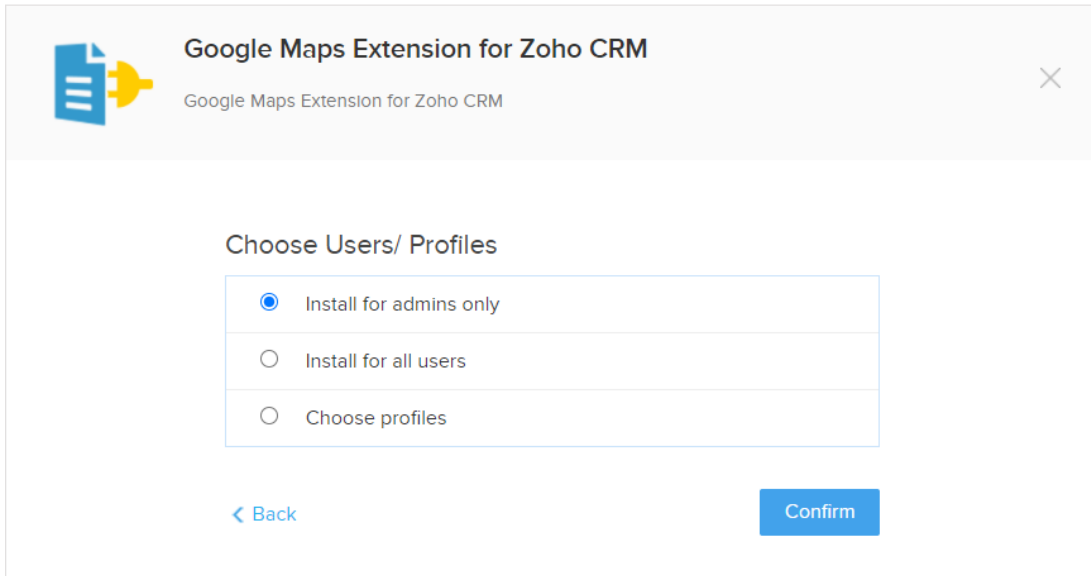
Go to [Zoho Marketplace](#) and search for “Google Maps” to locate the extension and install directly from the Marketplace. Alternatively, you can install the Google Maps extension by logging in to your Zoho CRM account and follow the below installation instructions.

To install the GOOGLE 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 **Google Maps**, 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**.



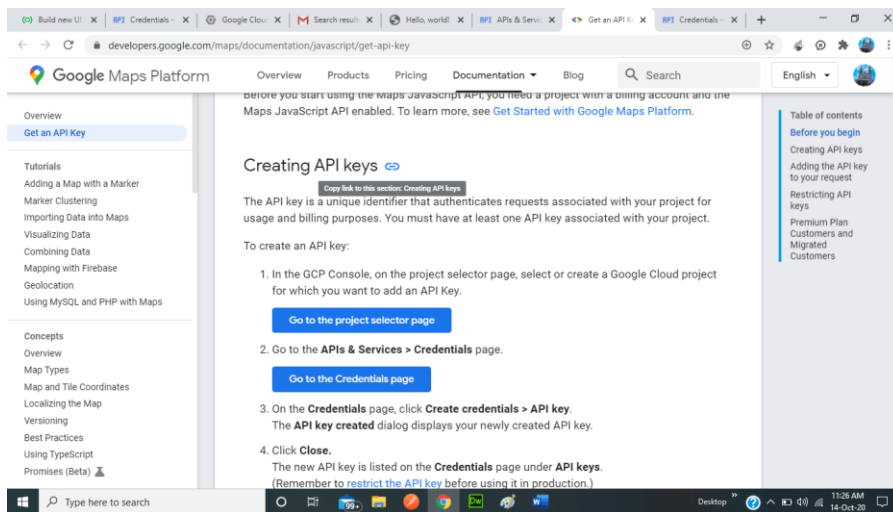
- ❖ Select one of the Profile of Users for whom you want to install the extension and click **Confirm as shown in the screenshot below**



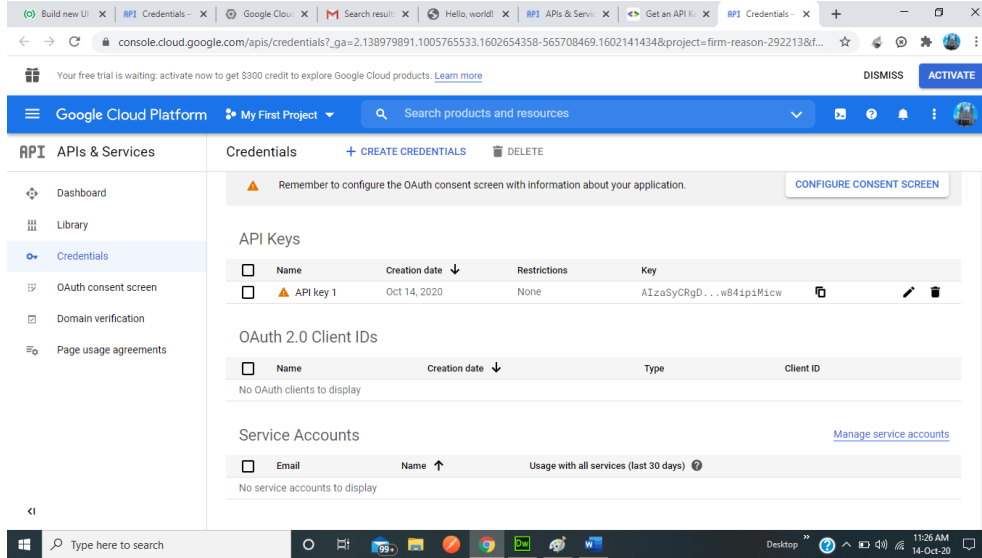
1.2. Get the Google Map API Key (mandatory)

To get the Google Map API Key, follow the below steps.

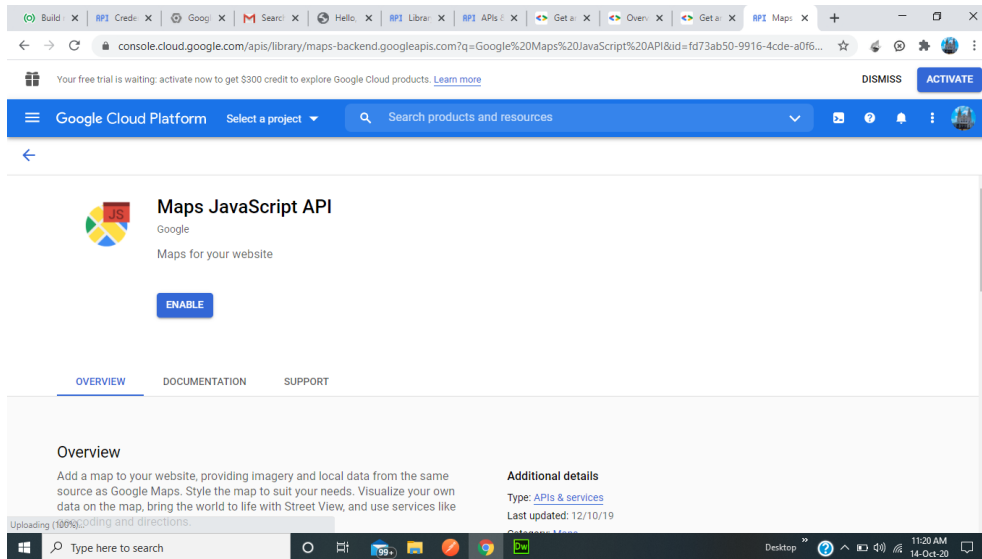
Step 1 : Visit <https://developers.google.com/maps/documentation/javascript/get-api-key>



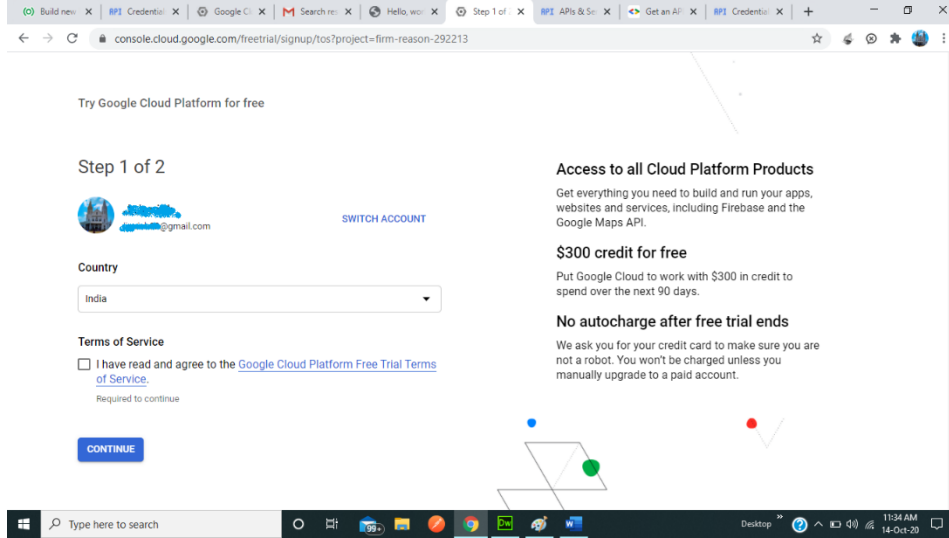
Step 2: Click on the button called “Go to the Credentials Page”



Step 3: Enable the API Key by visit here <https://console.cloud.google.com>



Step 4 : Enable the Billing Account in Google Cloud
https://console.cloud.google.com/project/_/billing/enable



2. Google Maps Extension - Settings

2.1. Google Maps API Key

The main feature of Google Maps Extension is to locate the address in Google Map. For this purpose, Google will provide an API key to access it’s map services. To get the Google Map API Key please refer section 1.2

User must need to save their Google Maps API Key to use this extension.

2.2. Vendor Module Settings

In “Search Vendor Module” feature, the following fields are display in default.

- 1) Vendor Name
- 2) Vendor Phone
- 3) Vendor Email
- 4) Vendor Address
- 5) Distance of Vendor from the selected Lead/Account/Contact

In addition, if the user required more fields, then need to select the fields and save in settings.

The settings Panel screenshot shown below,

← Google Maps Extension for Zoho CRM - Settings

Google Maps API Settings

Google Maps API Key

Save

Google Maps Extension Vendor Module Settings

Fields

8 selected ▾

Select all

Vendor Name

Phone

Email

Website

Category

GL Account

Created Time

Save

Selected Fields	
1. Vendor Name	2. Phone
3. Email	4. Street
5. City	6. State
7. Zip Code	8. Country

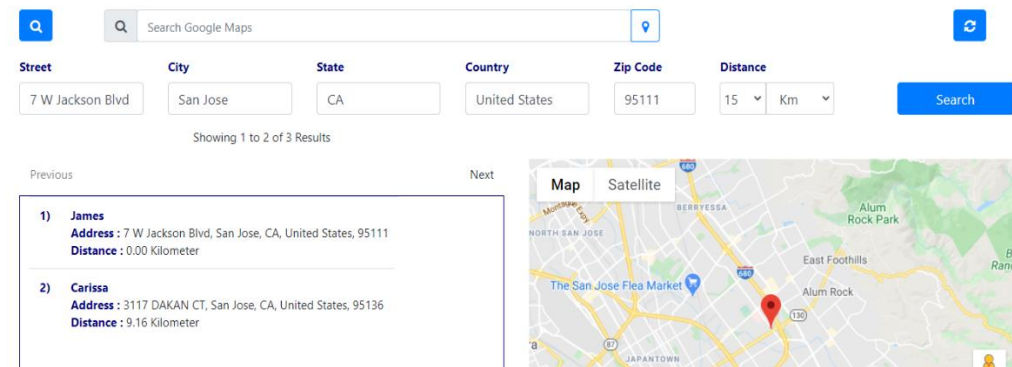
3. Search within Module

This is one of the features of Google Maps Extension, to access this feature, user need to click the button called “Search within Leads/Accounts/Contacts/Vendors” in List view of each Leads/Contacts/Vendors Module.

User can search the nearest leads/accounts/contacts/vendors of selected lead/account/contact/vendor by distance and it locates the result’s address in the Google Map.

Also, the user can search nearby leads/accounts/contacts/vendors by his/her current location or different address. But it works well if the following points are satisfied

- ❖ Zipcode is mandatory
- ❖ Exact address with Zip Code will provide better search



Distance calculation will work only when the selected Lead/Account/Contact/Vendor and the Leads/Accounts/Contacts/Vendors in the searched results are having latitude and longitude values.

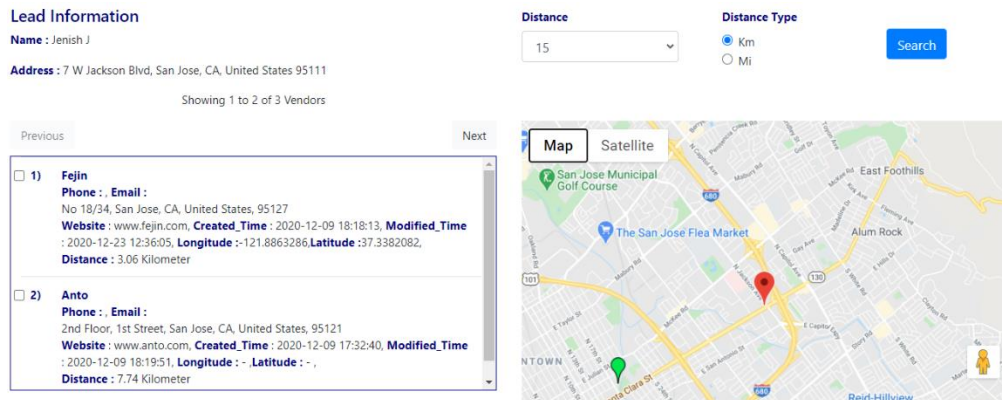
Note: Latitude and Longitude values are updated in the respective records when the records are created or edited in the Leads/Accounts/Contacts/Vendors module (Address fields like Address, City, State, Country, and Zip Code should be filled.)

4. Search “Vendor” Module

This is another important feature of Google Maps Extension, to access this feature, user need to click the button called “Search Vendor Module” in List view of each Leads/Accounts/Contacts Module.

User can search the nearest Vendors of selected lead/account/contact by distance and it locates the result’s address in the Google Map.

User can associate the vendors against the selected Lead/Account/Contact. For this user need to select the result records and click “Save”.



User can't able to select the vendor if the vendor already associated against the selected Lead/Account/Contact.

Distance calculation will work only when the selected Lead/Account/Contact and the fetched Vendors in the searched results are having latitude and longitude values.

Note: Latitude and Longitude values are updated in the respective records when the records are created or edited in the Leads/Accounts/Contacts/Vendors module (Address fields like Address, City, State, Country, and Zip Code should be filled.)

Default Fields in the display panel are,

- 6) Vendor Name
- 7) Vendor Phone
- 8) Vendor Email
- 9) Vendor Address

10) Distance of Vendor from the selected Lead/Account/Contact

If the user needs more information about the vendor, then need to select the required fields and save using extension's settings.

5. Associated Vendors

It is a custom module that is created while installing the Google Maps Extension. It is for to list the associated vendors against the Lead/Account/Contact by using this extension. It having various fields including Lead/Contact/Accounts and Vendor Lookup's

Note : Google Maps Extension for Zoho CRM is currently works properly only for the United States

6. Support Contacts for Google Maps Extension – Tiara Help Desk

Thank you for installing GOOGLE Extension. If you have any questions or facing installation issues, please contact Tiara Support Desk for Zoho Extensions via email at zohosupport@tiaraconsulting.com or call us at **(925) 218 4080**.
