



PathFinder
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.



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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 Zyker Audio and Acoustics



Sarah Brooks NEW PROSPECT
32, Female,
Business Blogger,
Freelance Content Marketer

Purchase Goal:
Buy Microphones and suitable accessories
to aid her podcasting adventure.

Expectations:

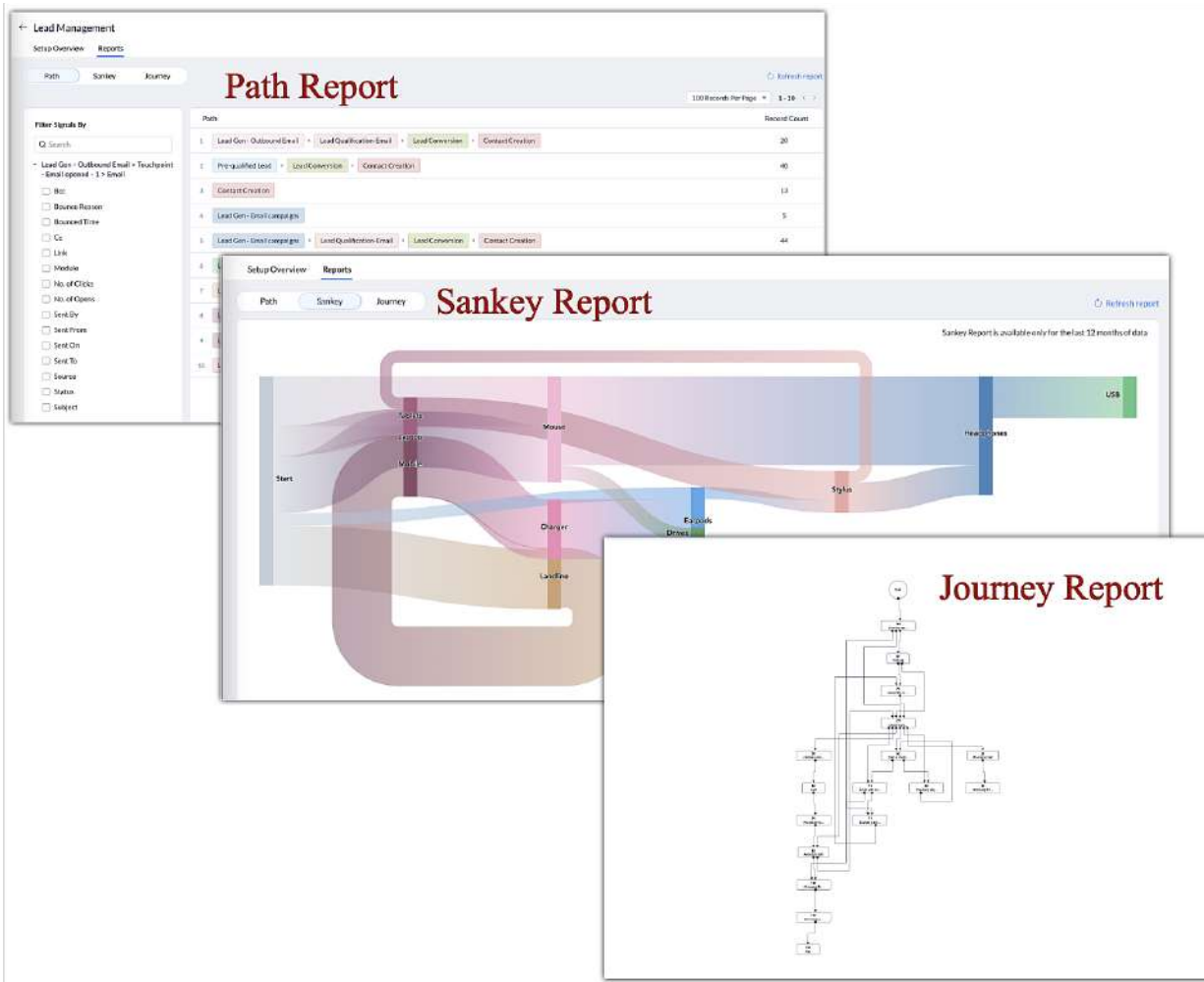
- Hassle-free shopping experience
- Bias-free guidance in product selection
- Best pricing and deals

Buyer Stage	Awareness/Discovery	Evaluation/Consideration	Decision Making	Purchase	Advocacy/Loyalty
Customer Actions/ Prompts	<ul style="list-style-type: none"> • Searches on SERPs • Clicks on paid ads • Discovers the social media posts 	<ul style="list-style-type: none"> • Downloads brochures • Invokes a chat in the site • Explores different products • Contact agent with queries • Reads reviews • Ask doubts/ questions in the Q&A 	<ul style="list-style-type: none"> • Compare Products • Look for suitable accessories • Validates compatibility • Adds to wish-list • Moves to cart 	<ul style="list-style-type: none"> • Add Billing and shipping info. • Apply coupons • Choose payment method • Choose payment aggregators • Pay 	<ul style="list-style-type: none"> • Leaves a review • Receives a complimentary gift • Shares referral code • Returns for more purchase
Access points/ Touchpoints available	<ul style="list-style-type: none"> • Paid ads on SERP • Paid ads on social media • Affiliate blog mention • Cross-marketing channels 	<ul style="list-style-type: none"> • Webform submission • Chatbox provision • Toll-free number • Customer questions portal • Website-products • Email 	<ul style="list-style-type: none"> • Comparator tool • Product assistant bot • Favorites • Cart 	<ul style="list-style-type: none"> • Info. collection page • Coupon entry • Payment page <ul style="list-style-type: none"> a. Online Banking b. Cash on delivery c. Credit card d. Debit Card e. EMI • Aggregators <ul style="list-style-type: none"> a. PayPal b. Square c. Stripe 	<ul style="list-style-type: none"> • Review page • Email response • Affiliate blogs • Survey links • Social Media
Emotions	<ul style="list-style-type: none"> • Open for suggestions/ options • Hopeful 	<ul style="list-style-type: none"> • Going through products • Confused on selection • Indecisiveness 	<ul style="list-style-type: none"> • Seeks for hands-on help • Feels positive • Makes a decision 	<ul style="list-style-type: none"> • Completes the purchase with satisfaction 	<ul style="list-style-type: none"> • Happy with the buying experience • Shares the review • Advocates • Loyal to the brand

*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

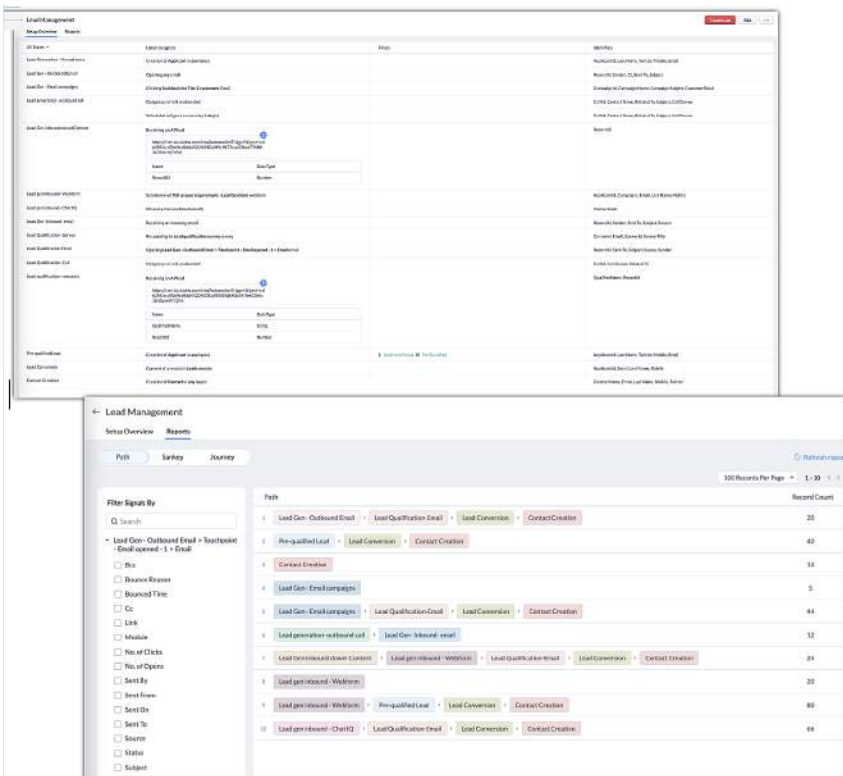
Users with the **Administrative** profile can access this feature.

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: [Orchestrate journeys using Journey Builder](#).

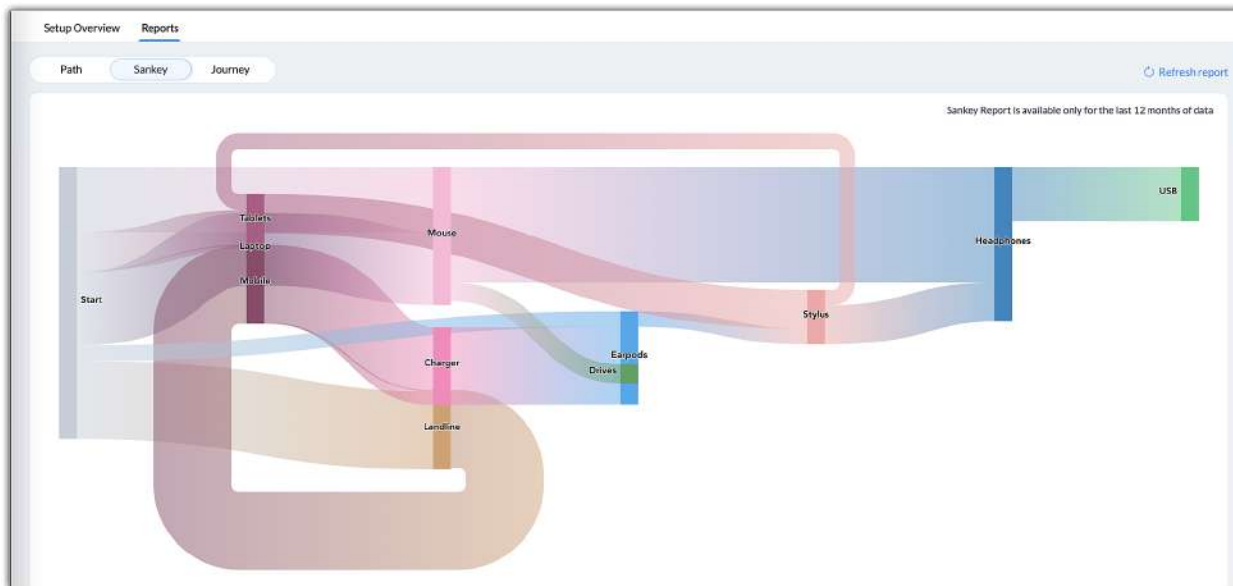


Discover Journey to optimize product placement for a retail store

Scope: Track customer journey, strategize cross-selling with PathFinder

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: Understand and decipher customer behavior.

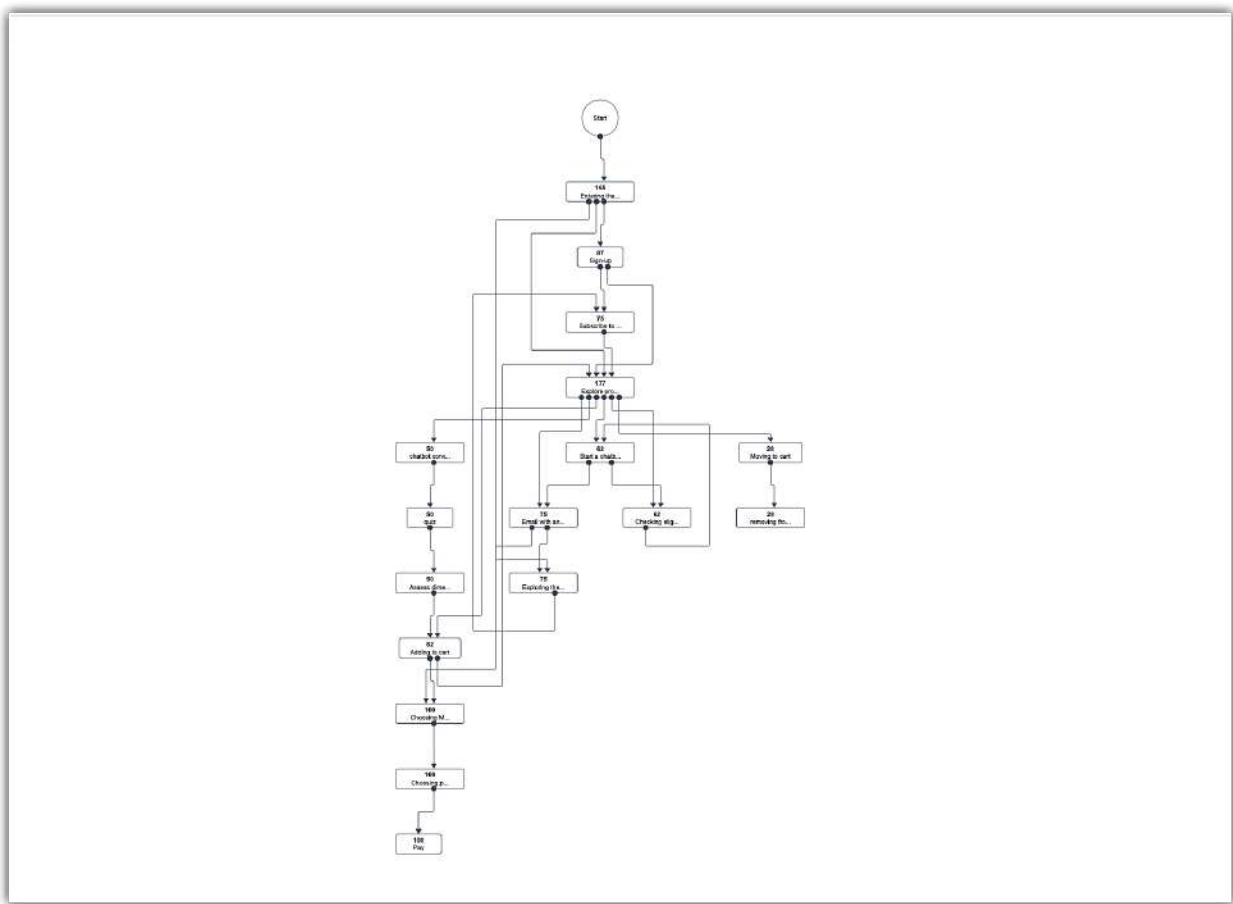
Zylker.com is a novel online electronic store, trying to understand the behavior of visitors on their site. They'd like to understand how visitors move through their site, in order to decide upon UX strategies, targeted sales, how to allocate marketing spends, and more.

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.



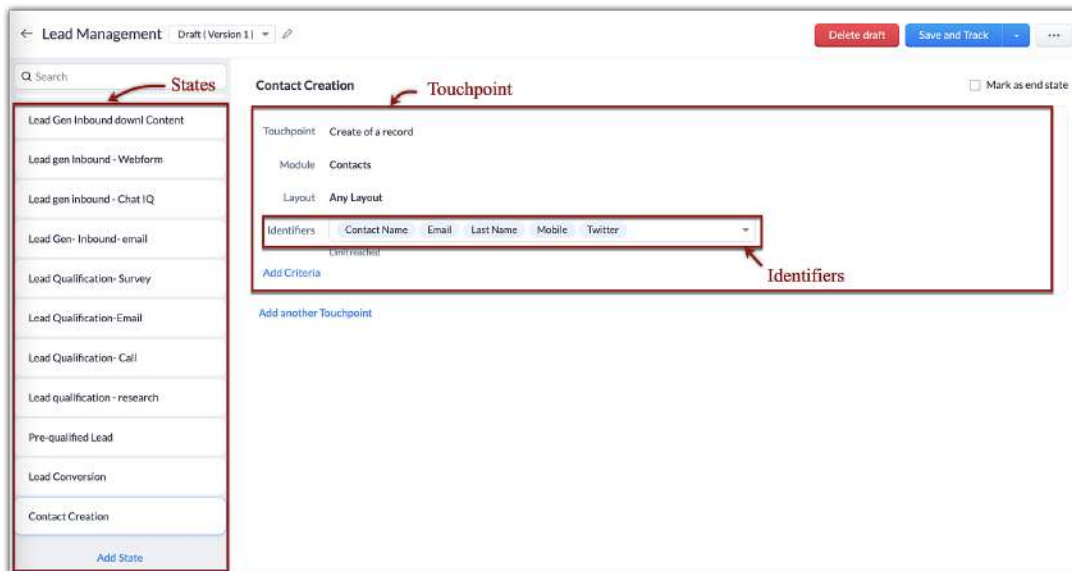
Thus, the basic algorithm of PathFinder is to capture signals and connect them to form a path. It can identify any paths or process observed in your business. What makes the difference is your objective and the configuration you make.

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.



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.

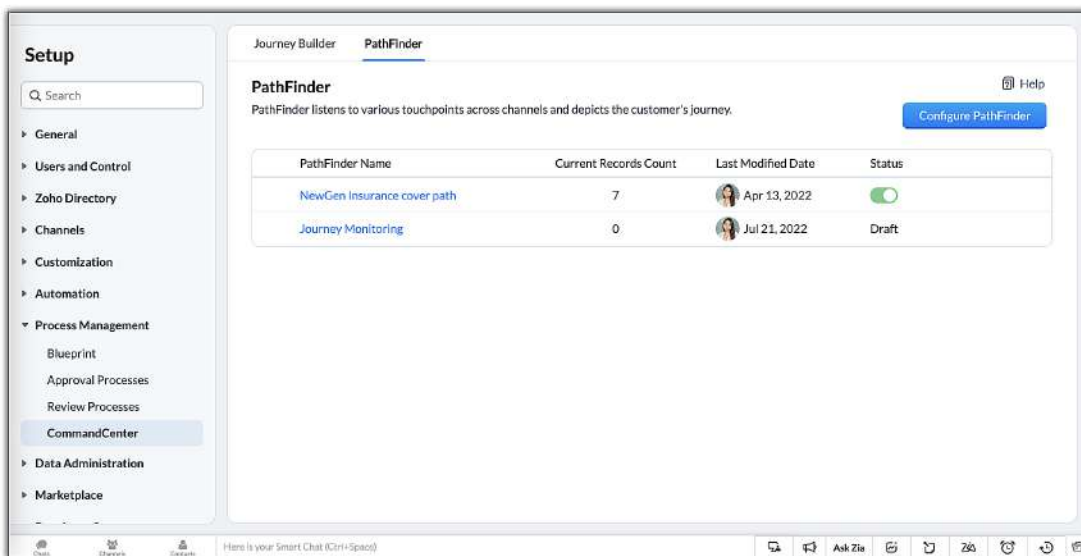
If your business offers multiple products or services, you can create multiple states for each product to track the journey at a granular level. For example, if Smartphone is one of the offerings, then you can configure the following as states:

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

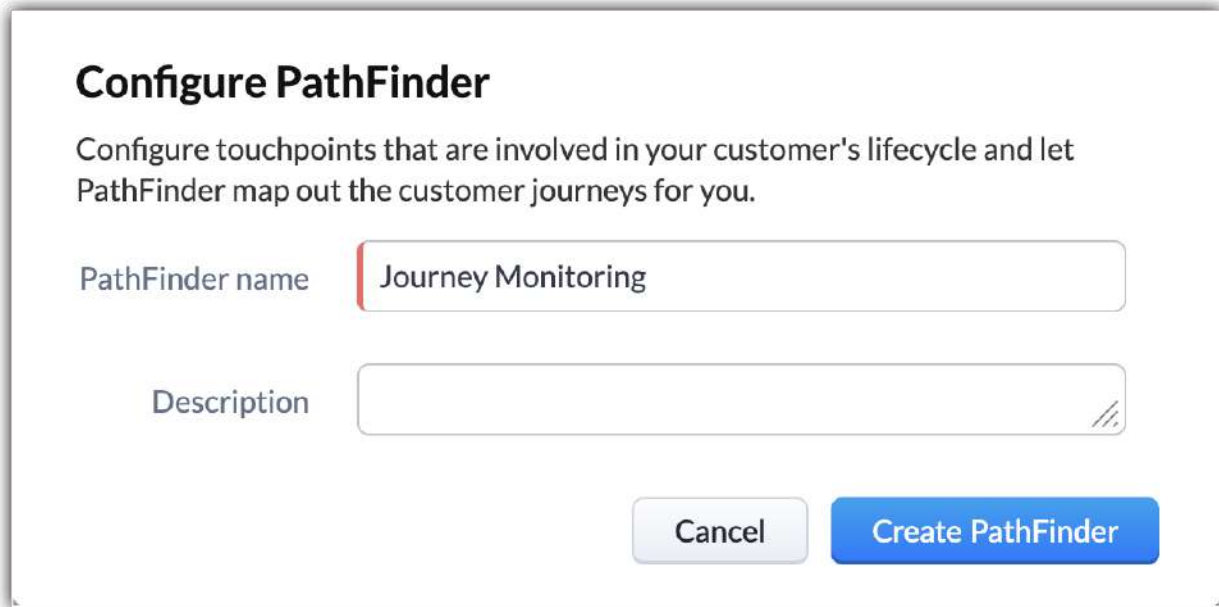
Likewise, you can ascribe states for different products and services.

To configure States,

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



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



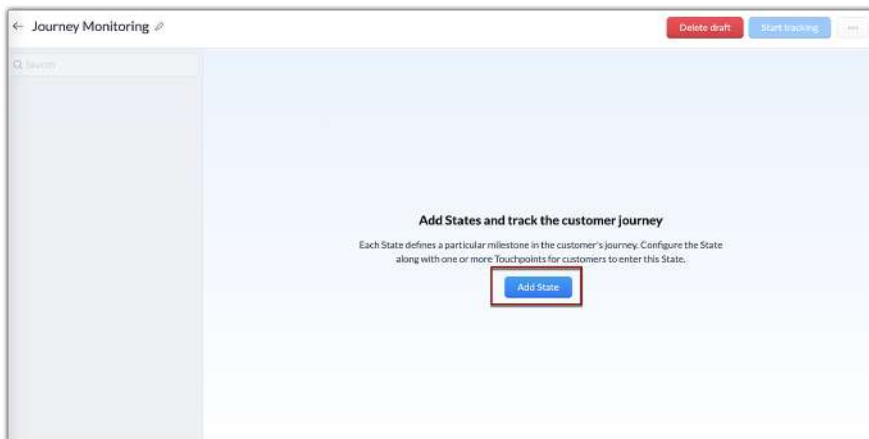
Configure PathFinder

Configure touchpoints that are involved in your customer's lifecycle and let PathFinder map out the customer journeys for you.

PathFinder name

Description

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



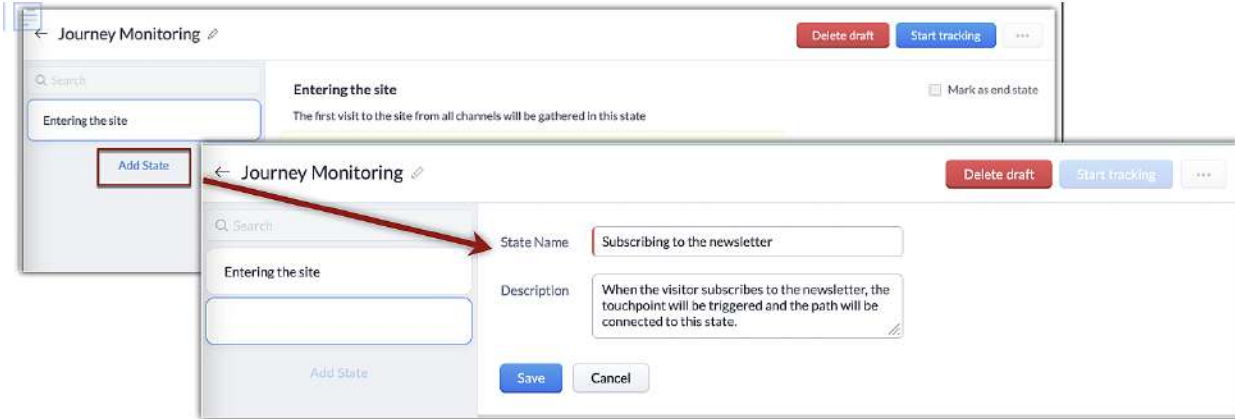
5. Provide a name and description for the state, then click **Save**.



State Name

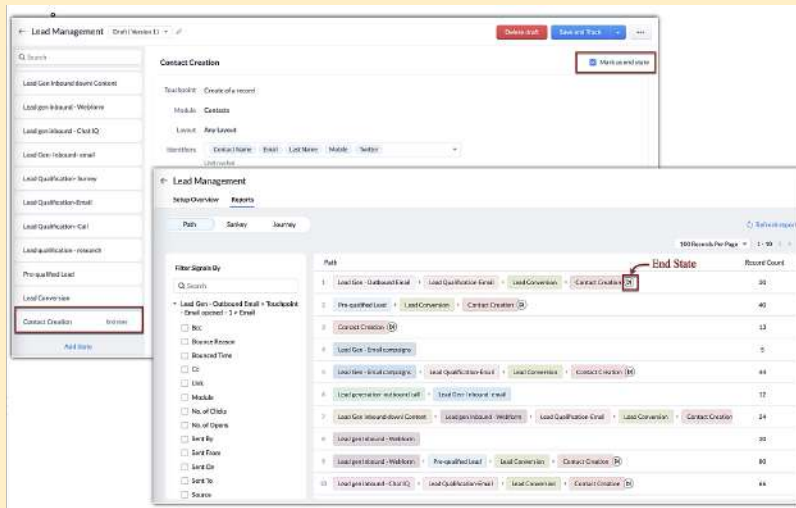
Description

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



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.



Touchpoints

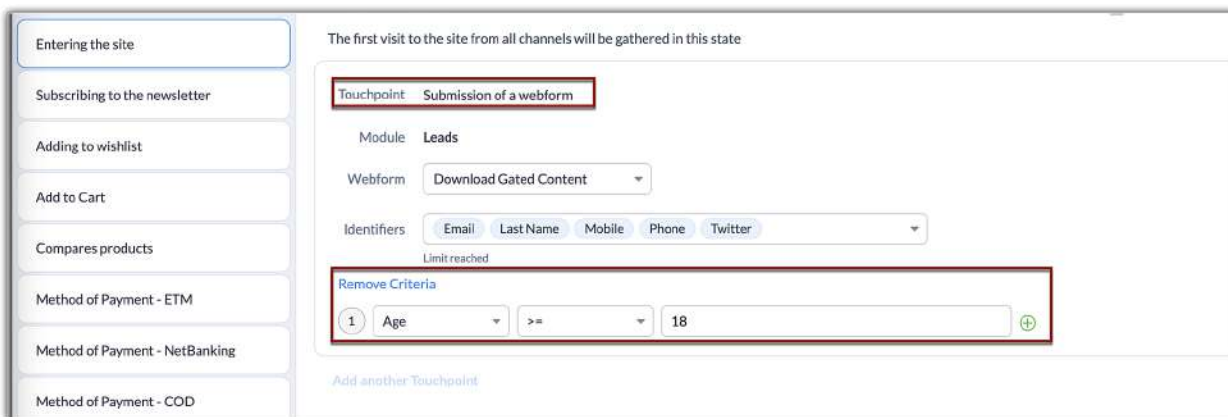
Touchpoints are user interactions in your business. Every time a user interacts with your business, the interaction triggers the corresponding touchpoint to connect the user record with the respective state.

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

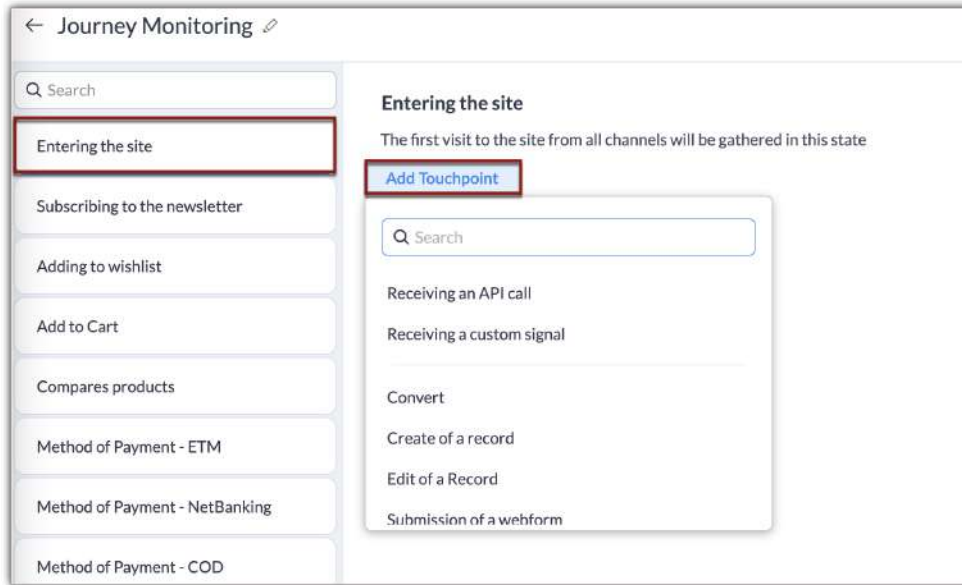
Touchpoints are module-based triggers and you can configure a touchpoint based on your objective. For example, if you determine a state for lead generation, then all lead generation activities like submission of a webform, Opening of an email, Receiving an incoming email, etc., can be configured as different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

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

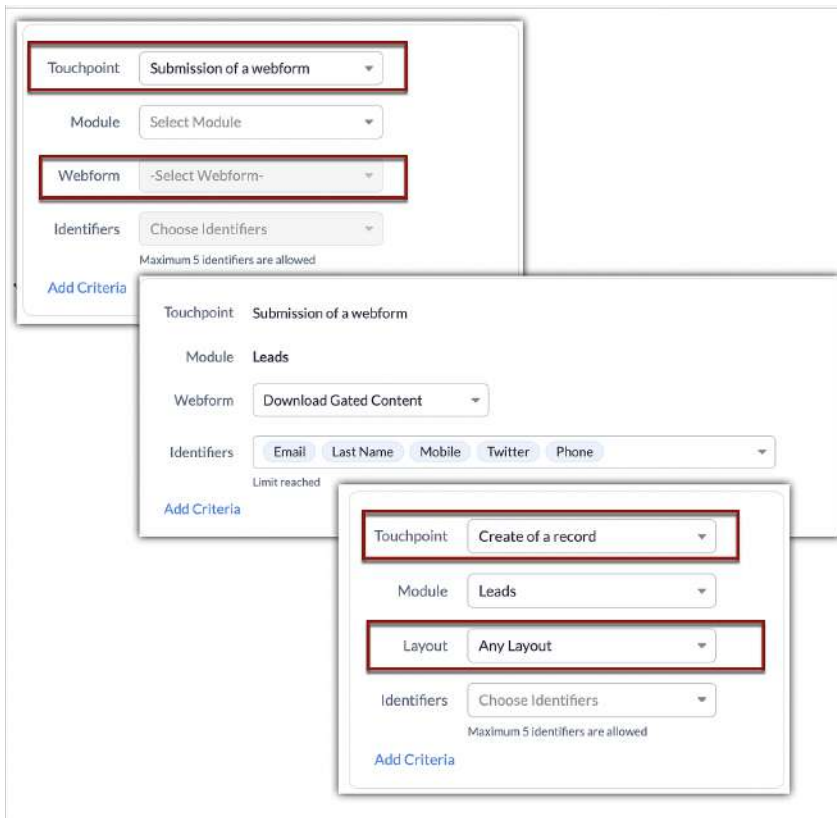


To configure Touchpoints

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.



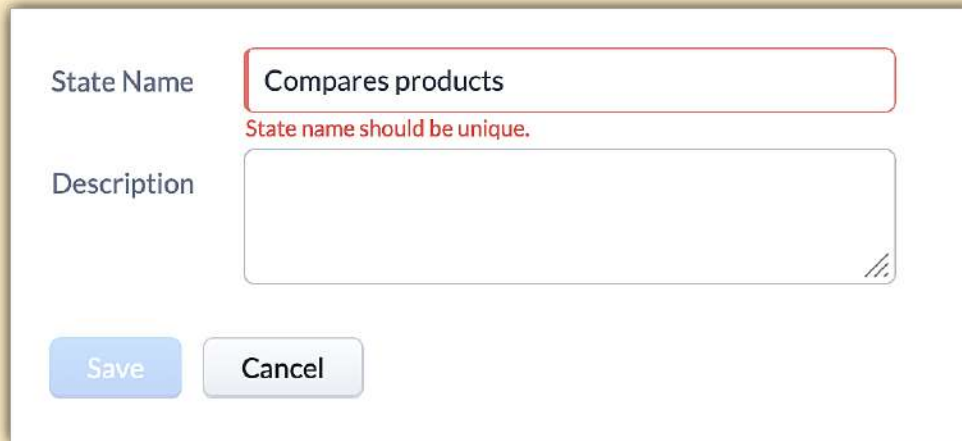
3. Select the **Module** and its related information, then add identifiers and criteria as desired.



4. Repeat this process for all states.

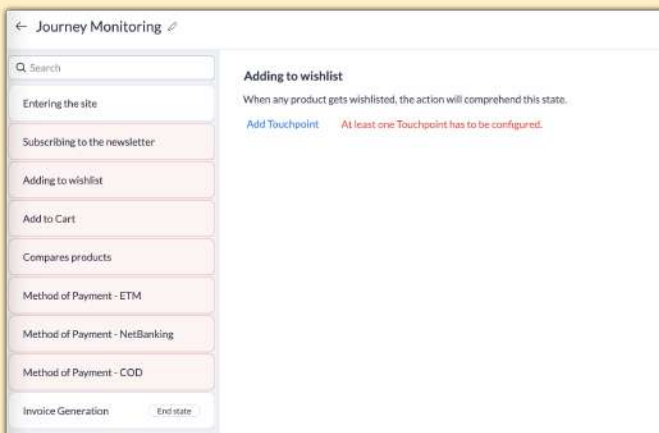
Notes:

- 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.



The screenshot shows a form for configuring a state. The 'State Name' field contains the text 'Compares products' and is highlighted with a red border. Below it, a red error message reads 'State name should be unique.'. The 'Description' field is empty. At the bottom, there are two buttons: 'Save' (blue) and 'Cancel' (grey).

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



- The email-related touchpoints will be displayed for users with the new email integration. Click [here](#) 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.

The screenshot displays the Zoho CRM PathFinder configuration interface. It features two touchpoint configuration panels. The top panel is titled "Entering the site" and includes a checkbox for "Mark as end state". Below the title, it states "The first visit to the site from all channels will be gathered in this state". The configuration for this touchpoint includes: Touchpoint: Submission of a webform; Module: Leads; Webform: Q1 FY'22 Zylker Real Estate L...; Identifiers: Email, Last Name, Mobile, Twitter, Phone; and a "Limit reached" indicator. The bottom panel is titled "Create of a record" and includes: Touchpoint: Create of a record; Module: Leads; Layout: Any Layout; Identifiers: Applicant Id, Email, Last Name, Mobile, Twitter; and a "Limit reached" indicator. Both panels have "Add Criteria" and "Add another Touchpoint" buttons.

- **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.

The screenshot shows the 'Lead Conversion' configuration window. At the top right, there is a checkbox labeled 'Mark as end state'. Below this, the configuration is organized into sections: 'Touchpoint' is set to 'Convert', and 'Module' is set to 'Leads'. The 'Identifiers' section contains a dropdown menu with five selected options: 'Applicant Id', 'Twitter', 'Last Name', 'Mobile', and 'Email'. Below the dropdown, the text 'Limit reached' is displayed. At the bottom of the configuration area, there are two links: 'Add Criteria' and 'Add another Touchpoint'.

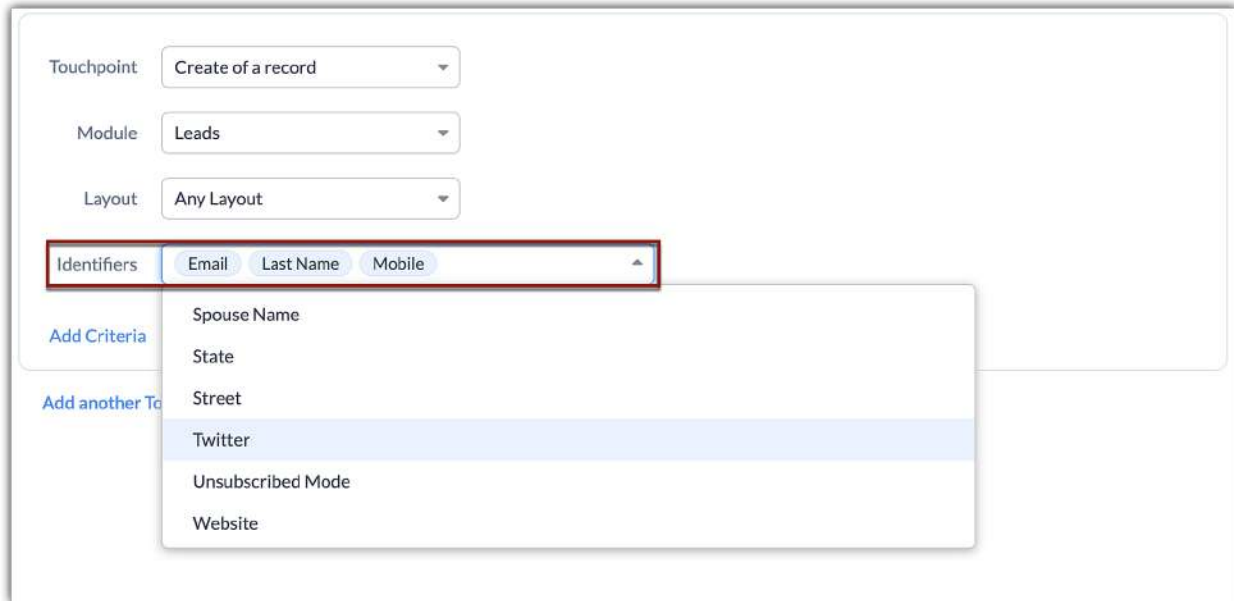
As you can see, the touchpoints in both the case are from same module/ layout so that the same identifiers can be used. If you would like to track a path between two modules, then the fields present in one module may not be available in the other module. In this case, you can

- 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.

The screenshot shows the 'Contact' configuration window. At the top right, there is a checkbox labeled 'Mark as end state'. Below this, the configuration is organized into sections: 'Touchpoint' is set to 'Create of a record', 'Module' is set to 'Contacts', and 'Layout' is set to 'Any Layout'. The 'Identifiers' section contains a dropdown menu with five selected options: 'Contact Name', 'Email', 'Mobile', 'Twitter', and 'Contact Id'. Below the dropdown, the text 'Limit reached' is displayed. At the bottom of the configuration area, there are two links: 'Add Criteria' and 'Add another Touchpoint'.

To configure Identifiers for a touchpoint:

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



The screenshot shows the configuration interface for a touchpoint. At the top, there are three dropdown menus: 'Touchpoint' set to 'Create of a record', 'Module' set to 'Leads', and 'Layout' set to 'Any Layout'. Below these is the 'Identifiers' section, which is highlighted with a red box. The 'Identifiers' dropdown is open, showing a list of fields: 'Email', 'Last Name', and 'Mobile' are currently selected and highlighted in blue. Below these, a list of other available fields is shown: 'Spouse Name', 'State', 'Street', 'Twitter', 'Unsubscribed Mode', and 'Website'. The 'Twitter' field is currently selected in the list. To the left of the 'Identifiers' dropdown, there are two buttons: 'Add Criteria' and 'Add another Touchpoint'.

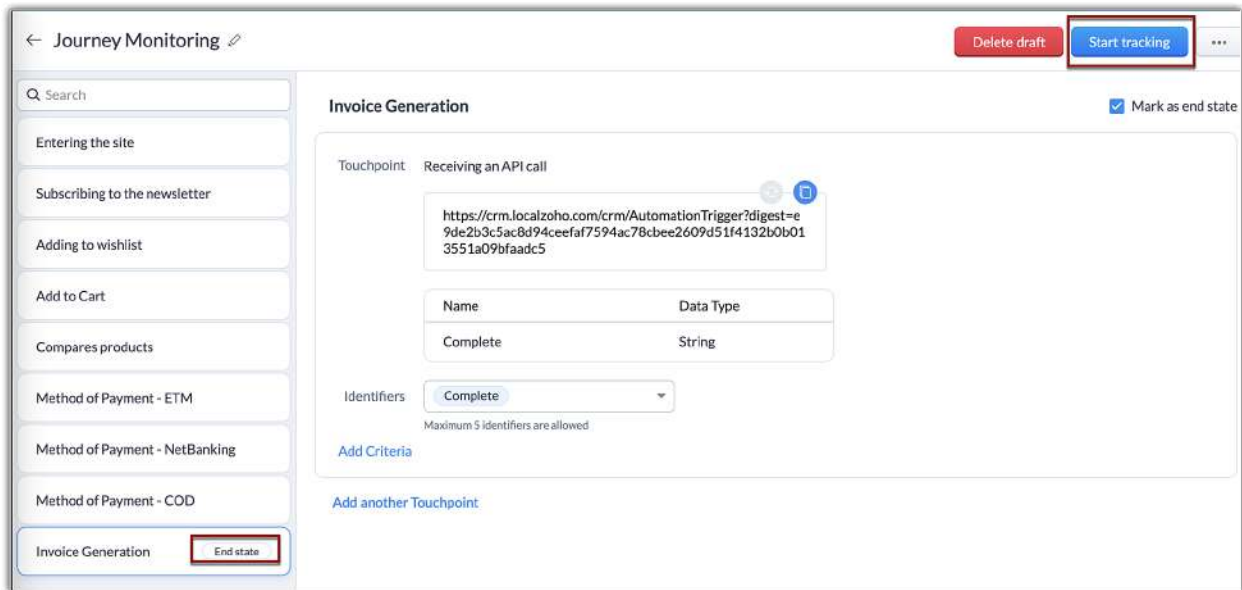
Notes:

- Based on the module chosen during the touchpoint configuration, PathFinder auto-populates 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.

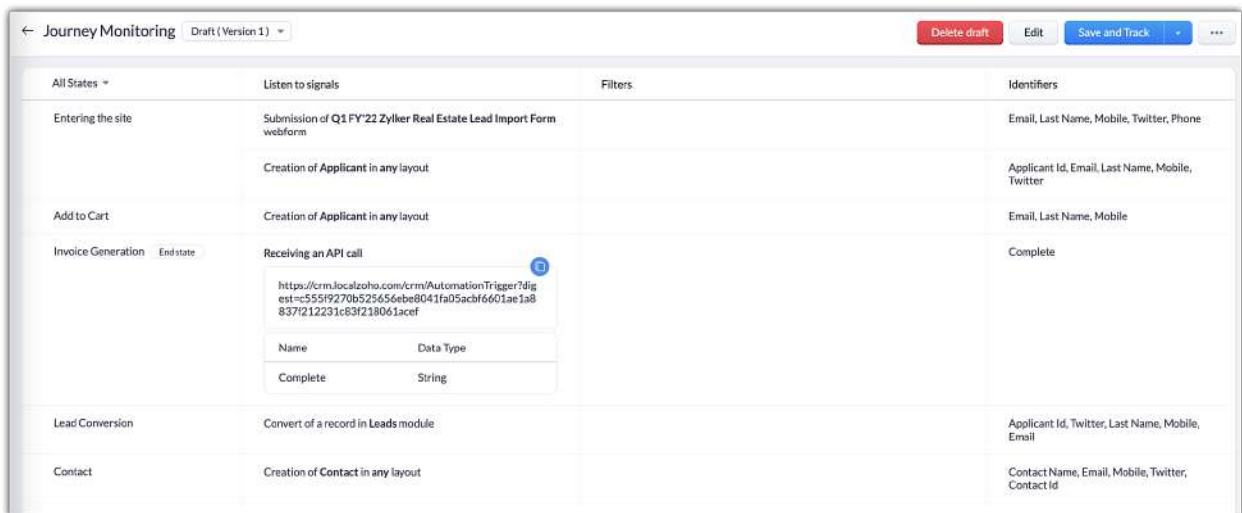
Track the Journeys

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

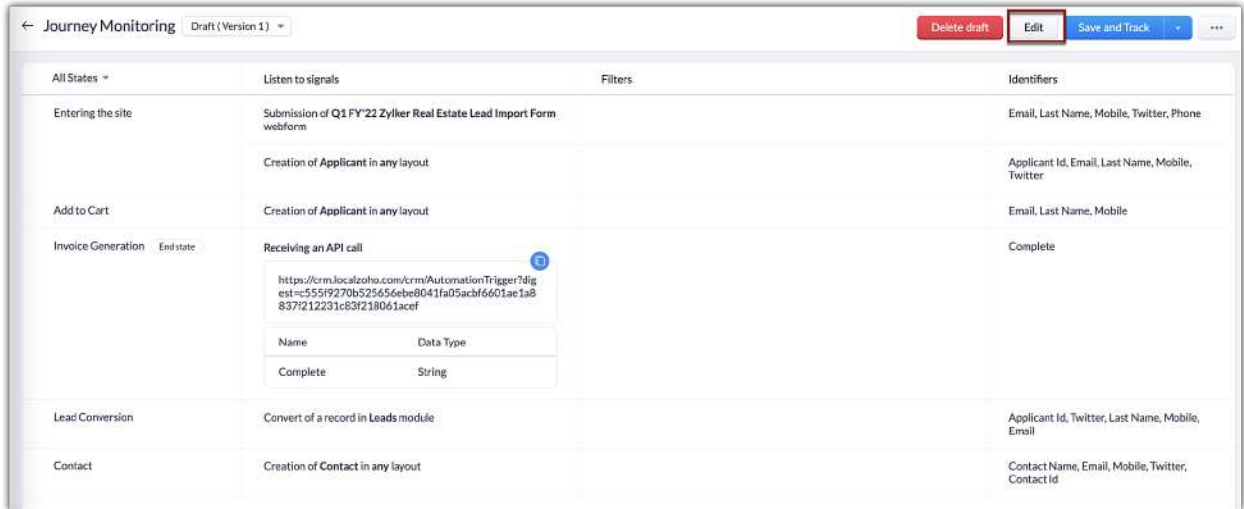
- For a newly created PathFinder, you can click **start tracking** button.



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



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



- 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.



Publish Lead Management

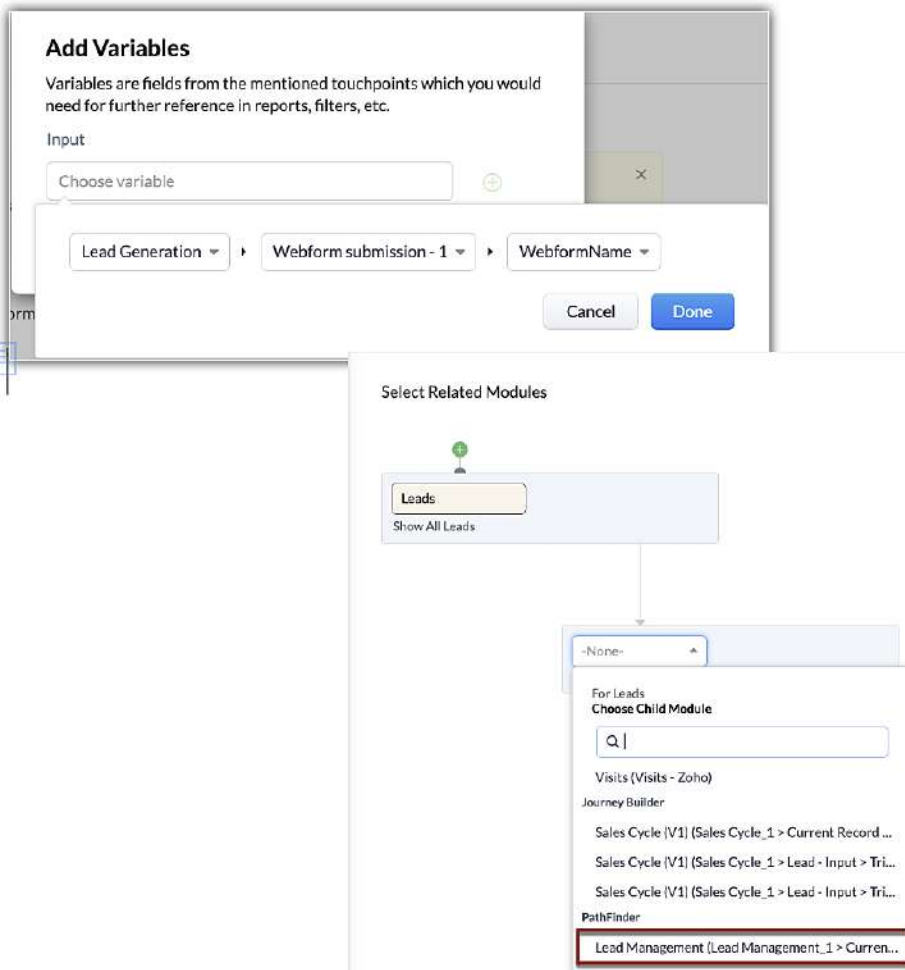
Tracking this as a new version will deactivate the currently active version 1 and exit all the records present.

Yes, Proceed Cancel

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:

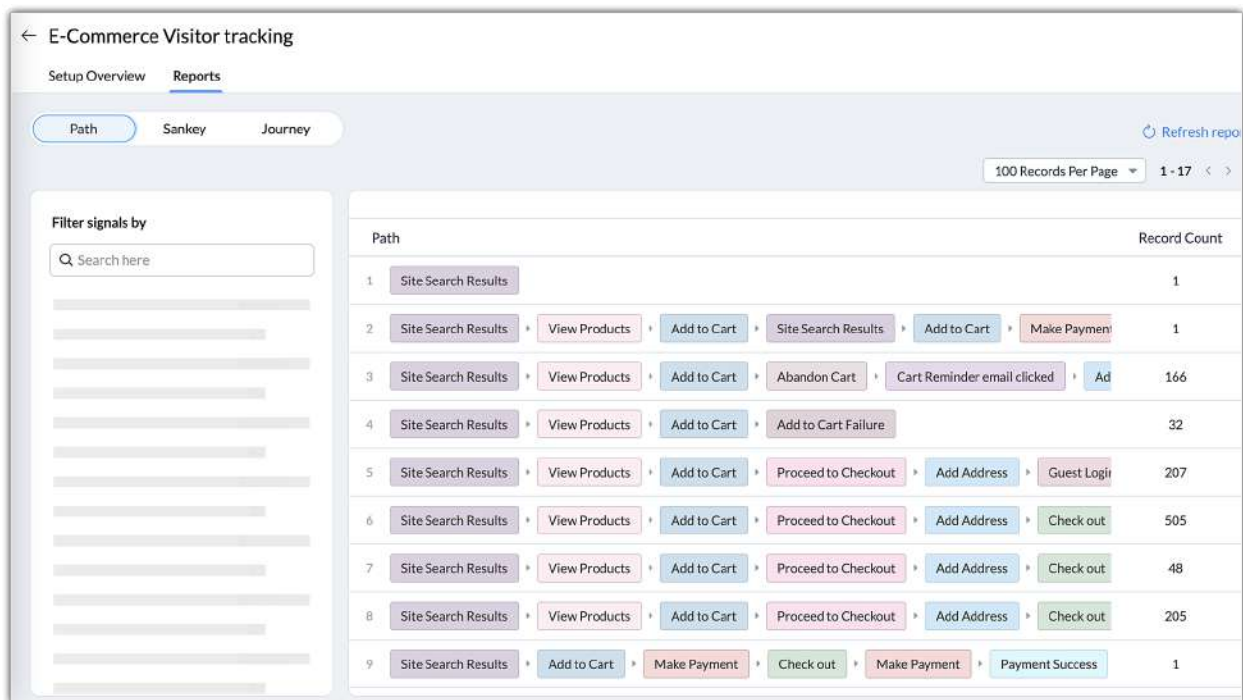
- **Path**
- **Sankey**
- **Journey**

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.



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 cart** 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

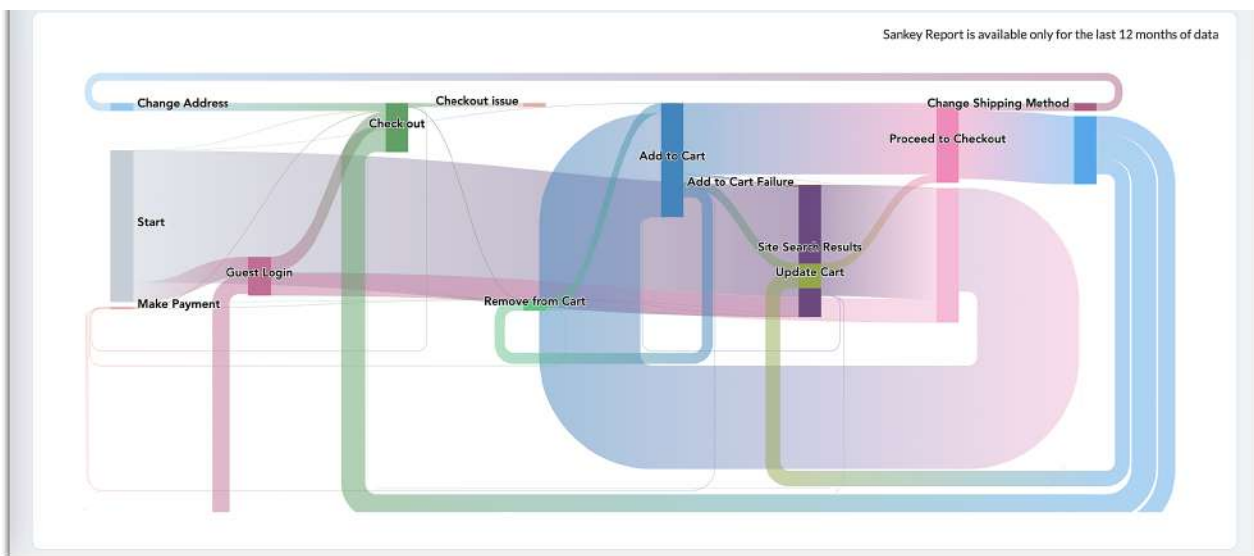
▶ **Contact > Touchpoint - Create - 1 >
CreatedRecord**

▼ **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.

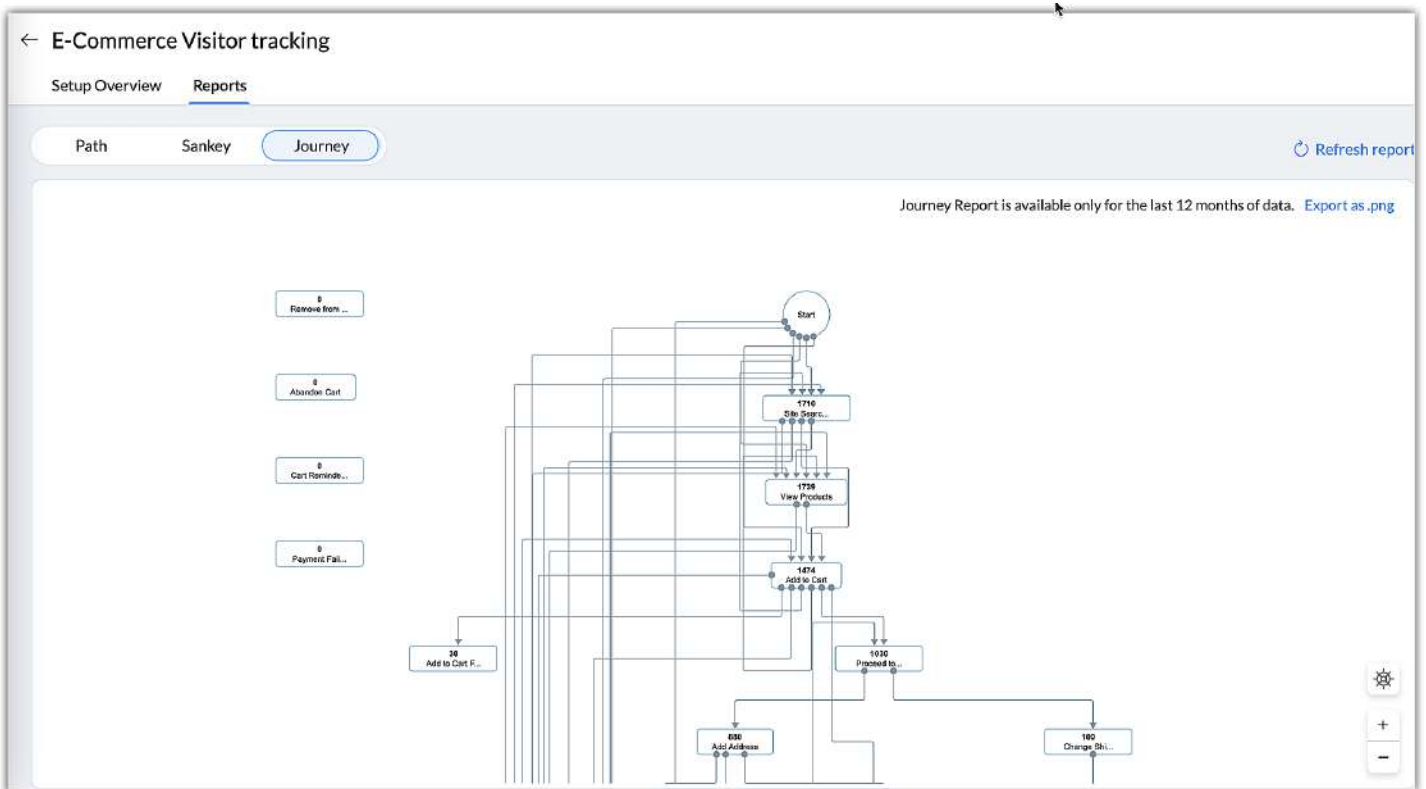
- A few visitors who had to change their address and shipping method, are required to circle back to the checkout step. Simplifying this roundabout will save visitor's time and enhance the experience.

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.

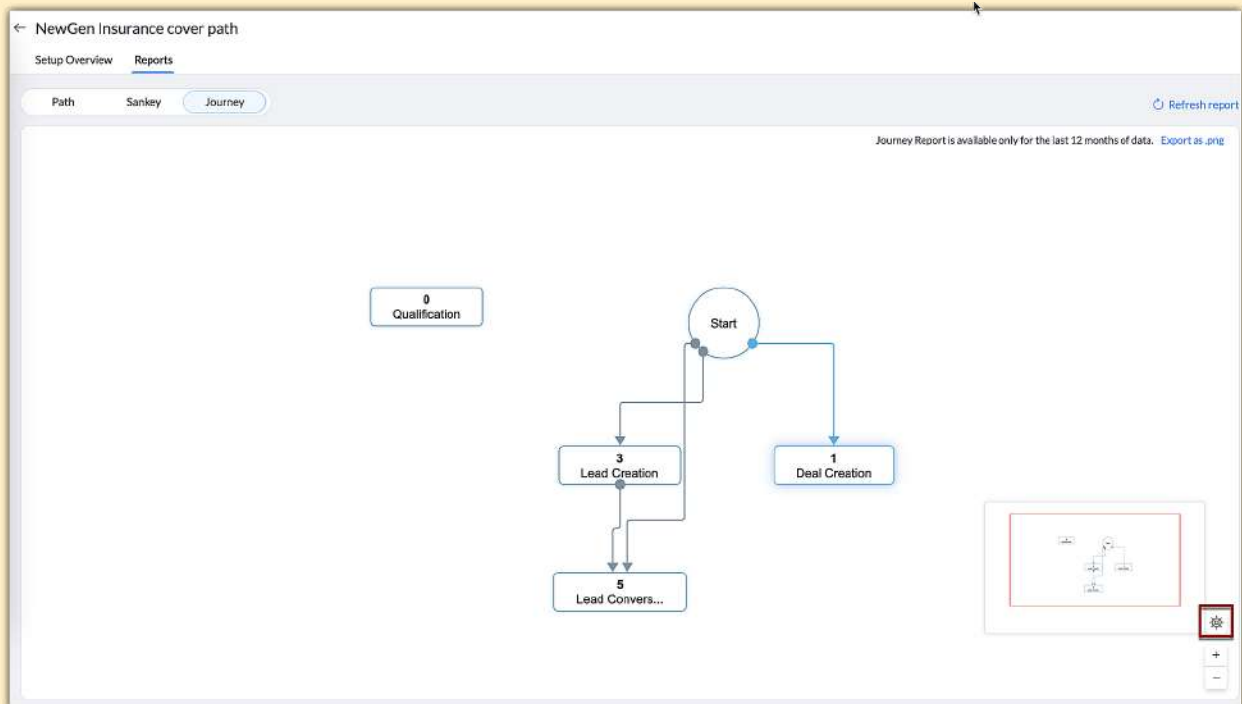


From the above image you can see that:

- 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.

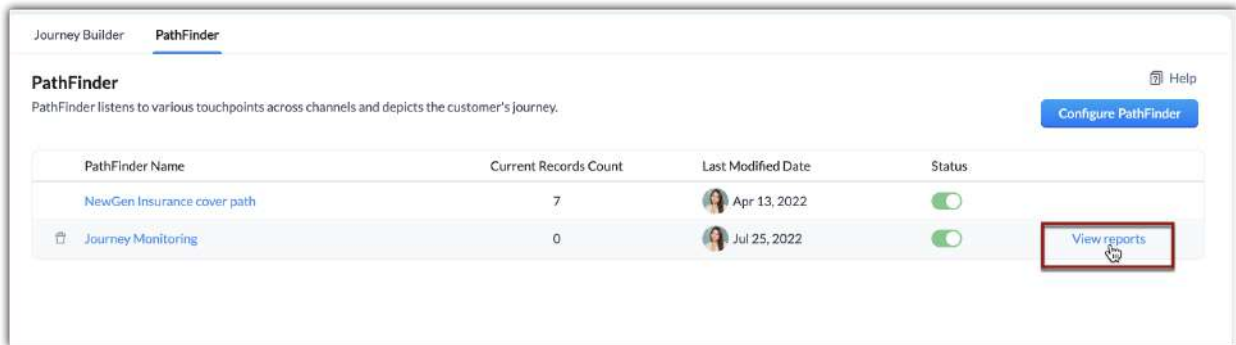
Notes:

- 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 the list view.



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

Thank You!