PathFinder in Zoho CRM - Help documentation



Help Documentation

IMPORTANT NOTE:

This document is intended for the users participating in the **Early Access Program of PathFinder**. Kindly do not share or reproduce externally without written permission of Zoho Corporation Pvt. Ltd.



Table of Contents

PathFinder - An Overview	3
Discover paths taken on your business and orchestrate a favorable journey	7
Discover Journey to optimize product placement for a retail store	8
Assess user behavior in a retail store	9
Components of PathFinder	
States	
Configuring States	
Touchpoints	
Configuring Touchpoints	
Identifiers	
Configuring Identifiers	
Track the Journeys	24
Generate analytical reports based on paths observed using Variables	
Interpreting the reports of PathFinder	
Path Report	27
Sankey Report	
Journey Report	

PathFinder - An Overview

As technology advances, customers are expecting personalized attention and on-demand solutions for their problems—in other words, a great customer experience.

However, your business infrastructure being a complex maze, how do you formulate relevant and contextual CX strategy that resonates with your customer expectations at each juncture?

The first step is to **understand your customers** and **discover their journey** within your business.

Getting a comprehensive idea of who your customers are and how they interact with your business landscape reveals a lot about their experience. The interactions they have with your business are like breadcrumb trails. Tracing them will help you understand their travel, their behavior, their response, and their experience.

In business terms, each of your prospects approaches your business with different goals and they access different touchpoints available in your business. They will complete their journey, get stagnated in a stage, or even drop their interaction all together. While there could be multiple reasons as to why they behave in a certain way, the primary mode of finding them all is by mapping their journey with your business.

So, how do you map journeys?

The conventional way to create customer experiences is to think up various fictional personas and goals based on the popular transactions and simulate their behavior and journey. They chart down presumed experience and emotions at each stage and formulate different offerings that could cater for their timely needs. It could look something like this:

Customer Journey Map Zylker Audio and Acoustics



Sarah Brooks NEWPROSPECT 32, Female, Business Blogger, Freelance Content Marketer Purchase Goal:

Buy Microphones and suitable accessories to aid her podcasting adventure.

Expectations:

- Hassle-free shopping experience
- · Bias-free guidance in product selection
- Best pricing and deals



*Hypothetical interpretation/ representation by collating survey responses

This is the sort of journey map, businesses have been creating for a long time to understand customer behavior and tailor customer experience. As you can see, this map is hypothetical in nature and the interactions are not realistic. For an extensive understanding of your customer behaviors and to make real changes, you need a systematic tool that can generate paths based on real time interactions.

PathFinder in Zoho CRM is a tool built to capture live interactions with your business as signals and record them as unique paths, also known as journeys. It depicts the paths in three different graphical reports, to comprehend the observed journeys better.



These reports will unveil all the paths taken in your business and help you infer different findings at once.

For example, a completed path could indicate an accomplished journey, a broken path could indicate the presence of roadblocks or pain points, or a looped path could indicate the visitor is reconsidering their decision. This is why it's important for businesses to identify their path or route, including how they travel, where they are getting stagnated, which paths are popularly used, or even which paths are unused. With insights like these, you can:

- Optimize the quality and responsiveness of your touchpoints
- Identify, resolve, or remove unproductive touchpoints
- Discover your customer personas and patterns
- Develop cross-selling and up-selling sales targeting strategies
- Design, orchestrate, and streamline your process based on the customer behavior
- Manage your (marketing) spends on the right touchpoints
- Orchestrate personalized and contextual customer experience at each step of their journey
- Connect and facilitate cross-channel journeys through different products
- Proactively arrest customer churn or drop-outs happening during the journey

Availability

PathFinder is available for **Enterprise** and **Ultimate** editions only.

Limits on the number of new records that PathFinder can capture based on edition:

- **Enterprise**: Upto 50,000 records per day across all processes.
- **Ultimate**: Upto 1,00,000 records per day across all processes.

Limits on the number of transitions performed based on edition:

- **Enterprise**: Upto 1,00,000 transitions per day across all processes.
- **Ultimate**: Upto 2,00,000 transitions per day across all processes.

Permission Required

Users with the **Administrative** profile can access this feature.

Let's explore different scenarios PathFinder could be used:

Discover paths taken on your business and orchestrate a favorable journey

Scope: Examine, optimize, and streamline an existing process with PathFinder

Zylker & Co. is a national bank offering a wide range of products, services, and tools for their personal banking consumers. To reduce their manual efforts in their operations, they'd like to automate and orchestrate their lead generation, qualification, and conversion process with an equal eye for CX. However, to streamline a process that will be relevant to the consumers and the business, they have to identify how their prospective consumers are onboarded in the first place. You can understand from the case that the business is trying to streamline an existing process. While it may vary case to case, PathFinder can help find the average "actual picture" of the process and connect all the data points such that they can orchestrate a robust process using Journey Builder. See also: <u>Orchestrate journeys using Journey Builder</u>.

					-
These -	Core in service		Has	and the second se	
and Recently in the set of the set	Control of Addressed instruments			NORGHTELIK (NEW, WEAK TORCIDER	
and fair - Malao national	Opiniquesting			Name of Carlos and Carlos	
nai Be-Faul arraige	Chaing Institute for The Destinant Paul			Ennaly M. Censephters: Complex Salph Carone Find	
anterense accounter	Calaria of the submost			Diel Deschleier, Roberts Marin Dieleren	
	Second Pages service ages			Cond Partice Description of Congress (Colorson)	
ngi En inin manand (year	Receiving and Head https://www.environ.env	anna Rantar	6	han th	
and generative vectors	Scienced Mit pass suprement Conference			Noticed County Institut Reservation	
and an owner of the stat	den en e			nas (1) etc.	
and Day between strate				and the set of the set of the set	
of functions becau					
and Radio area (but					
and Real and a state of a st					
	Name of the second seco				
	- See	Server			
	0.0100010	8/96			
	BOOM	8/5/			
r pallink rat	Granited Application excitant		B Subsection R Industry	legioniti Larties. Taite Holio.(ne)	
el Convineix	Convert of a result in Lands strategy.			Surface and Social Andrews, Ranks	
	Lead Management Setar Overview Resons			Cantor Stream, Frind Las Halles, Market	-
-	Lead Management Setus Overview Assorts Prits Sarkey Xoursey			innerinna (frai ya kato), kitar	0
+	Lead Managoment Setar Overview Resetts Puth Sarkey Journey			torenergen, friet zu riene walde, fan er	De fugi -
-	Land Management Setur Overview <u>Resent</u> Pr(N) Sarkey Journey Fitter Signals By	Path		toreness freitrans Mala Sono" 300 Pecenta	fer Frigo = he
-	Lead Management Setu Ovniver Resen Prite Spas By Q Seech	Path 1 Lad Ger-Dathauel Enal	· Las Garturins Intel - Las Connects - Constitution	innersen (nie jung kala) 1997 Rosen (ni	Per Fuge = h
÷	Land Management Sets Device Resen Prite Spars By Q Sanch - Lard Gen Ostbaset Find - Spatchetter - Sanch	Path 1 Los Gao Cathaord East 1 Re-spatial Los - Los	· bar Gastrutes Inst · bas Coveries · CorasCostes	Tannon Mula Mark	fer frage =
+	The Same of the Same Same Same Same Same Same Same Sam	Path 1 Lad San Cutsued Envil 1 Recyalited Ladri - Joo 1 Carbon Containe	 bar Garllution fragi + barl Coversion + Corras/Cradier Coversion + CoverCradier 	tanonen frei sutan kak, kan i	fer Fuge = Be
+	Ended Management: Seate Onriview Print Sarakey Asseme Print Sarakey Asseme Print Sarakey Asseme Consol for a seate of the s	Pails I Lod Gan-Cuthoud Evel I An-qualifield or I feel Control Dension L Lod Cont Presiumength	* [Last Guilfurties Teal] + [Last Coversion] + [Coreas Condise] Coverson + [Coreas Condise]	Sannan Mula Mark	E Per Fuge = B
ŕ		Pab 1 Lod Ge- Cuthurel Evel 1 ReceaseMail.co. / Joo 1 Gover to censure 1 Lod Ge- Confurcement 1 Lod Ge- Confurcement	 Las Queltudos Desti + Las Coversos + Ocras Conster Conso + Constructudos Las Queltudos Dusti + Las Coversion + Const Conster 	Internet Prisonne Prisonne 1900 Report	Der Frege = Be
ŕ		Path 1 Lood Can-Cathour Event 1 Annyaal Maridon - Jool 2 Control Continue 4 Control Continue 1 Control Can-Continue agent 2 Control Continue 1 Lond Can-Continue agent 2 Lond primative of control control	LoarQuatturiss drag + [and Coversion] + CorractCouble Control Couble LoarQuatturiss drag LoarQuatturiss drag LoarQuatturiss drag LoarQuatturiss drag	Sanchen Mit, Mark	C Per Fuge = Be
		Path I Lad Gan Cathound Eval Requiring the second eval Cathound Evaluat Lad Gan Cathoung the second evaluat	Load Genthardson Energy + " band Committion - " Contract Constitute Contract Constant Load Quartification-Constant Load Quartification-Const + " Load Constantion" + " Contract Constantion Load Quartification-Const + " Load Constantion" + " Contract Constantion Load Quartification-Const + " Load Quartification - " (Load Quartification-Const + -) (Load Quartification-Const +) (Load Quartification-Const +) (Load Quartification-Const +	Internet Pristan Bio, Mar 1908 Board M	for hop =
ē		Path	Las Garturis test - Las Connis, - Corac Coste Conn Coste Conn Coste Las Garturis Cost - Las Conneis - Catac Coster Las Garturis Cost - Las Conneis - Catac Coster Las Garturis Cost - Las Conneis - Catac Coster Las Coster Las Coster La	Samman (Sain Sain) 300 Recentl Samman)	Der Frage = Ber
ţ.		Park		Somenson - Constitutional	Per Fage - B
ţ.		Path Lad Can Cutsusel Fuel Lad Can Cutsusel Fuel Cancer cutsus Cancer cutsus Lad Can Crastamyage Lad genetics at the cut	Exam Qualification Creation Each Conversion Contrac/Constant Exam Qualification/Creation Exam Qualification	Internet Alfred Skiel, Mark	C Per Figo + h
÷		Path I Lod Gan Cashavat Evel Annya Shara (San Cashavat Evel Annya Shara (San Cashavat Evel Cashara Gan Charlana (San Cashavat San Cashavat San Charlana (San Charlanaa (San Charlana (San Charlana (San Charlana (San Charlana	Loui Guellaufonia degi - Loui Doversio - OrazoCondia Loui Guellaufonia - Loui Doversio - OrazoCondia Loui Guellaufonia - Loui Guessio - Conscionator Loui Guellaufonia - Loui Guessio - Conscionator Martinia - Loui Guessio - Conscionator Loui Guellaufonia - Loui Guessio - Conscionator Loui Guellaufonia - Contactonia	Internet And State State Internet And State State State Internet And State Sta	fer freg =

This document contains confidential information intended for the use of internal recipients only. Kindly do not share or reproduce externally without written permission of Zoho Corporation Pvt. Ltd.

Discover Journey to optimize product placement for a retail store

Scope: <u>Track customer journey, strategize cross-selling with PathFinder</u>

Zylker.com is an online electronic shop that sells a range of products to cater various domestic technology needs. For the ease of convenience, they have categorized their products under different sections - storage, mobile devices, computing devices, networking, and accessories.

As you can see, these products are a right fit to buy as a combo. However, they are struggling to discover which combination shall be coupled for best traction. While they can always track their best-selling product, one thing they need is to know how their prospects are choosing that particular product. It's important to understand what their original goal was when they entered the site, which product did they access the rest of the products in the cart from, what initiated the navigation, and so on. PathFinder can help them identify this journey of visitors between different products.



The objective of Zylker.com is to identify popular paths and recommend best-selling products as a combo.

Inference:

• Laptop is the product often sought, and visitors are looking for a mouse in many of their journeys after they have looked at a laptop. Coupling or suggesting these two products, will be a strategic cross-sell. The same goes with a mouse and headphones.

There is also an observation: Visitors who search for a landline phone are considering mobile device and accessories.

Assess user behavior in a retail store

Scope: <u>Understand and decipher customer behavior</u>.

Zylker.com is a novel online electronic store, trying to understand the behavior of visitors on their site.They'd like to understand how visitors moves through their site, in order to decide upon UX strategies, targeted sales, how to allocate marketing spends, and more.

As a platform, they have multiple touchpoints that users access in no particular order, including:

- Sign up to the site
- Subscribe to the newsletter
- Explore products
- Email with an enquiry
- Start a chatbot conversation
- Check eligibility
- Use tools on the site to check the product dimensions virtually
- Add products to wish lists
- Remove products from wish lists
- Add products to cart

- Explore the blog
- Take up a quiz
- Choose between different payment aggregators
- Choose a desired method of payment

PathFinder can analyze all types of journeys taken on their site and report them using graphical interpretations. At any point, if there is an unproductive or stagnant touchpoint, they can remove or correct it before it causes loss to the business.



Thus, the basic algorithm of PathFinder is to capture signals and connect them to form a path. It can identify any paths or process observed in your business. What makes the difference is your objective and the configuration you make.

Components of PathFinder

A journey is a non-linear path that varies from one customer to the other. Although the elements present in your business are the same for all customers, the route they take to complete their transaction is often unpredictable. PathFinder in Zoho CRM help you capture and trace activities of multiple customers at a time.

To enable PathFinder, you need to configure three important components:

- **Touchpoints** Interactions users have with your business, captured as **Signals**.
- States Stages present in your business that users access in their desired order.
- **Identifiers** Unique parameters to **identify users** each time they access and resume their journey with your business.

← Lead Management Draft (Versio	n1 • Ø	Delete draft. Save and Track - +++
Q Search States	Contact Creation - Touchpoint	Mark as end state
Lead Gen Inbound downl Content	Touchpoint Create of a record	
Load gen Inbound - Webform	Module Contacts	
Lead gen inbound - Chat IQ	Layout Any Layout	
Lead Gen- Inbound- email	Identifiers Contact Name Email Last Name Mobile Twitter	
Lead Qualification- Survey	Add Criteria	Identifiers
Lead Qualification-Email	Add another Touchpoint	
Lead Qualification-Call		
Lead qualification - research		
Pre-gualified Lead		
Lead Conversion		
Contact Creation		
Add State		

Let's look at them in detail!

States

States are independent steps or stages that customers use to navigate across your business. They act as milestones that could indicate users' progress in your business.

For example, logging in to the website, wish-listing a product to the favorites, adding the product to the cart, and completion of payment are different actions you can configure as steps, which when your customers click, will be connected to form a path. If a customer logs in to your website and adds the product to the cart without wish-listing them as favorites, then only the states - *Log in* > *Added to cart* > *Payment completion* will be connected as a path.

In PathFinder, once all the states are laid down, you can discover the possibility of multiple journeys in one shot, analyze and compare each journeys, and optimize the customer experience based on the findings.

Configuring States

Because states define the path you are willing to discover, it is important that you have an objective for the type of path you need.

- You can configure **products** as states and track the overall commute across your site. (example: Smartphone, laptop, printer, etc.). Refer to this example (*Discover Journey to optimize product placement for a retail store*) to understand how products can be used as states.
- You can configure **steps** as states and monitor the interaction on your site at a process level. (example: Saved to favorites, added to cart, trying out the size guide, etc.). Refer to this example (*Discover paths taken on your business and orchestrate a favorable journey*) to understand how steps can be used as states.
- You can configure them both to explore an extensive journey across your business.

Tips:

• List all the stages available in your business. All the stages you think your users might use.

If your business offers multiple products or services, you can create multiple states for each product to track the journey at a granular level. For example, if Smartphone is one of the offerings, then you can configure the following as states:

- **•** Smartphone Adding to Cart
- **Smartphone Comparison**
- Smartphone Value exchange
- **Smartphone EMI**
- **Smartphone Payment completion**

Likewise, you can ascribe states for different products and services.

To configure States,

- 1. Go to **Setup > Process Management > CommandCenter > PathFinder**
- 2. Click the **Configure PathFinder** button.

PathFinder				100
PathFinder listens to various touchpoints across c	hannels and depicts the customer's i	ourney	Corres	🗊 He
			Cor	nhgure PathEinder
PathFinder Name	Current Records Count	Last Modified Date	Status	
NewGen Insurance cover path	7	🗿 Apr 13, 2022		
Journey Monitoring	0	👰 Jul 21, 2022	Draft	
	PathFinder Name NewGen Insurance cover path Journey Monitoring	PathFinder Name Current Records Count NewGen Insurance cover path 7 Journey Monitoring 0	PathFinder Name Current Records Count Last Modified Date NewGen Insurance cover path 7 Apr 13, 2022 Journey Monitoring 0 Jul 21, 2022	PathFinder Name Current Records Count Last Modified Date Status NewGen Insurance cover path 7 Apr 13,2022 CO Journey Monitoring 0 Image: Jul 21,2022 Draft

3. In the *Configure PathFinder* popup, provide a name for the PathFinder and a description, then click **Create PathFinder**.

Configure touchpoi PathFinder map out	nts that are involved in your customer's lifecycle and let the customer journeys for you.
PathFinder name	Journey Monitoring
Description	
	Cancel Create PathEinde

4. On the configuration page, click **Add State**.

← Journey Monitoring ∅	Delete draft Start Inspiring :
	Add States and track the customer journey Each State defines a particular milestone in the customer's journey. Configure the State along with one or more Tochpoints for customers to enter this State.

5. Provide a name and description for the state, then click **Save**.

Description The first visit to the site from all channels will be gathered in this state	State Name	Entering the site
	Description	The first visit to the site from all channels will be gathered in this state

This document contains confidential information intended for the use of internal recipients only. Kindly do not share or reproduce externally without written permission of Zoho Corporation Pvt. Ltd.

6. To add another state, click **Add State** from the left pane.

Add State			
Q. Search	ney Monitoring 🖉		Delete draft Start tracking
Entering	he site	itate Name Description	Subscribing to the newsletter When the visitor subscribes to the newsletter, the touchpoint will be triggered and the path will be connected to this state.

Notes:

- You can configure up to **50 states** in a PathFinder configuration.
- States are individual entities that are connected by the journey users take. Unlike JourneyBuilder or Blueprint, the order of the state configured doesn't indicate the actual order that user might take.
- You can also **mark a state as an end state**; upon reaching this state, the record will quit itself out of PathFinder. Marking a state as an end state will indicate the goal of the customer is accomplished. If the same user comes back or accesses more on the website, a new journey will be commenced.

terre to an angle stating to an annual			
Q. Inanh	Contact Creation	C Alerta an and state	
Land Gen Inbound down Conkent	Total bookst: Create of a record		
Lookgen integral - Weblana	Mudula Centana		
Land gov inhourd - Clott IQ	Lorent Applacent		
Losd Gen-Telecard remail	Inerthers Designation Table Lot No.	er Nick Siter +	
Linio Qualification Survey	Ead Management		
Lase Qualification-Entrol	Setup Oversitov Reports		
Lead Qualification- Call	Path Sarkey Journey		d) Baltering
Land a utilication - research		163 Recents Per Pag	
	Filter Signals Dy	nut End State	Record Court
Pro-qualified Lost	Q.Sonh	1 Journal Galaxies Field + Journal Galaction Final + Journal Galaxies + Cartan Galaxies	30
Loof Creversies	 Last Gen - Outboard Enail + Teachpoint - Producement - 1 + Producement 	I Pre-castRed.com + LastConversion + Cantat Druster (B)	. 45
Contact Disalion Bromer	🗇 Boc	1 Corvet Cristian (b)	u
Addams	Bounce Record Bounce Torre	Lond Gos - break consigno	18
		• Institutionary in the quartering in the construction in the construction of the cons	- 44
	🖂 tan	A Los (presenter and secret sell Los (Creck Record result	12
	No. of Children No. of Children	7 Loss Ges International Content: • Loss permitted without • Loss Cavillance Graft • Loss Convenion • Cantact Creation	24
	🗇 let ly	Load gest tabainal - Watcharts	
	Sert France	1 Lastgeetssand-Webkern (Ne-qualited last) Gast Coversion (Constructionation R)	ы
	🗆 Sert 76 🖂 Serte	0 lostpritesad-Carl) + lostQuikainoiral + lostCourtar + ConstCourse (B)	

Touchpoints

Touchpoints are user interactions in your business. Every time a user interacts with your business, the interaction triggers the corresponding touchpoint to connect the user record with the respective state.

For example, opening an outgoing email, receiving an incoming call, creation of a record, receiving an API, conversion of a record, edit of a record, are all user interactions with your business. If you receive an incoming call, this interaction will be logged as a touchpoint and corresponds the user to the respective state.

Configuring Touchpoints

Touchpoints are module-based triggers and you can configure a touchpoint based on your objective. For example, if you determine a state for lead generation, then all lead generation activities like submission of a webform, Opening of an email, Receiving an incoming email, etc., can be configured as different touchpoints.

For a more specific analysis, you can use criteria for each touchpoint for a more targeted capture of signals.

Entering the site	The first visit to the site from all channels will be gathered in this state
Subscribing to the newsletter	Touchpoint Submission of a webform
Adding to wishlist	Module Leads
Add to Cart	Webform Download Gated Content *
Compares products	Identifiers Email Last Name Mobile Phone Twitter Limit reached
Method of Payment - ETM	Remove Criteria
Method of Payment - NetBanking	
Method of Payment - COD	Add another Touchpoint

To configure Touchpoints

- 1. Go to the *PathFinder* you have created and click on the state you want to configure the touchpoint for.
- 2. Click **Add Touchpoint** and select the desired touchpoint from the drop-down.

← Journey Monitoring ∅	
Q Search	Entering the site
Entering the site	The first visit to the site from all channels will be gathered in this state
Subscribing to the newsletter	Add Touchpoint
Adding to wishlist	Q Search
Add to Cart	Receiving an API call Receiving a custom signal
Compares products	Convert
Method of Payment - ETM	Create of a record
Method of Payment - NetBanking	Edit of a Record Submission of a webform
Method of Payment - COD	

3. Select the **Module** and its related information, then add identifiers and criteria as desired.

loachpoine	Submission of a webform	*		
Module	Select Module	•		
Webform	-Select Webform-	*		
Identifiers	Choose Identifiers	*		
and Cathoode	Maximum 5 identifiers are allowed			
iou criteria	Touchpoint Submission of a	a webform		
	Module Leads			
	Webform Download Ga	ated Content	*	
	Identifiers Email La	st Name Mobile	Twitter Phone	•
	Limit reached	0		
	Add Chiena	Touchpoint	Create of a record	•
		Module	Leads	•
		_		
		Layout	Any Layout	•
		Layout	Any Layout Choose Identifiers	•

This document contains confidential information intended for the use of internal recipients only. Kindly do not share or reproduce externally without written permission of Zoho Corporation Pvt. Ltd.

4. Repeat this process for all states.

Notes:

- For each state, you can configure up to **five** touchpoints.
- If you have more than five touchpoints, you can create another state and accommodate the new touchpoints in there. However, you cannot use the same name for the state.

State Name	Compares products
	State name should be unique.
Description	
	Cancel

• A state cannot be empty. A minimum of one touchpoint for each state is required to start tracking.

R, Search	Adding to wishlist
Entering the site	When any product gets wishlisted, the action will comprehend this state.
Subscribing to the newsletter	Add Touchpoint At least one Touchpoint has to be configured.
Adding to wishlist	
Add to Cart	
Compares products	
Method of Payment - ETM	
Method of Payment - NetBanking	
Method of Payment - COD	
and a second as a second second	

• The email-related touchpoints will be displayed for users with the new email integration. Click <u>here</u> for more information.

Identifiers

Identifiers are unique parameters that identify your users as they enter your business. Identifiers recognize these users whenever they resume their journey. This is an important aspect, as it determines the accuracy of the paths.

For example, mobile number, last name, date of birth, email address, Twitter handle, and website are among different fields that could denote a visitor.

Configuring Identifiers

Identifiers are the fields present in each module in your CRM. As the movement of a user could be across different states, to connect them with each other, you need to choose fields whose values are mutual with modules present in the subsequent states.

While the order of the states are plotted based on user movement, the question of identifying common factors between two states becomes evident. Let's explore how they can be configured.

As a business, you might be aware of all the process available to create and convert leads and the touchpoints applicable at each stage. However, you might not know how these elements are being used by your users. Considering this factor, PathFinder allows you to configure up to **five** identifiers for each touchpoint. Based on the buyer's cycle, you can recognize the modules that might be involved with a particular state and spot the fields that could be common between two states.

For example, let's assume your objective is to discover lead conversion in your business. To know how leads are generated, how they are qualified, and how they are converted, you can configure:

- **States** based on the steps involved in your lead management process: lead generation, lead qualification, lead nurturing, lead conversion, and contact creation.
- **Touchpoints** based on the avenues through which interactions happen during these stages; submission of a webform, clicking on an email campaign, receiving an incoming call, clicking an outgoing email, conversion of a record from leads module, and creation of a record in contacts module.
- **Identifiers** can be common fields present.
 - Submission of a webform is a touchpoint that is related to the lead generation process. The identifiers can be user information like last name, email address, mobile number, twitter handle, and record ID.
 - **Clicking on an email campaign** is another touchpoint related to lead generation.

The identifiers can be campaign ID, email address, and campaign subject. Here, the above touchpoints have different triggers, assigned to the same state, Lead Generation, and the same module, Leads. As you can see, email address is a common identifier, the value of campaign ID and record ID points to the same record.

 Conversion of a lead record is another touchpoint that indicates lead conversion. The identifier that is configured here will relate to the fields present in the contacts module. This is where you have to take caution. You will need to verify the fields you have configured as identifiers from the leads module are present in the subsequent contacts module too.

Tips:

PathFinder considers the value of the identifier fields to form a path, such that between two states or two touchpoints, you can use different fields whose value could be overlapping.

Let's assume:

• Lead Generation is a state > Creation of a record in Leads module is a Touchpoint, then Identifiers can be Mobile, Last name, email address phone number, and/or Record ID.

	2 site	Mark as end sta
ne first visit te	o the site from all channels will be gathered in this state	
Touchpoint	Submission of a webform	
Module	Leads	
Webform	Q1 FY'22 Zylker Real Estate L *	
Identifiers	Email Last Name Mobile Twitter Phone	
Add Criteria	Limit reached	
Touchpoint	Create of a record	
Module	Leads	
Layout	Any Layout	
	Applicant Id Email Last Name Mobile Twitter	
Identifiers		

• Lead conversion is a state > Convert of a record from Leads module is a touchpoint, then the identifiers can be the same as above: Mobile, Last name, email address, phone number, and/or Record ID.

Lead Conver	sion	Mark as end state
Touchpoint	Convert	
Module	Leads	
Identifiers	Applicant Id Twitter Last Name Mobile Email	
	Limit reached	
Add Criteria		

As you can see, the touchpoints in both the case are from same module/ layout so that the same identifiers can be used. If you would like to track a path between two modules, then the fields present in one module may not be available in the other module. In this case, you can

• Choose the fields that could carry common value like **Last name** and **Contact Name**, such that the contact name contains values present in the last name field.

Contact		Mark as end state
Touchpoint	Create of a record	
Module	Contacts	
Layout	Any Layout	
Identifiers	Contact Name Email Mobile Twitter Contact Id	
	Limit reached	
Add Criteria		

To configure Identifiers for a touchpoint:

1. Click on **Identifiers** and select the desired unique fields from the drop-down.

Fouchpoint	Create of a record 👻	
Module	Leads 👻	
Layout	Any Layout	
Identifiers	Email Last Name Mobile	
Add Criteria	Spouse Name State	
dd another To	Street	
	Twitter	
	Unsubscribed Mode	
	Website	

Notes:

- Based on the module chosen during the touchpoint configuration, PathFinder autopopulates relevant identifiers. You can either retain them or update them with your desired fields.
- The identifier "**Record ID**" will appear only when update of a record is chosen as a touchpoint.
- Record ID act as a coordinate to denote a record which is not a "visible field" in your CRM. You can use Record ID as an identifier for touchpoints configured for the same module.

Track the Journeys

Once you have completed configuring States, Touchpoints, and Identifiers, it is time you start tracking journeys.

• For a newly created PathFinder, you can click **start tracking** button.

← Journey Monitoring Ø				Delete draft	Start tracking	
Q Search	Invoice Gene	eration			🗹 Mark as e	and state
Entering the site	Touchooint	Receiving an API call				
Subscribing to the newsletter	i de copone	https://crm.localzoho.or	om/crm/AutomationTrigger?digget=e			
Adding to wishlist		9de2b3c5ac8d94ceefa 3551a09bfaadc5	f7594ac78cbee2609d51f4132b0b01			
Add to Cart		Name	Data Type			
Compares products		Complete	String			
Method of Payment - ETM	Identifiers	Complete	*			
Method of Payment - NetBanking	Add Criteria	Maximum 5 identifiers are allowe	র			
Method of Payment - COD	Add another To	puchpoint				
Invoice Generation End state)					

Once you start tracking, you can validate your configurations from the **Setup**

Overview.

			Delete draft Edit Save and Track +
All States +	ates * Listen to signals Filters		Identifiers
Entering the site	Submission of Q1 FY'22 Zylker Real Estate Lead Import Form webform		Email, Last Name, Mobile, Twitter, Phone
	Creation of Applicant in any layout		Applicant Id, Email, Last Name, Mobile, Twitter
Add to Cart	Creation of Applicant in any layout		Email, Last Name, Mobile
Invoice Generation Endstate	Receiving an API call https://crm.local2oho.com/crm/AutomationTrigger?dig est=c5578/270b5226566ebe8041na05acbf6601ae1a8 8371212231c831218061acef		Complete
	Name Data Type Complete String		
Lead Conversion	Convert of a record in Leads module		Applicant Id, Twitter, Last Name, Mobile Email
Contact	Creation of Contact in any layout		Contact Name, Email, Mobile, Twitter,

• You can also edit an active PathFinder by clicking the **Edit** button.

			Delete draft Edit Save and Irack +
All States +	Listen to signals	Filters	Identifiers
Entering the site	Submission of Q1 FY'22 Zylker Real Estate Lead Import Form webform		Email, Last Name, Mobile, Twitter, Phone
	Creation of Applicant in any layout		Applicant Id, Email, Last Name, Mobile, Twitter
Add to Cart	Creation of Applicant in any layout		Email, Last Name, Mobile
Invoice Generation Endstate	Receiving an API call https://crm.localzoho.com/crm/AutomationTrigger?dig est=c55579270b5226565ebe0041n05acbf6601ae1a8 8371212231c831218061acef		Complete
	Name Data Type		
	Complete String		
ead Conversion	Convert of a record in Leads module		Applicant Id, Twitter, Last Name, Mobile, Email
Contact	Creation of Contact in any layout		Contact Name, Email, Mobile, Twitter, Contact Id

• Once you have updated the configuration, you can either save the updated configuration as a new version and track like a new rule, or override the existing configuration.



Generate analytical reports based on paths observed using Variables

In addition to the PathFinder reports, you can also extract records that follow a certain path with the help of variables.

Variables are fields used in your touchpoint configuration, which you can use as a denominator and classify your record database based on the paths.



Interpreting the reports of PathFinder

PathFinder captures the journeys observed in your business and maps them as three types of graphical reports:

- Path
- Sankey
- Journey

Note:

All three reports represent the same findings.

Path Report

The Path report represents the journeys as a sequential diagram. It lists down all the paths taken by customers as unique iterations along with the number of customers that used that path.

Setup Overview Repo	rts		
Path Sankey	Journey	100 Records Per Page	 C Refres 1 - 17
Filter signals by		Path	Record C
Q Search here		1 Site Search Results	1
		2 Site Search Results + View Products + Add to Cart + Site Search Results + Add to Cart + Make Payment	1
		3 Site Search Results + View Products + Add to Cart + Abandon Cart + Cart Reminder email clicked + Ad	166
		4 Site Search Results + View Products + Add to Cart + Add to Cart Failure	32
		5 Site Search Results + View Products + Add to Cart + Proceed to Checkout + Add Address + Guest Login	207
		6 Site Search Results + View Products + Add to Cart + Proceed to Checkout + Add Address + Check out	505
		7 Site Search Results + View Products + Add to Cart + Proceed to Checkout + Add Address + Check out	48
		8 Site Search Results + View Products + Add to Cart + Proceed to Checkout + Add Address + Check out	205
		9 Site Search Results + Add to Cart + Make Payment + Check out + Make Payment + Payment Success	1

At a glance, you can understand the type of journeys taken in your business and which journey was the most popular or common, giving you cues to orchestrate the journey and optimize the touchpoints.

For example, from the above image, you can come up with the following inferences:

- About 505 visitors took the journey: Site Search Results> View Products > Add to Cart > Proceed to Checkout > Add Address> CheckOut.
- The path: Site Search Results> View Products > Add to Cart > Proceed to Checkout > Add Address, has been common for most visitors.
- There are **32 visitors** for whom adding products to cart failed, indicating a roadblock.
- About **166 visitors** who abandoned the cart, are salvaged by the reminder email.
- Most of the visitors are brought in from the site search results highlighting an opportunity to optimize the search results.

• One user **added more products to the car**t through site search results twice. Likewise, you can find different analyses based on the journeys. Also, to conduct a focused analysis based on states or touchpoints, you can filter the report using the advanced filter.

Filter Signals By
Q Search
 Single Variables
Entering the site > Touchpoint - Webform submission - 1 > WebformName
 Contact > Touchpoint - Create - 1 > CreatedRecord
 System Defined Fields
Current state
Current State Entered Time
Duration To Reach Current State
Instance id
PathFinder Start Time
Status

Sankey Report

The scope of PathFinder is essentially to study the flow of users in your business platform and Sankey is a chart that visually depicts the journey. It is a funnel chart that indicates how users are traveling from one state to another using different colors and varying saturation levels. While the color denotes the state, the gradient denotes the concentration of the visitors between different stages.



From the above image, you can understand that

- Most of the users are accessing your business through the **site search results**.
- A few visitors have removed the products and added them back to the cart indicating reconsideration or upgradation of the product.
- The ratio of visitors started the journey is not equal to the number of visitors at the end
- Most of the paths are divulged at the checkout stage, either with different options or due to technical failure.

• A few visitors who had to change their address and shipping method, are required to circle back to the checkout step. Simplifying this roundabout will save visitor's time and enhance the experience.

Note:

- These reports display only the 12 months' data.
- The report is always current and is an accumulation of data or behavior so far.
- The colors ascribed to the states are system-generated and are not editable.
- The gradient in Sankey is a blend of the corresponding states.

Journey Report

A journey report is a replica of the CommandCenter orchestration. It is a flow diagram with states represented as stages and paths represented as arrows. It uses nodes and arrowheads to indicate the direction of the travel.



From the above image you can see that:

- Site search result is how 1710 visitors entered the site
- About 30 visitors' journey is curtailed by failure in the add to cart action
- The following states Payment Failure, Cart Reminder, Abandon Cart, and Remove From Cart had no interaction and thus are inactive. These types of states can be removed from the PathFinder configuration. If it is something like a product or a step in your business, it is an indication that the state is unproductive.

Notes:

- For this is a replica of your CommandCenter configuration, we allow you to export this report as .png to take reference and design your journey, there on.
- If you have an extensive journey, you can use the navigation guide to have a quick preview of the whole journey.



To view reports:

- 1. Go to **Setup> Process Management> CommandCenter> PathFinder**.
- 2. You can access the reports:
 - When you hover over the PathFinder configuration in the list view.

athFinder athFinder listens to various touchnoints across channels and depicts the customer's lourney.				
	8 8 89			Configure Pathrinder
PathFinder Name	Current Records Count	Last Modified Date	Status	
NewGen Insurance cover path	7	Apr 13, 2022		
D Journey Monitoring	0	🗿 Jul 25, 2022		View reports
				CD

• When you click on the PathFinder whose reports you want to view and click **Reports**.

PathFinder in Zoho CRM - Help documentation

Thank You!