



# **DHL Rate Comparator and Shipment Tracking**

**Zoho CRM Extension**



**User Manual**

**Version 1.0**

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# DHL Rate Comparator and Shipment Tracking – Zoho CRM Extension: User Manual

## 1. Overview

DHL is a German courier, parcel, and express mail service which is a division of the German logistics company Deutsche Post DHL. It is the leading global brand in the logistics industry. **DHL Rate Comparator and Shipment Tracking** is an extension for Zoho CRM developed by Tiara, a Zoho Alliance Partner, and available in Zoho Marketplace for all Zoho users to deploy as an extension for Zoho CRM.

Using this extension, Zoho CRM users can easily track your DHL shipment using DHL Tracking Number within Zoho CRM and also, get the DHL Shipping rate for different delivery options (service type) from within your Zoho CRM account.

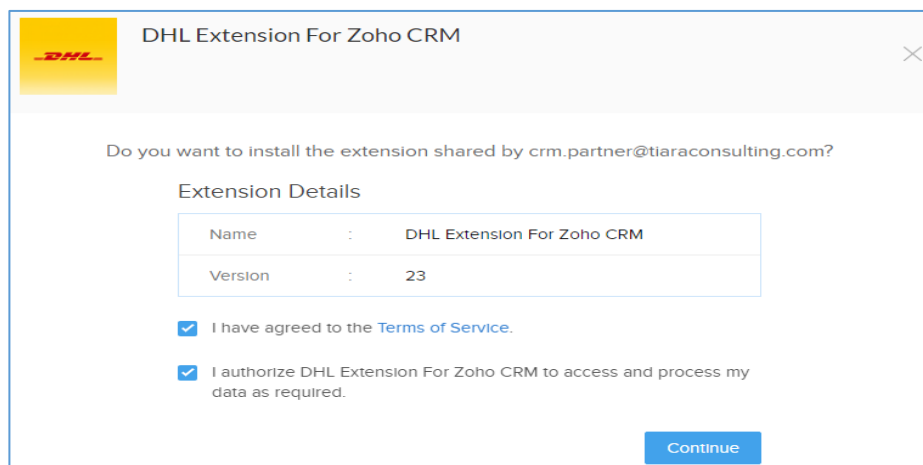
This User Manual document provides step-by-step instructions to install this extension from Zoho Marketplace, how to configure and use the shipment tracking functions within your Zoho CRM account.

### 1.1. Installing DHL Extension

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

**To install the DHL 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 **DHL**, locate (see screenshot below) and then click the extension. The details about the extension will be shown.
- ❖ Click **Install** button.
- ❖ Make sure you check the “Agree to the **Terms of Service**” and “**Authorize DHL Extension**” checkbox and click **Continue**.



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

DHL Extension For Zoho CRM

Choose Users/ Profiles

Install for admins only

Install for all users

Choose profiles

[Back](#) [Confirm](#)

- ❖ Specify the *credentials* of your DHL account, Address of your Company / Organization and click **Save**.

DHL Extension For Zoho CRM

**Extension Settings**

Site ID

Site Password

Street

City

State

Zip Code

Country

[Skip](#) [Save](#)

## 1.2. Getting DHL Credentials

To activate the DHL Extension, the below credentials are mandatory.

- ❖ **DHL SiteID**
- ❖ **DHL Password**

### 1.2.1. For UK and Rest of the world

For getting the SiteID and password for countries other than United States, you should contact DHL account manager and request integration for XML Express API. The presales should provide you live credentials.

### 1.2.2. For US

For getting the SiteID and Password for United States, you need to write to **xmlrequests@dhl.com** along with your full Account details like account number, region, address, etc. to get the credentials.

## 2. Tracking DHL Shipment

The user can track any shipment by entering DHL tracking number within the Invoice module of Zoho CRM.

### 2.1. Invoice

In Invoice module, the following custom fields are created after the successful installation of the Extension. Below are the details of the custom fields created by the extension within **Invoice** module.

- ❖ **DHL Tracking Number** : Text Field
- ❖ **DHL Tracking Status** : Text Field

The screenshot shows the 'Create Invoice' form in Zoho CRM. The form is titled 'Create Invoice' and has a sub-header 'Edit Page Layout'. There are three buttons at the top right: 'Cancel', 'Save and New', and 'Save'. The form is divided into two columns. The left column contains fields for 'Invoice Owner' (Joe Krishna Joe Krishna), 'Subject', 'Invoice Date' (Oct 22, 2020), 'Due Date' (MMMM, YYYY), 'Sales Commission' (\$), 'Account Name', and 'Contact Name'. The right column contains fields for 'Sales Order', 'Purchase Order', 'Excise Duty' (\$), and 'Status' (Created). At the bottom of the form, there are two custom fields: 'DHL Tracking Number' and 'DHL Tracking Status'. Both of these fields are highlighted with red boxes.

Enter the **DHL Tracking Number** in the custom field and click **SAVE** button. Upon clicking the SAVE button, the shipment tracking information is fetched and displayed on the '**DHL Tracking Status**'.

### 3. DHL Rate Comparator

In addition to tracking the DHL shipment, user can also calculate the DHL shipment rate by providing the following package parameters and also, compare the rate of different options and pick the best option.

- ❖ Weight of the Product
- ❖ Package Dimensions( Height/ Width/ Length)
- ❖ Package Quantity
- ❖ Dimension and Weight Unit
- ❖ Address of the addressee
- ❖ Address of the Sender

#### 3.1 Rate Comparator – Within Quotes module

The DHL Rate Comparator functionality is enabled within **Quotes** module of Zoho CRM. Following custom fields are created within Quotes module upon the installation of DHL Extension

❖ DHL Package Height	:	Decimal Field
❖ DHL Package Length	:	Decimal Field
❖ DHL Package Quantity	:	Decimal Field
❖ DHL Package Weight	:	Decimal Field
❖ DHL Package Width	:	Decimal Field
❖ DHL Price Breakup Detail	:	Text Field
❖ DHL Service Type	:	Dropdown Field
❖ DHL Shipping Date	:	Date Field
❖ DHL UOM Type	:	Dropdown Field
❖ DHL Weight Type	:	Dropdown Field

After entering values for the above custom fields (except Price Breakup field and Service Type field), click **SAVE** button to display the Shipping Rate for each of the available Shipment Options in the ‘**DHL Price Breakup Detail**’ field as shown in the below screenshot. The user can select any one of the available Shipment Option in **DHL Service Type** and the Shipment Cost will be added as a separate line item in the Quote, and the grand total is displayed.

#	Product Details	List Price (\$)	Quantity	Amount (\$)	Discount (\$)	Tax (\$)	Total (\$)
1	TP-Link WiFi 6 Router	1,009.99	2	2,019.98	0.00	0.00	2,019.98
2	DHL Shipping Charge EXPRESS WORLDWIDE	455.80	1	455.80	0.00	0.00	455.80

Sub Total	\$ 2,475.78
Discount	\$ 0.00
Tax	\$ 0.00
Adjustment	\$ 0.00
<b>Grand Total</b>	<b>\$ 2,475.78</b>

### 3.2 Rate Comparator – Within Sales Order module

The DHL Rate Comparator functionality is enabled within **Sales Order** module of Zoho CRM. Following custom fields are created within SO module upon the installation of DHL Extension

- ❖ **DHL Package Height** : **Decimal Field**
- ❖ **DHL Package Length** : **Decimal Field**
- ❖ **DHL Package Quantity** : **Decimal Field**
- ❖ **DHL Package Weight** : **Decimal Field**
- ❖ **DHL Package Width** : **Decimal Field**
- ❖ **DHL Price Breakup Detail** : **Text Field**
- ❖ **DHL Service Type** : **Dropdown Field**
- ❖ **DHL Shipping Date** : **Date Field**
- ❖ **DHL UOM Type** : **Dropdown Field**
- ❖ **DHL Weight Type** : **Dropdown Field**

After entering values for the above custom fields (except Price Breakup field and Service Type field), click **SAVE** button to display the Shipping Rate for each of the available Shipment Options in the **'DHL Price Breakup Detail'** field as shown in the below screenshot. The user can select any one of the available Shipment Option in **DHL Service Type** and the Shipment Cost will be added as a separate line item in the SO, and the grand total is displayed.



Overview Timeline Last Update : a while a

Modified By	Joe Krishna Joe Krishna Fri, 23 Oct 2020 12:39 AM	DHL Package Length	2
DHL Package Height	2	DHL Package Weight	9
DHL Package Quantity	2	<b>DHL Price Breakup Detail</b> Billingweight : 9.000 LB Service Type : EXPRESS WORLDWIDE Transportation Charges : USD 137.070 EMERGENCY SITUATION : USD 0.810 FUEL SURCHARGE : USD 4.140 ----- Total Charges : USD 142.020 -----	
DHL Package Width	12		
DHL Shipping Date	Oct 30, 2020		
DHL Weight Type	LB		
		DHL UOM Type	IN
		DHL Service Type	EXPRESS WORLDWIDE

Overview Timeline Last Update : 12:39 A


**Product Details**

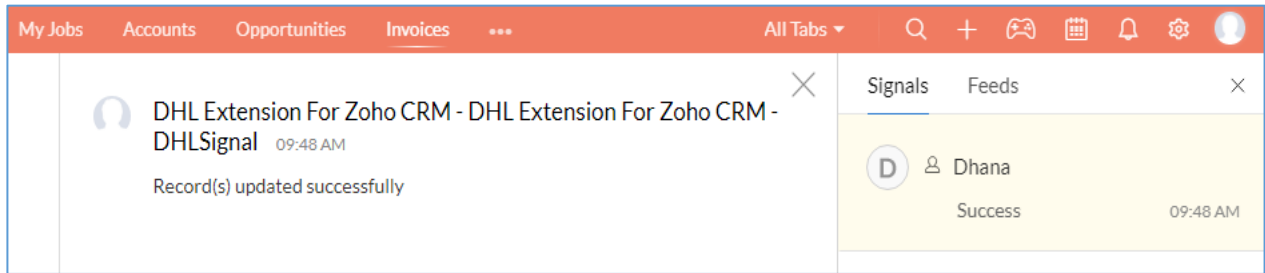
#	Product Details	List Price (\$)	Quantity	Amount (\$)	Discount (\$)	Tax (\$)	Total (\$)	
1	TP-Link WiFi 6 Router	1,009.99	2	2,019.98	0.00	0.00	2,019.98	
2	DHL Shipping Charge EXPRESS WORLDWIDE	142.02	1	142.02	0.00	0.00	142.02	
							Sub Total	\$ 2,162.00
							Discount	\$ 0.00
							Tax	\$ 0.00
							Adjustment	\$ 0.00
							<b>Grand Total</b>	<b>\$ 2,162.00</b>

## 4. Important Notes

### 4.1 SalesSignals

The user will receive the real-time notifications for both the Rate Comparator & Shipment Tracking functionality inside the Zoho CRM as **SalesSignals**. SalesSignals notifications are displayed when you

click  [the Notifications icon] on the top-right corner of the Zoho CRM home page. The signal will be raised, when there is a value for Contact Name with valid email address.



## 4.2 Country Code

In order to calculate the Price Breakup details, it's mandatory to provide the **Country/Region Code** as the value in both the Extension Setting page (for Country) and Quotes/SO (for Shipping Country).

**Example:**

- For India, the code is **IN**
- For United States of America, the code is **US**
- For Australia, the code is **AU**

## 5. Support Contacts for DHL Extension – Tiara Help Desk

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

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