



# Training Guide

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# Zoho CRM for Beginners

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## Session schedule



CRM overview



Main modules and functions



Other modules and functions

# What is CRM?

## Customer Relationship Management (CRM)

- prospects (project stakeholders)
- sales projects
- sales activities

## Main Benefits

- sales reps: pipeline visibility, activity tracking
- sales execs: sales forecast
- marketing: efforts can be measured
- IT: centralized system



# About Zoho CRM



## Core Functionality

- salesforce automation
- sales performance tracking
- activity tracking
- workflow improvement
- reporting

## About the system

- 100% cloud based - no maintenance needed
- award winner (CRM Magazine Market Leader Award) link
- software suite - marketing, project, etc. modules
- library of 3rd party integrations

# How info is stored in CRM



**Account:** a company or a main client entity

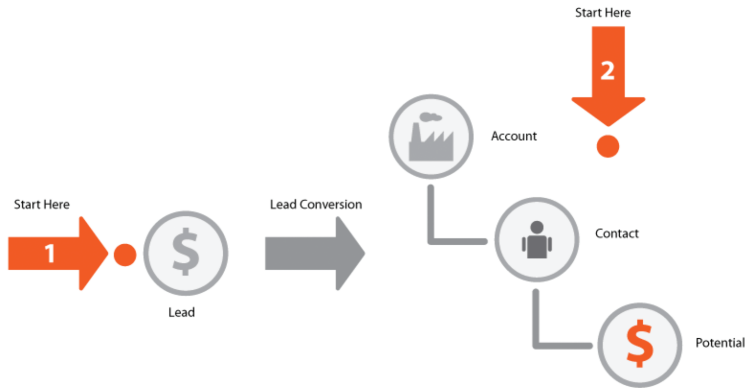
**Contact:** a person

**Lead:** a generic business interest (not very specific)

**Potential:** a specific business opportunity or project

**Activity:** interaction between the company and an external party

# How info is stored in CRM



- start with a LEAD or skip to creating a CONTACT - depends on how your sales works
- a LEAD can be converted to ACCOUNT+CONTACT+POTENTIAL

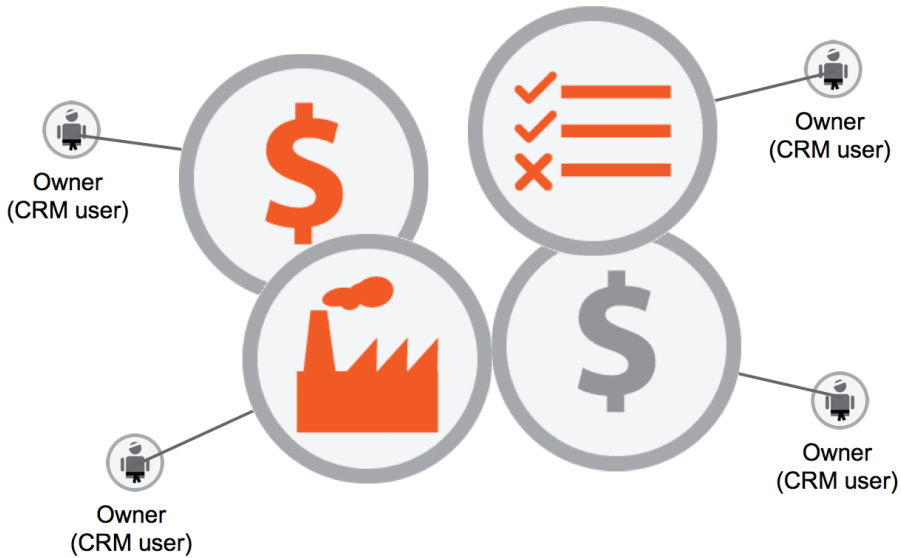
# How info is stored in CRM

STRUCTURE !

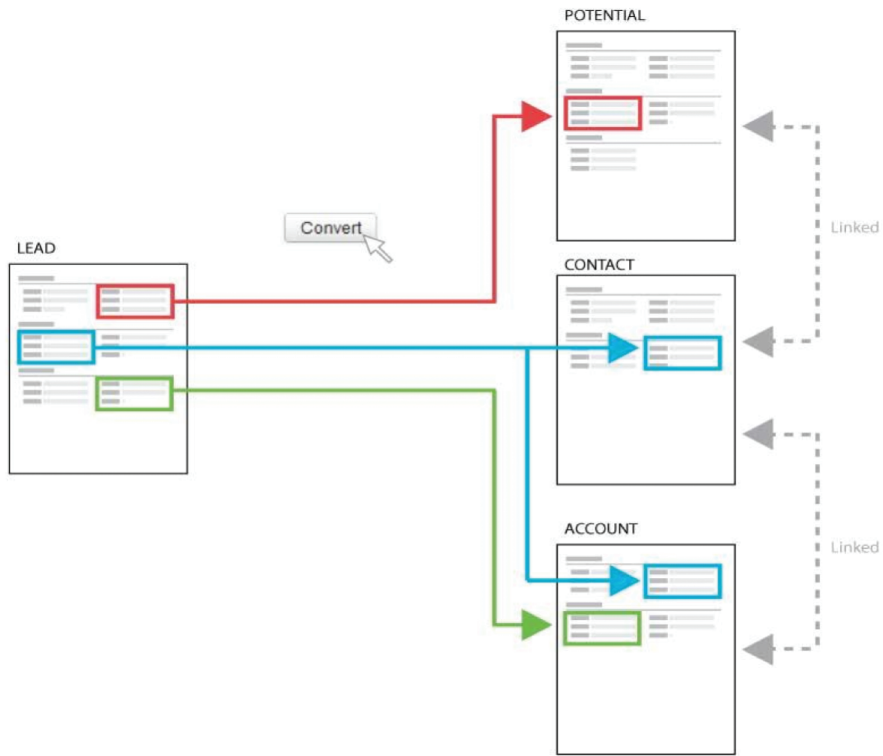


# How info is stored in CRM

Record ownership: each piece of information is "owned" by a CRM user



# How info is stored in CRM

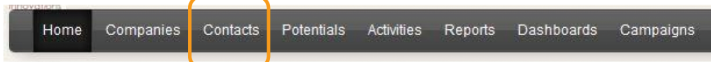


# How info is stored in CRM

data object  
(form)



module  
(tab)



**All Contacts**

Contact Name	Phone	Email
Gayle Carsen	847-385-7140	Gayle.Carsen@ales
Gregory Bingaman	(574) 847-7421	GBINGAMAN@men
Penny Ham	331-622-1888	
JoAnn Shou		
James Har		
Robert Dow		
Homero		
Heather Gar		

**Create Contact**

Contact Information

Contact Owner: Lindsay Robbins

Lead Source: None

First Name: None

Middle Name:

Prefix:

Email:

\*Last Name:

Suffix:

Title:

Company Name:

# Screen Layout

**viwo** Upgrade Setup Help bence\_orfal

Home Leads Accounts Contacts Brands Campaigns Activities Emails Pulse Chat

← Edit Delete Clone More Actions

**adidas** - Last Update: 02:13 PM

Parent Account : Phone: (310) 555-9999

**Account Information**

Account Name:	adidas	Parent Account:	
Account Type:		Account Number:	
Phone:	(310) 555-9999	Fax:	

**Address Information** [Locate Map](#)

Billing Street:	1234 Main St	Shipping Street:	1234 Main St
Billing City:	Los Angeles	Shipping City:	Los Angeles
Billing State:	CA	Shipping State:	CA
Billing Code:		Shipping Code:	
Billing Country:		Rating:	
		Shipping Country:	

**Quick Actions**

- Add a new brand
- Add a new contact
- Add a new task

**Related Contacts**

Mike Testcontact

Links: Add

What's Links?

Page continues

# Screen Layout

← Edit Delete Clone More Actions

**adidas** Last Update : 02:13 PM

Parent Account

(310) 555-9999

Follow

Notes for this Account  Show All Notes

Attachments

No records found [Desktop](#) [Zoho Docs](#) [Google Docs](#)

Contacts

Contact Name	Email	Phone	Mobile	Fax
Mike Testcontact	bence@vivoconsulting.com	310-555-5555		

Open Activities

Owner Name	Subject	Modified Time	Activity Type	Status	Start DateTime	End DateTime
Bence Oriai	aaa	12/18/2012 01:20 PM	Tasks	Not Started		

# Live demo



## Switch to Zoho CRM and demo:

- logging in
- screen sections
- create a Lead

# Tracking activities



## E-mails

- inbound / outbound
- requires mail add-on
- fully automatic
- attaches to Contacts



## Calls

- log only (no recording!)
- planned (future)
- past (occurred)



## Events

- in calendar
- start & end time
- location
- attendees



## Attachments

- static file storage
- source: upload / Zoho Docs / Google Drive



## Tasks

- single to-do item
- due date

# Tracking activities

Can be attached to many objects

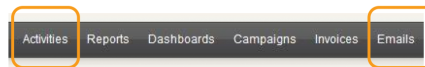
- Leads
- Accounts, Contacts
- Potentials
- Campaigns
- Other objects



# Tracking activities

## Accessible at many areas in CRM

- Related Info area
- Related List
- Activities Tab
- Emails tab



Quick Actions

- Add a new potential
- Send Mail
- Add a new task
- Add a new event
- Add a new call

Potentials in Pipeline

9 user E ZCRM needs workflow - \$5,000.00

Open Tasks

**Overdue**

10/27/2012 check status

Open Activities

	Owner Name	Subject	Modified Time	Activity Type	Due Date	Status	Start Date/Time	End Date/Time
Edit	Bence Orial	Sen proposal	09/11/2012 04:48 PM	Tasks		Not Started		
<a href="#">New Task</a> <a href="#">New Event</a> <a href="#">Log a Call</a>								

Closed Activities

	Owner Name	Subject	Modified Time	Activity Type	Due Date	Status	Start Date/Time	End Date/Time	Call Start Time
Edit	Bence Orial	Follow up call	09/11/2012 04:48 PM	Tasks		Completed			

# E-mail add on

The screenshot displays the Zoho CRM interface for a contact named Patrick Moore. The contact's profile includes fields for Occupation (Expeditor), Mailing City, and Phones. Below the profile is a 'Notes for this Person' section and a 'Jobs' table. The 'Emails' section is highlighted with an orange border, and a yellow callout box points to it with the text 'E-mails visible under Contacts'.

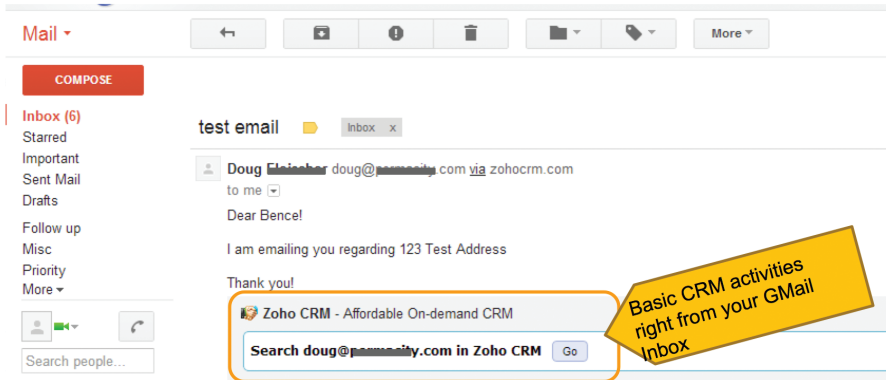
Job ID	Job address	Job Name	Job owner	Amount	Stage	Closing Date
C-3305	20341 W. Acre St.	Patio design	Eric Pontacq	\$950.00	Send prop	09/30/2013
C-3192	1624 S Curson Ave	remodel	Brian Marshall	\$1,975.00	Closed - Won	07/16/2012
C-3134	1670 Sunset Plaza dr	addition remodel	Greenberg, Allen	\$1,975.00	Closed - Won	07/20/2012
C-3107	343 Stowe Terrace	stairs and carport addition	Bowden, Daryl	\$1,500.00	Follow up	01/01/2111
C-3040	813 Vernon Ave	addition amd remodel	Muresianu, Andrei	\$1,275.00	Closed - Lost to Competition	04/24/2012
C-3025	2011 Lincoln Blvd	commercial	David & Williams	\$1,475.00	Closed - Lost to competition	05/11/2012

From To	Subject	Date	Sent By
permtmypropert@gmail.com	1624 Curson	07/11/2012 05:40:21 PM	Erdelyi Office
permtmypropert@gmail.com	Proposal for engineering and design (1624 S Curson A	07/11/2012 05:04:43 PM	Erdelyi Office
permtmypropert@gmail.com	Re: 343 Stow Terrace proposal	06/04/2012 11:04:17 PM	Patrick Moore
permtmypropert@gmail.com	Re: 343 Stow Terrace proposal	06/04/2012 02:31:25 PM	Patrick Moore
permtmypropert@gmail.com	343 Stow Terrace proposal	06/04/2012 02:26:14 PM	Erdelyi Office

- SEND and RECEIVE emails in Zoho CRM
- associate e-mails with contacts
- review conversations conveniently
- use TEMPLATES to cookie-cutter emails

# E-mail add on

## GMail plug-in module



# Additional modules



## Campaigns

- track marketing efforts
- manage tasks around campaigns
- associate Leads, Contacts
- attaches to Contactst



## Quotes / Invoices / Sale Orders

- generate sales documents
- specify products offered
- confirm sales in writing



## Cases and Solutions

- use for customer support
- keep track of customer issues
- escalate issues as needed
- build solution library



## Purchase Orders

- static file storage
- source: upload / Zoho Docs / Google Drive



## Products and Vendors

- set up product lists (SKUs)
- assign them to many modules
- keep Vendor info in one place



## Documents

- file storage inside Zoho CRM
- store shared files
- associate files with modules

# Additional functions

## Notifications

- built in e-mail engine
- e-mail notifications to users
- e-mail messages to customers

## Automation

- workflow rules
- automated events
- macros

## Security

- role based access
- field level restrictions
- IP based login

## Integrations

- with other Zoho products
- with Google Apps
- 3rd party thru API, webhooks
- Zoho Creator







# Live demo



## Switch to Zoho CRM and demo:

- show Activities module
- e-mails attached to a Contacts
- additional modules

# Mobile access

	<b>Main site</b> zoho.com/crm	<b>Mobile Site</b> m.zoho.com/crm	<b>App</b> (free download from store)
<b>Features</b>	everything	main sales features	main sales features offline access contact sync
<b>License needed</b>	regular user	none (included in subscription)	mobile add-on
<b>Desktop / Laptop with browser</b>		-	-
<b>Smartphone (iPhone / Android)</b>	-		
<b>Tablet (iPad / Android)</b>			
	minor limitations		separate tablet app

## Additional Info

More information on this subject on the Zoho website:

<http://www.zoho.com/crm/help/>

<http://www.zoho.com/crm/help/understanding-zohocrm.html>

<http://www.zoho.com/crm/help/understanding-zohocrm.html>



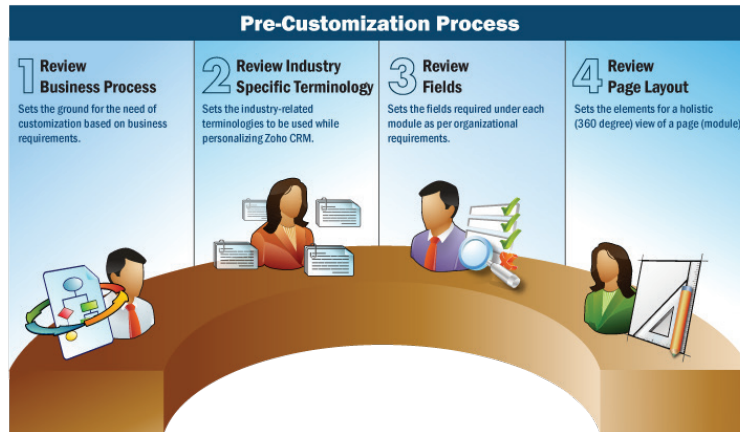
# Customizing CRM for Your Business

# Session Schedule

- Pre-customization
- Tab Customization
- Page Customization
- Field-Customization
- Company-level Customization
- User-level Customization

# Pre-customization

To use a product is good but to shape the product as per ones requirements is still better. One of the key elements of Zoho CRM is its capacity to allow customization and the flexibility to do so— thus enabling a realistic and a holistic approach to customer relations management. But before getting into customizing Zoho CRM, the questions to be answered are: why to customize? And how to customize? This is called the Pre-Customization stage.



# Pre-Customization Steps



## **Review Business Process**

This initiates discussion on the organization's requirements. Involving exercises on understanding organization's process, new demands, suggestions and decision making, this process sets the ground for the need of customizing Zoho CRM.



## **Review Industry-specific Terminology**

Each industry type has something unique to offer. The terms differ from company to company as well as industry to industry. It is therefore conducive for organizations to use industry-specific terminologies while customizing Zoho CRM setup.



## **Review Fields**







Not all fields and modules offered in the Zoho CRM would match every industry's requirements. This process would help select the fields as per the business requirements.



## **Review Page Layout**

This process helps define the necessary details in the page layout, providing a holistic (360 degree) view of the page details as per organizational requirements.

# Levels of Customization

Tab	Page	Fields	Company	User	Others
 <ul style="list-style-type: none"><li>• Organize tabs</li><li>• Rename tabs</li><li>• Group tabs</li><li>• Web tabs</li><li>• Custom apps</li></ul>	 <ul style="list-style-type: none"><li>• Page Layout</li><li>• Related Lists</li><li>• Custom Links</li><li>• Custom Related Lists</li></ul>	 <ul style="list-style-type: none"><li>• Custom fields</li><li>• Special fields</li><li>• Dependency fields</li><li>• Lead Conversion mapping</li></ul>	 <ul style="list-style-type: none"><li>• Logo</li><li>• Currency</li><li>• Fiscal Year</li></ul>	 <ul style="list-style-type: none"><li>• Date</li><li>• Time zone</li><li>• Language</li><li>• Name Format</li><li>• Signature</li><li>• Summary View</li><li>• Home page</li></ul>	 <ul style="list-style-type: none"><li>• Search Layout</li><li>• Custom View</li></ul>

# Tab Customization

Once the ground work for the product customization is done, the next step is to start personalizing the product to suit organizational workflow. Explained below are the different process that enable a complete Zoho CRM customization.

- ➔ Show or Hide Tabs
- ➔ Rename Tabs
- ➔ Tab Groups
- ➔ Web Tabs
- ➔ Custom Apps

# Show/Hide Tabs

By default, Zoho CRM displays 18 modules\*. This option allows you to display only the relevant modules and hide the unwanted ones. For instance, an educational organization using Zoho CRM might not require the Quotes or Invoices – this can be rather hidden.



**Hint:** Click on **Setup >> Customization >> Tabs >> Organize Tabs >> show or hide tabs >> Save**

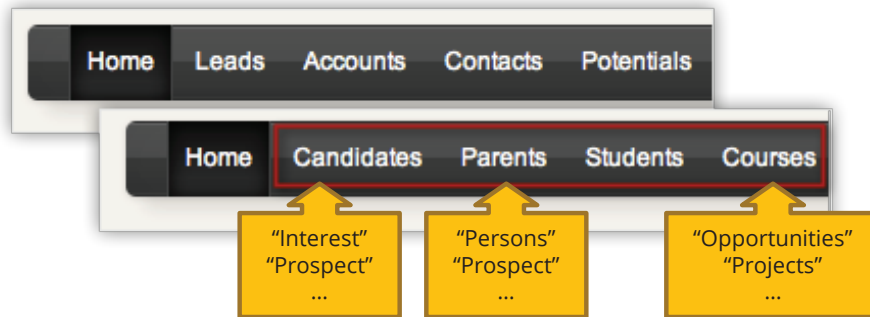


Home tab cannot be hidden. Modules are displayed according to your Edition. Irrespective of profiles, hidden modules are not displayed to any users.

# Rename Tabs

This option allows to change the name of the modules (tabs) as per industry specific terminologies. For instance, the “Leads” tab might be renamed to “Candidates” in an educational institute. See example below:

Zoho CRM	Ad Agency	IT Firm	School
Leads	Leads	Leads	Candidates
Accounts	Clients	Accounts	Parents
Contacts	Advertisers	Contacts	Students
Products	Media Type	Services	Courses



**Hint:** Click on **Setup >> Customization >> Tabs >> Rename Tabs >> Edit** (tab to be renamed)  
**>> New Tab Name >> Save**



The renamed tab names are reflected in all places except Reports and Dashboards.

# Tab Groups

Tab groups let you organize the tabs into different groups, like Sales, Marketing, Support and others. You can also assign these tab groups to users of the corresponding profiles in CRM.

The image illustrates the process of configuring and applying Tab Groups in Zoho CRM. On the left, the 'Tab Groups' configuration page is shown, featuring a 'Create Tab Group' button and a table listing existing groups. A yellow box labeled 'Selected Tabs' points to the 'Top Executives' group in the table. An orange arrow points from this group to the right-hand screenshot. The right-hand screenshot shows the Zoho CRM interface with the 'Leads' tab selected. A dropdown menu is open, showing the 'Tab Groups' option, which is highlighted with a red box. The dropdown menu lists 'Sales', 'Marketing', 'Top Executives', and 'All Tabs', with 'All Tabs' selected. Below the dropdown, a list of lead names is visible, including Albert Meyers, Alberto Garcia, Alfonso Acosta, and Allan Bridgford.

Tab Groups	
<a href="#">Create Tab Group</a>	
List of Tab Groups	
Group Name	Tabs
<a href="#">Edit</a>   <a href="#">Del</a> Sales	Home,Leads,Accounts,Contacts...
<a href="#">Edit</a>   <a href="#">Del</a> Marketing	Home,Leads,Accounts,Contacts...
<a href="#">Edit</a>   <a href="#">Del</a> Top Executives	Home,Reports Dashboards,Forecasts...

**Hint:** Click on **Setup >> Customization >> Tabs >> Tab Groups >> Create Tab Group >>** follow the steps >> **Save**

# Web Tabs

Web tabs lets you open the frequently used web pages, like company-wide announcements, intranet portals, 3<sup>rd</sup>-party applications, etc. within Zoho CRM. All the Zoho CRM users can view these web tabs as per their profile-level permission.

The image shows a screenshot of the Zoho CRM interface. On the left, the 'Create Web Tab' form is visible, with the following details:

- Tab Name:** Projects
- Link:** <https://projects.zoho.com/portal/zillum>
- Web tab access:** Available Profile: Standard, Sales, Marketing, Support; Selected Profile: Administrator
- List of Web Tabs:** A table with columns 'Tab Name' and 'Link'. The entry 'Announcements' is highlighted, with its link being <https://creator.zoho.com/pboyle/crm/>.

An orange arrow points from the 'Announcements' entry in the table to a navigation menu on the right. The menu is titled 'Zillum Inc.' and contains the following items: Home, Announcements (highlighted), Leads, Contacts, and Accounts. A yellow box labeled 'Web tab URL' has an arrow pointing to the 'Announcements' entry in the table.

**Hint:** Click on **Setup >> Customization >> Tabs >> Web Tabs >> Add a tab >> Save**

# Custom Apps

Refer: *Extending your CRM with Zoho Creator*

# Field Customization

Managing fields in Zoho CRM enables organizing the field level requirements. By default, Zoho CRM provides several standard fields and allows adding of more industry-specific fields depending on any organization's requirement.



**Standard Fields:** These are the default fields available in the modules of any Zoho CRM account viz., Owner Name, Company Name, Last Name, First Name, Lead Source, etc.



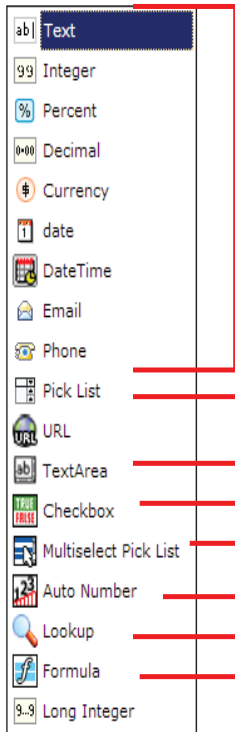
**Custom Fields:** These are the additional custom fields that are allowed. Zoho CRM allows adding 130 custom fields in each module, viz., Percentage, Text area, Picklist, etc.



**Special Fields:** These fields are used for special purposes, viz., Tax rates, Quotes, Terms & Conditions, etc.

**Hint:** Click on **Setup >> Customization >> Fields >>** select the required module >> **New Custom Field >>** Select and fill the details >> **Save**

# Custom Fields

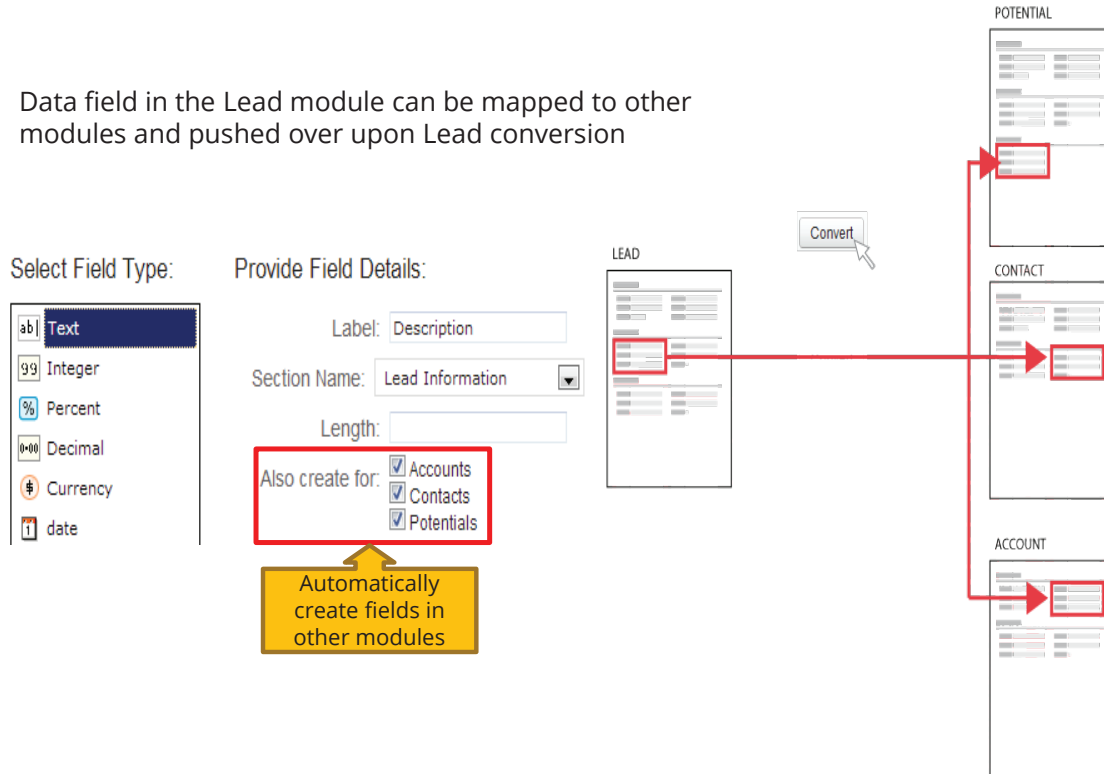


The image shows a vertical list of field types with red lines connecting them to descriptive text on the right. The field types listed are: Text, Integer, Percent, Decimal, Currency, date, DateTime, Email, Phone, Pick List, URL, TextArea, Checkbox, Multiselect Pick List, Auto Number, Lookup, Formula, and Long Integer. The 'Text' field type is highlighted with a dark blue background and a red border. Red lines connect the following field types to their descriptions: Integer, Percent, Decimal, Currency, date, DateTime, Email, Phone, Pick List, TextArea, Checkbox, Multiselect Pick List, Auto Number, Lookup, and Formula.

- enforce data types (numbers vs. text) and special formatting (phone, e-mail, etc.,)
- drop down list (single value)
- long text (memo)
- true/false (Boolean)
- pick one or multiple values
- running IDs
- info from other modules
- calculated fields (with functions)





# Field Customization

Data field in the Lead module can be mapped to other modules and pushed over upon Lead conversion











# Types of Fields







The table below provides a brief description of some of the commonly used Industry-specific custom fields:

Type	Purpose	Input
 Text	To add text type custom fields	Label: Specify the field name. Length: Specify the field size (characters).
 Integer	To add integer type number fields	Label: Specify the field name. Length: Specify the field size (integers).
 Decimal	To add decimal type number fields	Label: Specify the field name. Length: Specify the field size (with decimals). Decimal Places: Specify number of decimal places.
 Percent	To add percentage type fields	Label: Specify the field name.



Except Forecasts, custom fields can be added in all modules. Standard fields cannot be renamed and Mandatory fields cannot be hidden.

Type	Purpose	Input
 Currency	To add currency type fields	Label: Specify the field name. Length: Specify the field size (integers). Rounding Option: Specify the rounding type. Decimal Places: Specify number of decimal places. Precision: Specify the rounding precision.
 Date	To add date type fields	Label: Specify the field name.
 Date & Time	To add date and time combination fields	Label: Specify the field name.
 Email	To add email address type fields	Label: Specify the field name.
 Phone	To add phone number type fields	Label: Specify the field name. Length: Specify the field size (integers).
 Picklist	To add pick list type fields	Label: Specify the field name. Pick List Values: Specify the pick list values.
 URL	To add website addresses	Label: Specify the field name.
 Text Area	To add long text – 3000 characters	Label: Specify the field name.

Type	Purpose	Input
 Multi-select	To add pick lists with multiple selection of values	Label: Specify the field name. Pick List Values: Specify the pick list values.
 Checkbox	To select a True (checked) or False (unchecked) type value	Label: Specify the field name. Enable: Specify enable by default.
 Auto-number	To add auto-increment type fields	Label: Specify the field name. Prefix: Specify prefix of the auto number sequence. Starting Number: Specify start number of sequence. Suffix: Specify suffix of the auto number sequence. Existing Records: Select the checkbox to apply auto number to the existing records.
 Lookup	To establish Parent-child and One-to-One relationship between single module and different modules respectively	Label: Specify the field name. Lookup Type: Select module to establish relationship. Related List Label: Specify the related list view name.
 Formula	To define fields that can populate dynamically calculated data based on the values returned from other standard or custom fields	Label: Specify the field name. Formula Return Type: Select one of the data types from drop-down menu. Formula Editor: Define your formula
 Long Integer	To add fields with more than 9 digits type number fields (Ex: Serial number of records, Credit Card etc.)	Label: Specify the field name. Length: Specify the field size (integers).

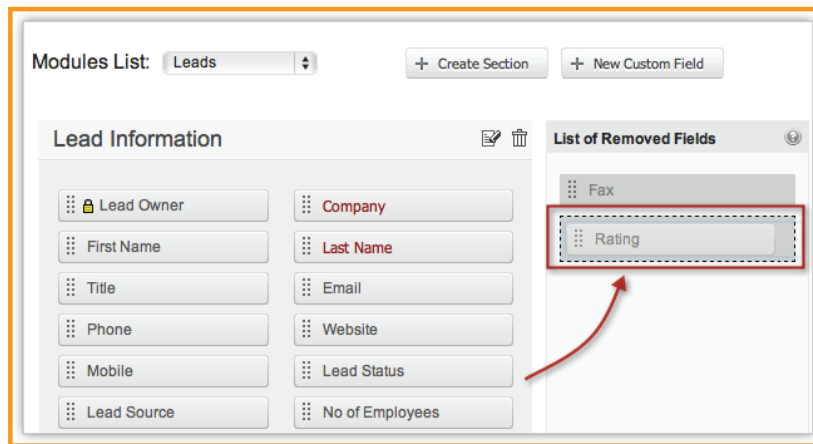
# Page Customization

Once the ground work for the product customization is done, the next step is to start personalizing the product to suit organizational workflow. Explained below are the different process that enable a complete Zoho CRM customization.

- ➔ Page Layout
- ➔ Custom Links
- ➔ Related Lists
- ➔ Search Layout
- ➔ Custom Views

# Page Layout

Known as one of the important admin functions, this allows to arrange, show / hide and order the fields within the module page. While the drag and drop option enables easy arranging of fields, the tab order option allows spanning the field length (span to two columns or span across two columns) as per requirements.



**Hint:** Click on **Setup >> Customization >> Layouts >>** select the required module >> **Edit Page Layout >> Create New Section >> Name >> Tab Order >> Save**

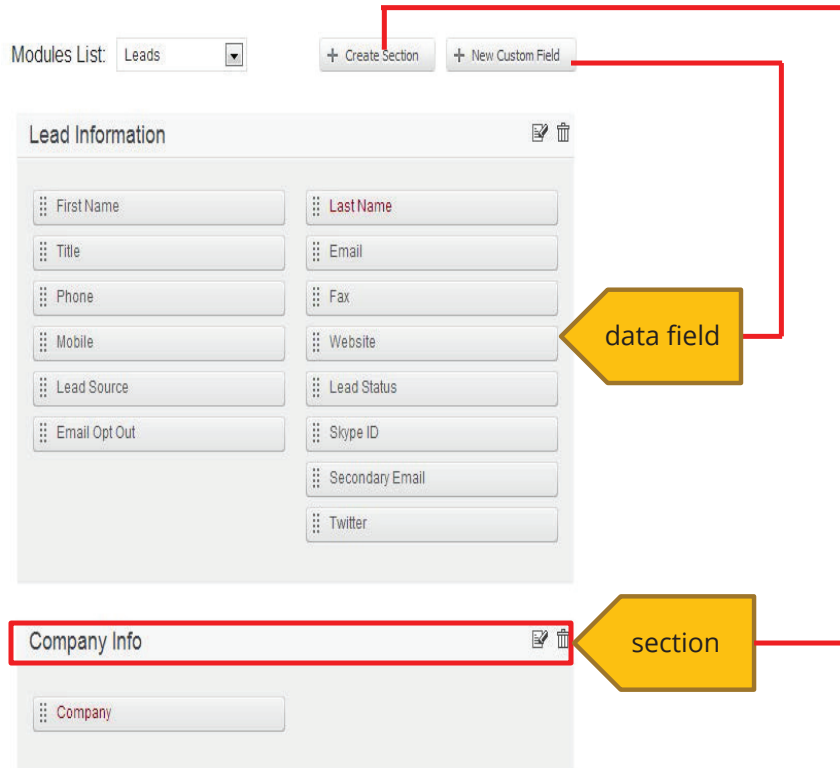
# Page Layout Components

## Zoho CRM



The data field layout in each module can be changed:

- fields rearranged
- custom fields added
- existing fields deleted or hidden
- sections rearranged
- custom sections added



The module layout can be re-arranged, fields can be re-positioned or removed using the drag and drop interface.

# Types of Columns

## Create Section

Custom section names and column layouts

Name:

custom section

Column Layout:

Two-Column

OK

Cancel

Address Information

Street:

State:

Country:

City:

Zip Code:

2-column  
layout

Description Information

Description:

1-column  
layout

# Create Record Page

Now, your salespeople can fill all details of a lead, contact, etc.,

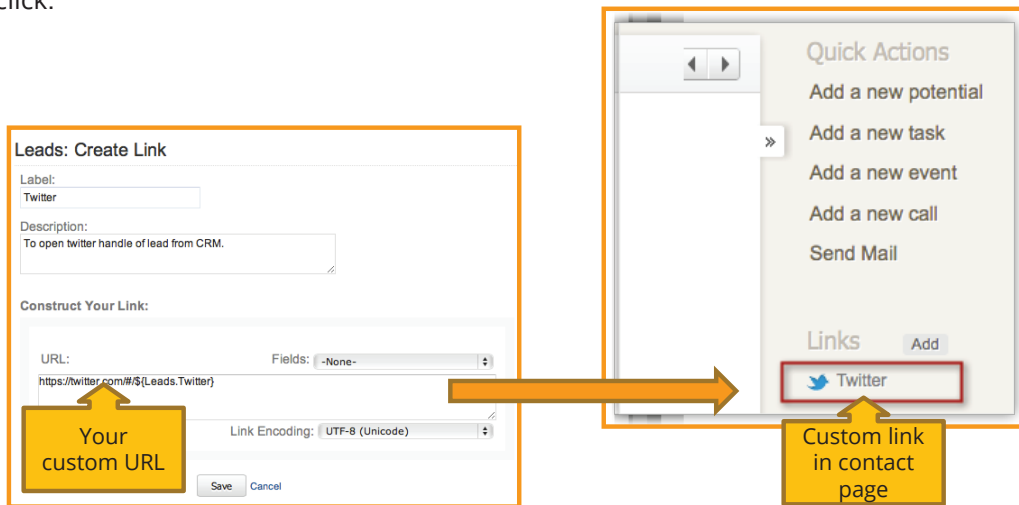
The screenshot shows a CRM interface for creating a lead. The top navigation bar includes 'Home', 'Leads', 'Accounts', 'Contacts', 'Activities', 'Emails', 'Dashboards', 'Reports', 'Potentials', 'Forecasts', and 'More...'. The main content area is titled 'Create Lead' and features a 'Lead Information' section. A yellow arrow points to the 'Lead Information' section header, and another yellow arrow points to the '\*Last Name' input field. The form contains the following fields:

- First Name:
- Title:
- Phone:
- Mobile:
- Lead Source:
- Email Opt Out:
- \*Last Name:
- Email:
- Fax:
- Website:
- Lead Status:
- Skype ID:
- Secondary Email:
- Twitter: @

Buttons for 'Save', 'Save & New', and 'Cancel' are located at the top of the form. A 'Help' icon and 'Edit Page Layout >' link are also present.

# Custom Links

Custom links help you define functions to access 3<sup>rd</sup> applications and URLs to get the required information within CRM. This function helps you integrating content from other sites also in addition to your CRM account, in just a single click.



**Hint:** Click on **Setup >> Customization >> Links >>** select the required module >> **Create Link >>** add your link >> **Save**. This link will be added to the correspond detail view page.

# Related List View

Customizing the related list view allows to re-order or add the properties in the related list view of the module. This helps putting in place all the required fields and related list, thus enabling an all round view (360° view) of the module.

Modules List Contacts

**Available Columns:**

- Contact Owner
- Lead Source
- Account Name
- Vendor Name
- Title
- Department
- Home Phone
- Other Phone
- Fax
- Mobile
- Date of Birth
- Assistant
- Asst Phone

**Selected Columns:**

- Contact Name
- Email
- Phone

**Hint:** Click on **Setup**  
**>> Customization >>**  
**Related List >>** select  
the options **>> Save**

Contacts

	Contact Name	Email	Phone
Edit   Del	Mohammed Hasan	h.mohammed@samplecompany.com	800-555-0119
Edit   Del	Sam Brown	b.sam@samplecompany.com	800-555-0123

[New](#)



Company defined mandatory fields cannot be removed.

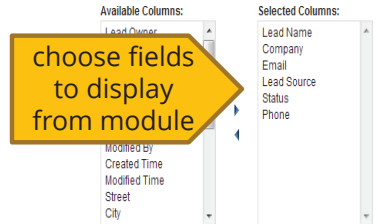
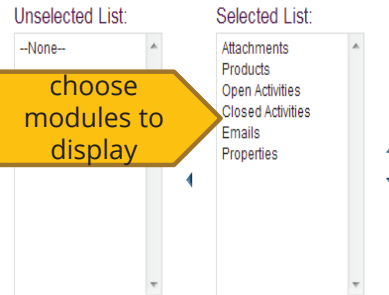
# Related List View

In each module the displaying of related info (from other modules) can be customized.

Zoho CRM



related info sections



# Search Layout

Every module in Zoho CRM allows a search option with some standard fields. However, based on an organization's requirement, the search criteria can be customized by enabling additional fields in the search layout.

The image shows two screenshots from Zoho CRM. The left screenshot is the 'Search Layout' configuration page for the 'Leads' module. It lists various fields with checkboxes to enable or disable them for search. A yellow callout box with an arrow points to the 'Company' field, which is checked, and contains the text 'Choose fields'. The right screenshot shows the search results for the query 'Bob', displaying a table of matching leads.

**Search Layout Configuration:**

Field Name	Fields
Lead Owner	<input type="radio"/>
Company	<input checked="" type="checkbox"/>
First Name	<input type="radio"/>
Last Name	<input type="radio"/>
Title	<input type="radio"/>
Email	<input checked="" type="checkbox"/>
Phone	<input checked="" type="checkbox"/>
Mobile	<input type="radio"/>
Website	<input type="radio"/>
Lead Source	<input checked="" type="checkbox"/>
Lead Status	<input type="checkbox"/>

**Search Results:** " Bob "

Company	Email	Phone	Lead Source	Full Name
Bridgford Foods Corporation	bob.delong@samplecompany.com	888-555-7769		Bob DeLong
AmerisourceBergen Corporation	bob.c@gmail.com	888-555-5656	Trade Show	Bob Colson

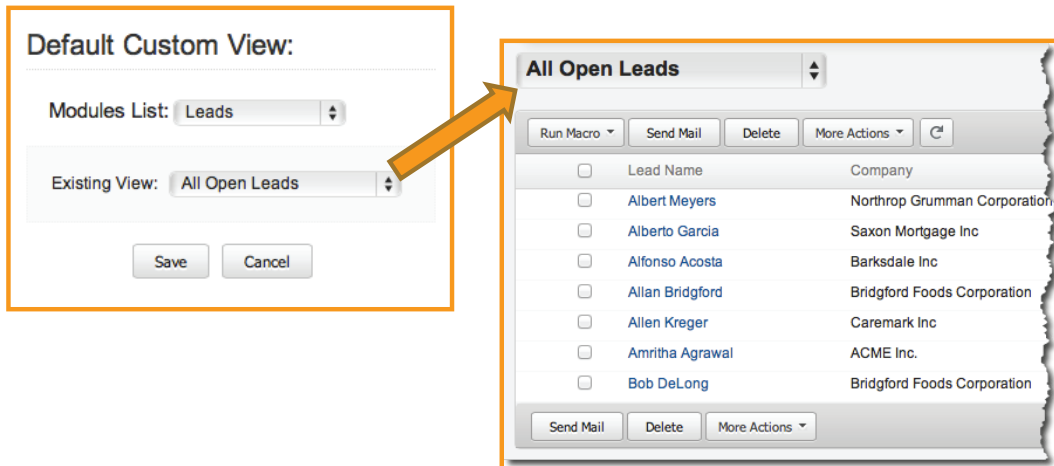
**Hint:** Click on **Setup >> Customization >> Search Layout >>** select the options based on modules >> **Save**



Maximum of 6 search criteria fields are allowed for global search option.

# Custom Views

This option enables customizing the default view for the modules depending on individual user's choice. Once the default view is customized, the new chosen view becomes the default view displayed whenever the module is accessed. For instance, the default view for Leads module could be "All Open Leads"



The image shows two screenshots from a CRM system. The left screenshot is a configuration window titled "Default Custom View:". It has a "Modules List:" dropdown menu with "Leads" selected. Below it is an "Existing View:" dropdown menu with "All Open Leads" selected. At the bottom are "Save" and "Cancel" buttons. An orange arrow points from the "Existing View:" dropdown to the right screenshot. The right screenshot shows the "All Open Leads" view in the Leads module. It features a header with "All Open Leads" and a dropdown arrow. Below the header is a toolbar with buttons for "Run Macro", "Send Mail", "Delete", and "More Actions". The main area is a table with columns "Lead Name" and "Company". The table contains seven rows of lead data, each with a checkbox in the first column. At the bottom of the table is another toolbar with "Send Mail", "Delete", and "More Actions" buttons.

**Default Custom View:**

Modules List: Leads

Existing View: All Open Leads

Save Cancel

**All Open Leads**

Run Macro Send Mail Delete More Actions







<input type="checkbox"/>	Lead Name	Company
<input type="checkbox"/>	Albert Meyers	Northrop Grumman Corporation
<input type="checkbox"/>	Alberto Garcia	Saxon Mortgage Inc
<input type="checkbox"/>	Alfonso Acosta	Barksdale Inc
<input type="checkbox"/>	Allan Bridgford	Bridgford Foods Corporation
<input type="checkbox"/>	Allen Kreger	Caremark Inc
<input type="checkbox"/>	Amritha Agrawal	ACME Inc.
<input type="checkbox"/>	Bob DeLong	Bridgford Foods Corporation

Send Mail Delete More Actions

**Hint:** Click on **Setup >> Customization >> select Module settings>> Customize View Settings >> select New View** from the drop down list >> **Save**

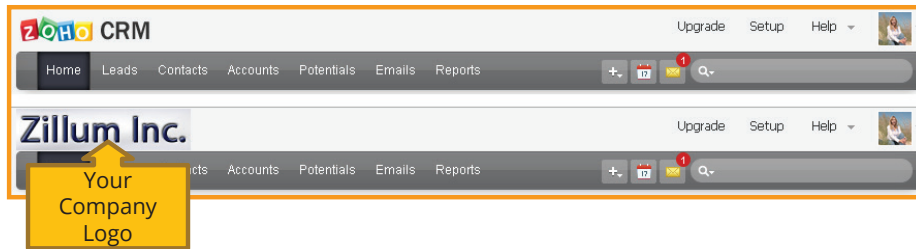
# Company-level

In product customization there are certain organization-specific details to which only the administrator can have access. These admin level customizations are explained below:

-  Company Logo
-  Custom Links
-  Related List Views
-  Search Layout
-  Custom Views
-  Business Card View

# Company Logo

In order to give a personalized look to CRM account, Zoho CRM allows organizations to change the default Zoho CRM logo by personal company logo.



**Hint:** Click on **Setup >> Organization Settings >> Company Details >> Edit >> Company Logo >> Save**



Adding company logo necessarily requires a defined company name and converting from single user edition to corporate edition.

# Currency

By default, the currency is set as US Dollar (\$). However, this can be customized as per organization's fiscal currency settings.

### Currencies

Home Currency: **US Dollar - USD**      Format: **\$ 1,234,567.89** [Customize](#)

[Add Currency](#)

Name	Symbol	Exchange Rate	Last Modified By
Algerian Dinar - DZD	DA	0.97	Patricia Boyle on 03/29/2012 04:52 AM
Indian Rupee - INR	₹	51.39	Patricia Boyle on 03/29/2012 04:51 AM
Japanese Yen - JPY	¥	82.28	Patricia Boyle on 03/29/2012 04:51 AM
Australian Dollar - AUD	AU\$	0.96	Patricia Boyle on 03/29/2012 04:53 AM

Other Currencies

**Hint:** Click on **Setup >> Organization Settings >> Currencies >> manage currencies >> Save**



In Professional and Free Editions, only single currency is allowed for all users. Where as in Enterprise Edition, multiple-currencies (up to 10) can be configured.

# Fiscal Year

This option allows configuring your fiscal or financial Year settings according to organization's fiscal cycle. Once the fiscal start month is selected, fiscal quarters are automatically rolled up in forecasting and sales pipeline reports.

Select Fiscal Start Month

Fiscal Start Month : March

Display Fiscal Year Based on :  Start Month  End Month

Save

Fiscal Year starts in March

**Hint:** Click on **Setup >> Organization Settings >> Fiscal Year >> Submit >> Ok**



Changing the Fiscal Start Month affects change in the new as well as the existing Forecast records.

# User-level Customization

The User-level customization allows any Zoho CRM user to personalize settings within the limitations defined in the Roles. Some of the commonly allowed user-level customizations are:

- Home Page
- Language
- Date Format
- Time Zone
- Signature
- Name Format
- Theme
- Summary View

# Home Page

The home page customization allows users to set the home page layout as per their requirements and priority. This customization allows to change view settings, add, modify and remove components. The section layout can be modified by editing the column layout and view of the displayed components.

The screenshot shows a CRM home page with a navigation bar at the top containing: Home, Leads, Opportunities, Contacts, Accounts, Activities, Work Orders, Reports, Dashboards, and Emails. Below the navigation bar is a welcome message: "Welcome Bence Ortai at VWo Inc.". The main content area is divided into two panels. The left panel, titled "Todays Leads", contains a table of leads. The right panel, titled "Pipeline by Stage", contains a funnel chart. Annotations in yellow callout boxes identify these panels: "add new panel" points to a button in the top right, "list based panel" points to the leads table, and "chart (visual)" points to the funnel chart. A legend below the chart identifies the stages: Potential Created (yellow), Negotiations (blue), Needs Analysis (red), Will Close (orange), and Proposal Sent (green).

Lead Status	Lead Name	Company	Phone	State	Modified By	Lead Ty
Open	Mario Lachapelle	MarioLachapelle/Avocat	450-691-2679	QC	Joey Juarez	Google Sourcec VSB
Open	Gray	Sola Salons	702-900-7129		Joey Juarez	
Open	Esateys Stuchiner	The Ultimate Results Academy	5038661927		Andrew Racine	
Open	Heather Gibson	Endless Pleasure	(317)717-8956		Joey Juarez	

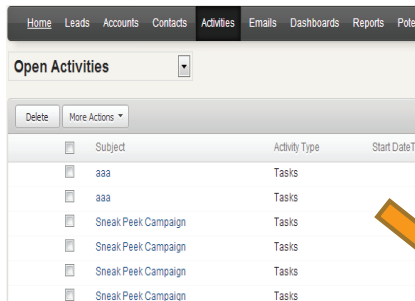
Stage

- Potential Created
- Negotiations
- Needs Analysis
- Will Close
- Proposal Sent

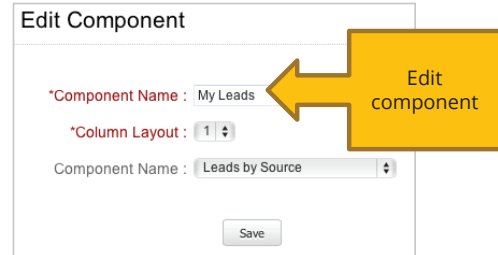
# Home Page

The Home Screen can have panels based on

- (Custom) Views from modules



<input type="checkbox"/>	Subject	Activity Type	Start Date Time
<input type="checkbox"/>	aaa	Tasks	
<input type="checkbox"/>	aaa	Tasks	
<input type="checkbox"/>	Sneak Peek Campaign	Tasks	
<input type="checkbox"/>	Sneak Peek Campaign	Tasks	
<input type="checkbox"/>	Sneak Peek Campaign	Tasks	
<input type="checkbox"/>	Sneak Peek Campaign	Tasks	



**Edit Component**

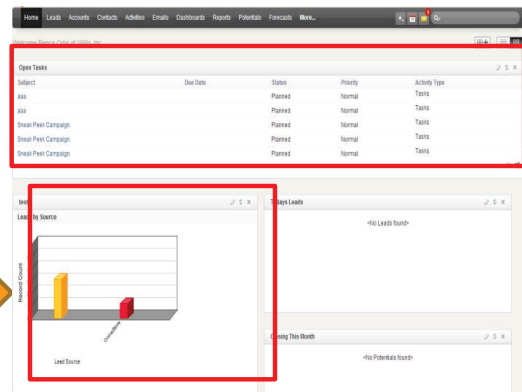
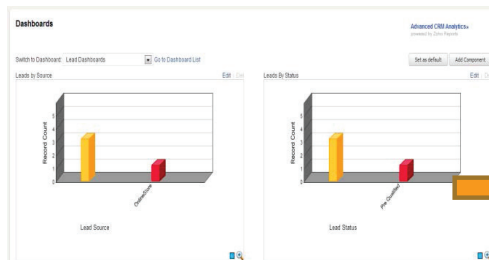
\*Component Name : My Leads

\*Column Layout : 1

Component Name : Leads by Source

Save

- Dashboards



**Open Tasks**

Select	Due Date	Status	Priority	Activity Type
<input type="checkbox"/>		Planned	Normal	Tasks
<input type="checkbox"/>		Planned	Normal	Tasks
<input type="checkbox"/>		Planned	Normal	Tasks
<input type="checkbox"/>		Planned	Normal	Tasks
<input type="checkbox"/>		Planned	Normal	Tasks

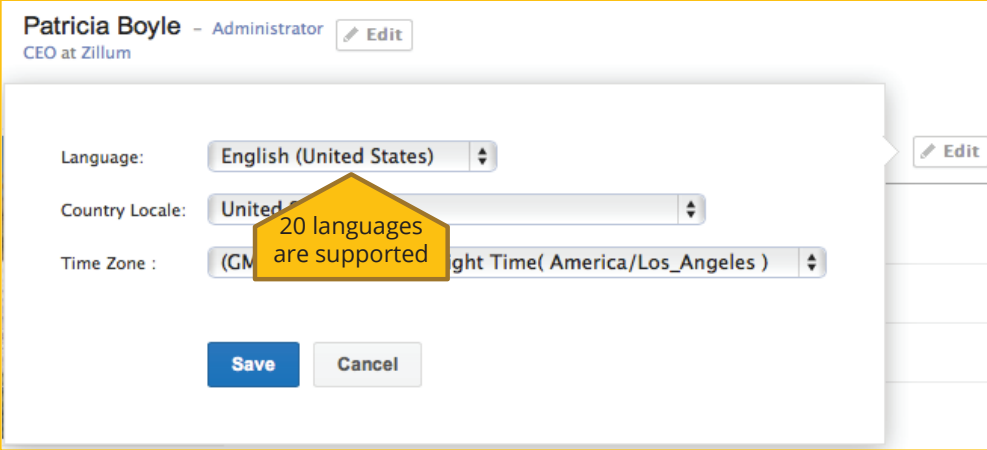
**Leads by Source**

**Days Leads**

**Leads This Month**

# Language

The default Zoho CRM language can be personalized as per user preference. This language change will be visible across the CRM system.



The screenshot shows the user profile settings for Patricia Boyle, Administrator, CEO at Zillum. The settings are displayed in a modal window with a yellow border. The settings include:

- Language:** English (United States)
- Country Locale:** United States
- Time Zone:** (GMT-8) Pacific Standard Time( America/Los\_Angeles )

At the bottom of the modal are **Save** and **Cancel** buttons. A yellow callout box with a house-shaped pointer points to the language dropdown menu, containing the text "20 languages are supported".

**Hint:** Click on **Setup >> Personal Settings >> Account Information >> Edit >> Language >> Save**

# Date Format

The default date format can be changed as per organization's date & time standard. The date format is updated based on the selected country locale. The supported international date formats are:

Patricia Boyle - Administrator [Edit](#)  
CEO at Zillum

Language: English (United States) [Edit](#)

Country Locale: United States

Time Zone : (GMT Time( America/Los\_Angeles )

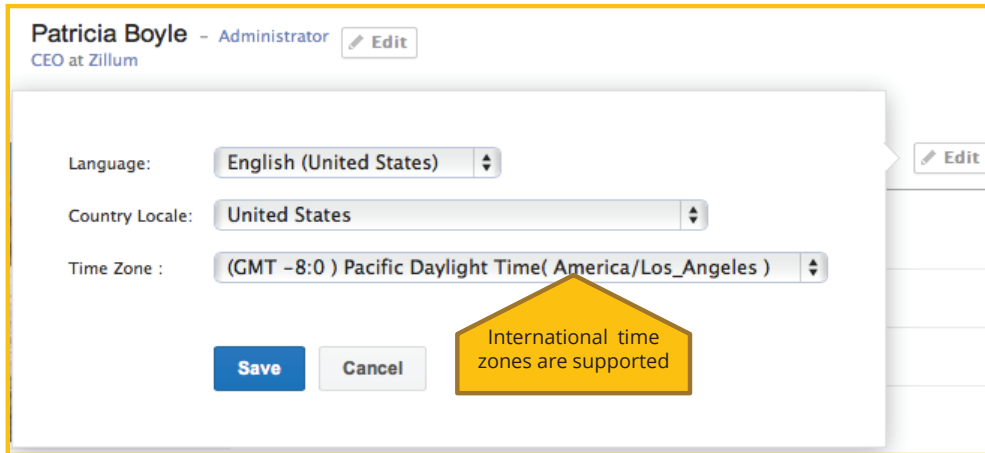
Date format as per country

[Save](#) [Cancel](#)

**Hint:** Click on **Setup >> Personal Settings >> Account Information >> Edit >> Country Locale >> Save**

# Time Zone

Time zone settings allow users the flexibility to choose the organizational time or the geographically located time zones. This setting affects the calendar time, the events and scheduled meetings.



The screenshot shows the user profile settings for Patricia Boyle, Administrator, CEO at Zillum. The settings are displayed in a white box with a yellow border. The settings include:

- Language: English (United States)
- Country Locale: United States
- Time Zone: (GMT -8:0) Pacific Daylight Time( America/Los\_Angeles )

There are 'Save' and 'Cancel' buttons at the bottom. A yellow callout box points to the Time Zone dropdown with the text: 'International time zones are supported'. An 'Edit' button is visible on the right side of the settings box.

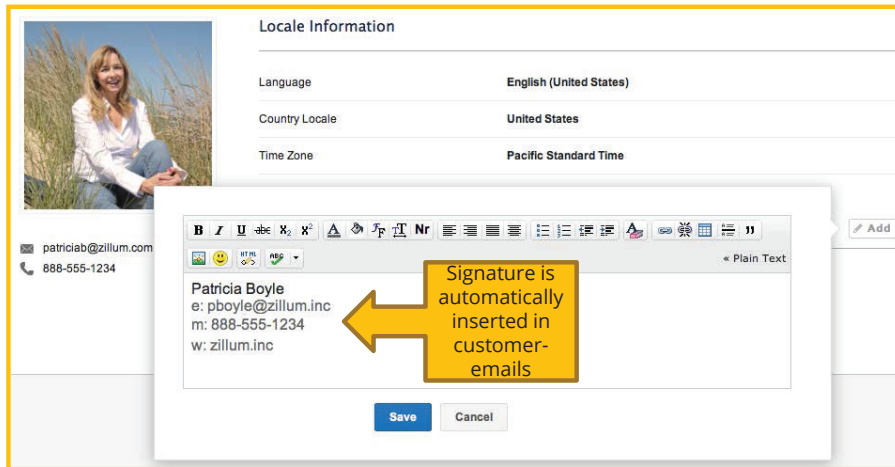
**Hint:** Click on **Setup >> Personal Settings >> Account Information >> Edit >> Time Zone >> Save**



Changes made in the Time zone settings immediately reflect upon the existing events and other time defined tasks.

# Signature

The signature option allows to embed a signature automatically in the message body while sending emails to customers. This option works on per user basis.



The screenshot displays a user profile interface. On the left, there is a profile picture of a woman and contact information: email (patriciaab@zillum.com) and phone number (888-555-1234). On the right, under 'Locale Information', the following details are shown:

Language	English (United States)
Country Locale	United States
Time Zone	Pacific Standard Time

Below this is a signature editor window. It features a rich text toolbar and a text area containing the signature: Patricia Boyle, e: pboyle@zillum.inc, m: 888-555-1234, w: zillum.inc. A yellow callout box with an arrow points to the signature text, stating: 'Signature is automatically inserted in customer-emails'. The editor also includes 'Save' and 'Cancel' buttons.

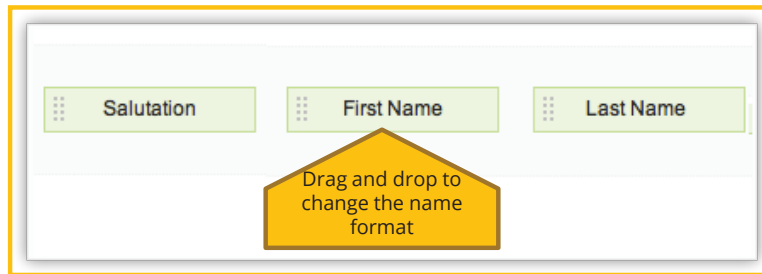
**Hint:** Click on **Setup >> Personal Settings >> Signature >>** specify in the HTML editor >> **Save**



It is necessary to enable the active check box to use the signature.

# Name Format

The name format defines the way of addressing people. This option allows users to customize name format as per the applicable naming conventions within their country. For instance, in countries like Japan the salutation comes after the name.



**Hint:** Click on **Setup >> Personal Settings >> Name Format >> Change the format >> Save**

**Note:** Defining multiple name formats is not allowed

# Theme

The theme defines the look & feel of CRM user interface. Users can personalize tab colors to suit their taste.

**1**


**Background**


Default  Gray  White


**2**


**Tab Bar**

Default  Custom

Normal Tab 

Normal Tab Font 

Selected Tab 

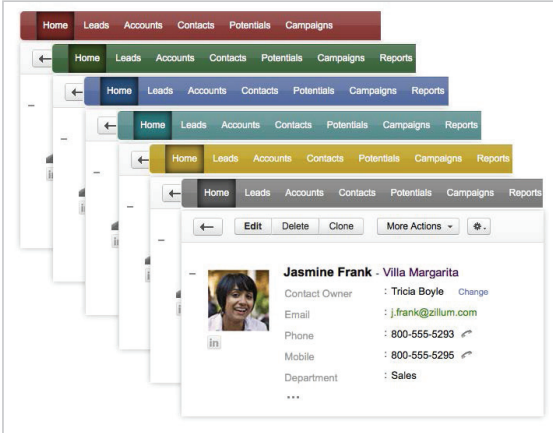
Selected Tab Font 

**3**

**Layout**

Default  Fit to Screen

→



**Hint:** Click on **Setup >> Personal Settings >> Themes >> Change the look & feel >> Save**

CRM Administrator cannot set a single theme for all users.

# Do It Yourself

## Exercise 1

You run a Real Estate business and you have been assigned to customize the Zoho CRM modules as per your requirements.

**You are expected to select modules, rename tabs, manage fields and customize page layout for any one of the modules.**

## Exercise 2

In the New Lead page define a column by the name of 'Remarks' so that anyone filling up the lead page can give his/her remarks here for later reference. This column should span across.

**You are expected to customize page layout and select the 'top - down' option in the section information.**

# Things to Remember

- Pre-customization stage sets up the organization's requirements.
- All tabs, except the home tab can be made visible / hidden and renamed.
- Zoho CRM provides customization for the standard fields, custom fields and special fields.
- Each module can have maximum of 130 custom fields added.
- The related lists provide a 360° view of all the modules.
- In the customize search option, maximum of 6 search criteria fields are allowed.
- Adding company logo necessarily requires a defined company name and converting from single user edition to corporate edition.
- Changing the Fiscal Start Month affects change in the new as well as the existing Forecast records.

# Things to Remember

- Personalizing language is based on user's preference.
- The date format is updated based on the selected country locale.
- In order to use signature, it is necessary to enable the active check box.
- While customizing name format multiple name formats are not allowed.
- Some data fields can not be removed (customized).
- The number of custom fields allowed system-wide is limited by
  - The field types.
  - Your Zoho CRM edition.
- Custom Fields will be visible in the mobile apps.
- Custom Views will be visible in the mobile apps.
- Custom Module Names and module orders are NOT visible in the Mobile app or in most integrations.

# Test Yourself

1. Which one of the following tabs cannot be hidden in the Zoho CRM setup?
  - Leads
  - Home
  - Activities
  - Contacts
  - Products
2. When some of the modules are hidden, they are visible to:
  - User with Admin profile
  - All the active Users
  - No users
  - Other CRM users
  - Customers
3. Once the tabs are renamed, they are visible with the new name in
  - All modules
  - All Modules except Products and Invoices
  - All Modules except Reports and Dashboards
  - All Modules within the Admin profile
  - None of the modules

4. Custom fields cannot be added for \_\_\_\_\_ and \_\_\_\_\_ modules.

- Leads
- Tasks
- Accounts
- Events
- Contacts

5. Based on any organization's requirement, the maximum limit for search criteria fields are :

- 18
- 26
- 6
- Unlimited
- None of the above

6. Which one of the following meets one of the criteria to personalize logo?

- Should have a paid user
- Should have a company name
- Should have an active email Id
- Should permission from the Zoho CRM development team
- None of the above

7. The default fiscal start month in Zoho CRM is set to:

- March
- April
- January
- December
- February

8. Language can be customized based on:

- Selected country locale
- Admin permissions
- Individual user's preference
- Company's approval
- None of the above

# Online Resources

- <http://www.zoho.com/crm/help/customization/>
- <http://www.zoho.com/crm/help/miscellaneous/web-tabs.html>
- <http://www.zoho.com/crm/help/administration/personal-settings.html>
- <http://www.zoho.com/crm/help/administration/organization-settings.html>

# Zoho CRM

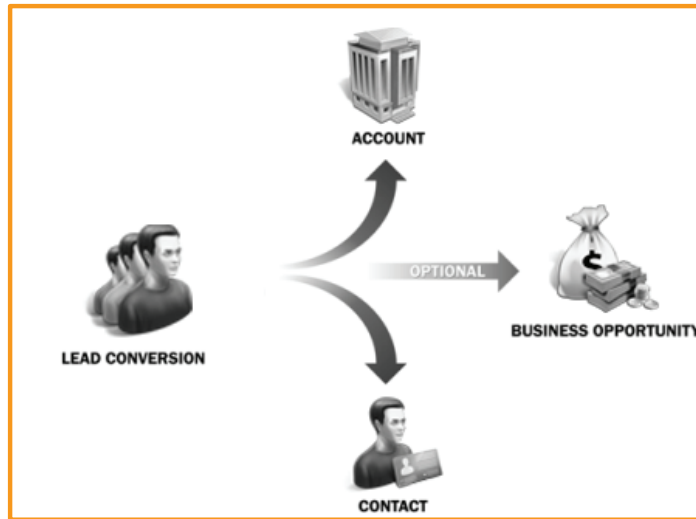
## Advanced Customization

# Session Schedule

- Lead Conversion Mapping
- Dependency Picklists
- Stage-Probability Mapping
- Contact Roles
- Formula Fields
- Custom Related Lists
- Copy Customization

# Lead Conversion Mapping

When lead shows interest to buy your product or service, convert lead to prospect. On conversion, all the lead details are automatically and transferred to account, contact, and potential if you properly map them in. You can accurately map these modules and corresponding fields easily using lead conversion mapping tool.



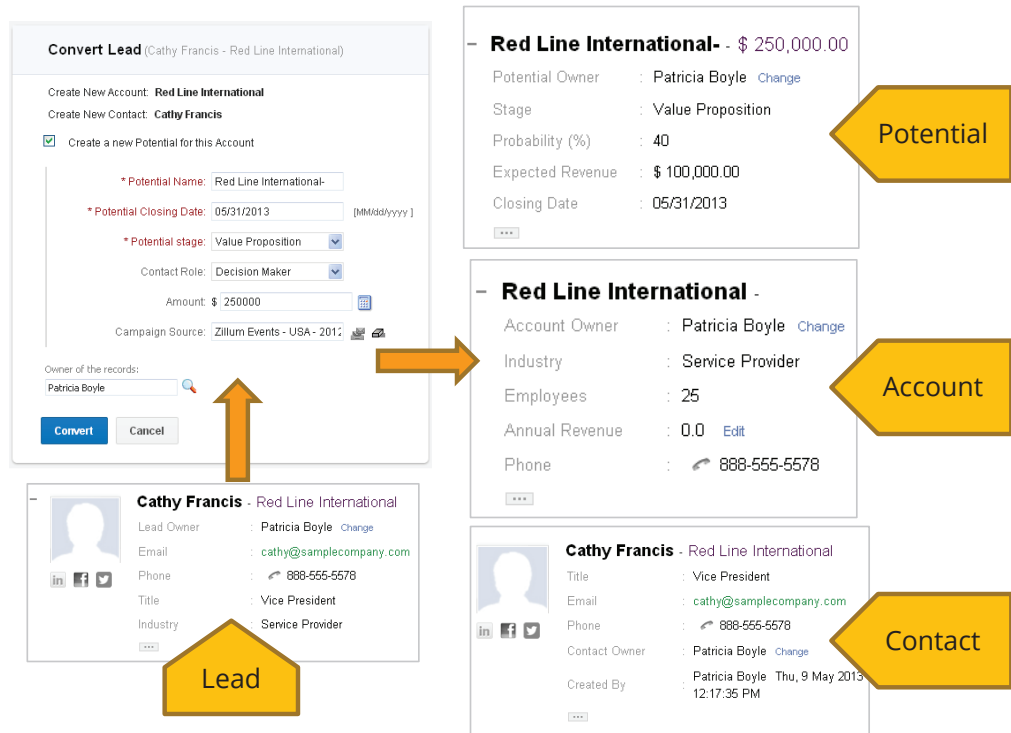
# Mapping Fields

**Mapping Information** \* Custom Field

Lead Field	Account Field	Contact Field	Potential Field
City:	Billing City	Mailing City	-None-
Country:	Billing Country	Mailing Country	-None-
Description:	Description	Description	Description
Title:	-None-	Title	-None-
Email:	-None-	Email	-None-
Email Opt Out:	-None-	Email Opt Out	-None-
Industry:	Industry	-None-	-None-
Lead Source:	-None-	Lead Source	Lead Source
Mobile:	-None-	Mobile	-None-
Phone:	Phone	Phone	-None-

**Hint:** Click on **Setup >> Customization >> Fields >> Leads >> Map Fields >> Update Fields >> Save**

# Converting Lead to Potential



**Hint:** Click on Leads >> Lead >> Convert >> Follow the steps >> Convert

# Dependency Picklists

There are certain fields whose values depend on another field's value. For example, the values for the Sub-Industry field will depend on the Industry field that you select. In Zoho CRM, you can easily set up this type of dependency fields by using two picklist fields.



**Hint:** Field dependencies can determine the available options in one drop down based on the value selected in another one.

# Customizing Picklists

1

Create picklist value type custom fields (example: Industry and Sub-Industry) in required module.

The diagram illustrates the process of creating a child field from a parent field. On the left, a 'Parent field' is shown as a list of four categories: Banking, Media, Services, and Technology. An arrow points from this parent field to a 'Child field' configuration window. The 'Child field' window is titled 'Leads: Create Custom Field' and is divided into two sections: 'Select Field Type:' and 'Provide Field Details:'. In the 'Select Field Type:' section, 'Pick List' is selected. In the 'Provide Field Details:' section, the 'Label' is 'Sub-Industry', the 'Section Name' is 'Lead Information', and the 'Pick List Values' are a list of industry categories including Big-Cap Banks, Mid-Cap Banks, Regional Banks, Advertising & Marketing, Broadcasting - TV & Radio, Diversified Media, Entertainment, Business Services, Catering, Cleaning & Repair, Childcare, Consumer Services, Data Processing, Computer Peripherals, Computers, Internet Products & Services, Networking, and Software & Services. An arrow points from the 'Child field' label to the 'Pick List Values' list.

**Hint:** Click on **Setup >> Customization >> Fields >> Module >> Map Fields >> Complete steps**

2

Map dependency pick list fields and corresponding values.

### Map Dependency Fields for Leads

\*Parent Field

\*Child Field

1. Map Fields

### Leads : Edit Page Layout

Lead Information

Lead Owner	Company
First Name	Last Name
Title	Email
Phone	Lead Status
Industry	Sub-Industry
Lead Source	No of Employees
Email Opt Out	Secondary Email
Website	Created By
Modified By	Skype ID
Mobile	Twitter
Currency	Exchange Rate

3. Page Layout

### Map Dependency Fields for Leads

[Previous](#) | [Next](#)

Industry:	-None-	Banking	Media	Services
Sub-Industry:	-None- Big-Cap Banks Mid-Cap Banks Regional Banks	-None- Big-Cap Banks Mid-Cap Banks Regional Banks	Advertising & Marketing Broadcasting - TV & Radio Diversified Media Entertainment	Business Services Catering, Cleaning & Repair Childcare Consumer Services

2. Map Values

# Using Dependency Picklists

- 3 In Lead page, choose a value from the parent and corresponding value from dependency picklist.

**Edit Lead**

Lead Information

Lead Owner: Patricia Boyle	*Company: AmerisourceBergen Corporation
First Name: -None- Bob	*Last Name: Colson
Title: Network Director	Email: bob.c@gmail.com
Phone: 888-555-5656	Lead Status: Contacted
Industry: Technology	Sub-Industry: Data Processing
Lead Source: Tr	No of Employees: 20
Email Opt Out: <input checked="" type="checkbox"/>	Secondary Email:
Website:	Skype ID:

Parent Field

Child Field

# Stage-Probability Mapping

Defining the criteria for Sales Stage is important to identify the performance of an organization-wide Sales pipeline. Stage probability can be determined based on two important factors - Forecast Type and Forecast Category. These two values are useful in describing the stage of a potential.

Field Information:

Field Name: **Stage**

Options List: [+ Add Stage](#) | [- Delete Stage](#)

<input type="checkbox"/>	Stage Name	Probability (%)	Sort Order	Forecast Type	Forecast Category
<input type="checkbox"/>	-None-	0	1	Open	Pipeline
<input type="checkbox"/>	Qualification	10	2	Open	Pipeline
<input type="checkbox"/>	Needs Analysis	20	3	Open	Pipeline
<input type="checkbox"/>	Value Proposition	40	4	Open	Pipeline
<input type="checkbox"/>	Id. Decision Makers	60	5	Open	Pipeline
<input type="checkbox"/>	Proposal/Price Quote	75	6	Open	Pipeline
<input type="checkbox"/>	Negotiation/Review	90	7	Open	Pipeline
<input type="checkbox"/>	Closed Won	100	8	Closed Won	Closed
<input type="checkbox"/>	Closed Lost		9	Closed Los	Omitted
<input type="checkbox"/>	Closed Lost to Co		10	Closed Los	Omitted

Forecast Category

Probability Value

**Hint:** Click on **Setup >> Customization >> Fields >> Potentials >> Stage-Probability Mapping >> Update Fields >> Save**

# Using Stage-Probability

The screenshot shows a CRM interface for editing a potential. The form is titled 'Edit Potential' and contains various fields for potential information. Three red circles with numbers 1, 2, and 3 are placed over the 'Amount', '\*Stage', and 'Expected Revenue' fields respectively. A yellow arrow points from the 'Expected Revenue' field to the text 'Probability value automatically changes'.

**Edit Potential**

Potential Information

Potential Owner: Patricia Boyle

\*Potential Name: Red Line International-

\*Account Name: Red Line International

Type: -None-

Lead Source: Seminar-Internal

Contact Name: Cathy Francis

Currency: USD

Amount: \$ 250000

\*Closing Date: 05/31/2013

\*Stage: Value Proposition

Probability (%): 40

Expected Revenue: \$ 100000

Campaign Source: Zillum Events - USA - 2012

Exchange Rate:

Probability value automatically changes

$$\text{Expected Revenue} = \text{Amount} * \text{Probability}/100$$

# Contact Roles

Customization of Contact Roles help you knowing the role of the contact in the prospective organization so you always have the right conversation and close more deals. For instance, negotiating price and discounts is always better with the Purchasing Officer than standard users of your prospective customer company.

Contact Roles	
<input type="checkbox"/>	Developer/Evaluator
<input type="checkbox"/>	Decision Maker
<input type="checkbox"/>	Purchasing
<input type="checkbox"/>	Executive Sponsor
<input type="checkbox"/>	Engineering Lead
<input type="checkbox"/>	Economic Decision Maker
<input type="checkbox"/>	Product Management

**Hint:** Click on **Setup >> Customization >> Fields >> Potentials >> Contact Roles >> Update Fields >> Save**

# Using Contact Roles in Potential

Contact Roles					
	Contact Name	Account Name	Phone	Email	Role Name
<a href="#">Remove</a>	Peggy Augspurger	Villa Margarita	800-555-0106	a.peggy@samplecompany.com	Developer/Evaluator
<a href="#">Remove</a>	Jasmine Frank	Villa Margarita	800-555-5293	jasminef@zillum.com	Decision Maker
<a href="#">Add Contact Roles</a> <a href="#">Edit All</a>					

Contact Roles Mapping		
List of Contact roles		
Contact Name	Account Name	Contact Roles
<input type="checkbox"/> Peggy Augspurger	Villa Margarita	Developer/Evaluator
<input type="checkbox"/> Jasmine Frank	Villa Margarita	Developer/Evaluator
<a href="#">More Contact</a>		

# Formula Fields

Formula fields help you to define fields that can populate dynamically calculated value based on the data returned from other standard or custom fields. For instance, an insurance company may need to determine, if the provided date of birth (by policy holders), confirms their eligibility to own a policy based on their present age.

Label: Transaction Code

Section Name: Product Information

Formula Return Type: String

**Construct your formula:**

Select function :	Select field :	Select operator :
All functions Substring Tostring Replace Newdate Datepart Timepart Adddate Subdate	Support Start Date Support Expiry Date Created By Modified By Created Time Modified Time Product Size Product Color <b>Price Information</b> Unit Price	+ Add - Subtract * Multiply / Divide % Remainder ^ Exponentiation ( Open parenthesis ) Close parenthesis != Not equal = Equals

**Function Syntax :**  
Function : ToString  
Description : Converts any argument to a string data type.  
Usage : ToString(generic)  
Examples : ToString( 3.4 ) gives result as '3.4'

Formula Expression=  
Concat(Tostring({Products.Product Code}),Tostring({Products.Product Size}),Tostring({Products.Product Color}))

Check syntax

Your Formula Editor

# Using Formula Fields

Product Information			
Product Owner:	<a href="#">Patricia Boyle</a> <a href="#">Change</a>	Product Name:	Dexter Plain - Formal Shirt
Product Category:	Men	Vendor Name:	<a href="#">Zenith Manufacturers</a>
Product Code:	ST441	Manufacturer:	MetBeat Corp
Product Size:	M	Product Active:	✓
Product Color:	Beige	Unit Price:	\$ 50.00
Transaction Code:	ST441MBeige	Created By:	<a href="#">Patricia Boyle</a> Tue, 8 Nov 2011 01:20:14 AM
Sales End Date:	05/31/2013	Sales Start Date:	05/01/2013
Support Expiry Date:	05/31/2013	Support Start Date:	05/10/2013
Modified By:	<a href="#">Patricia Boyle</a> Fri, 10 May 2013 06:25:44 AM		

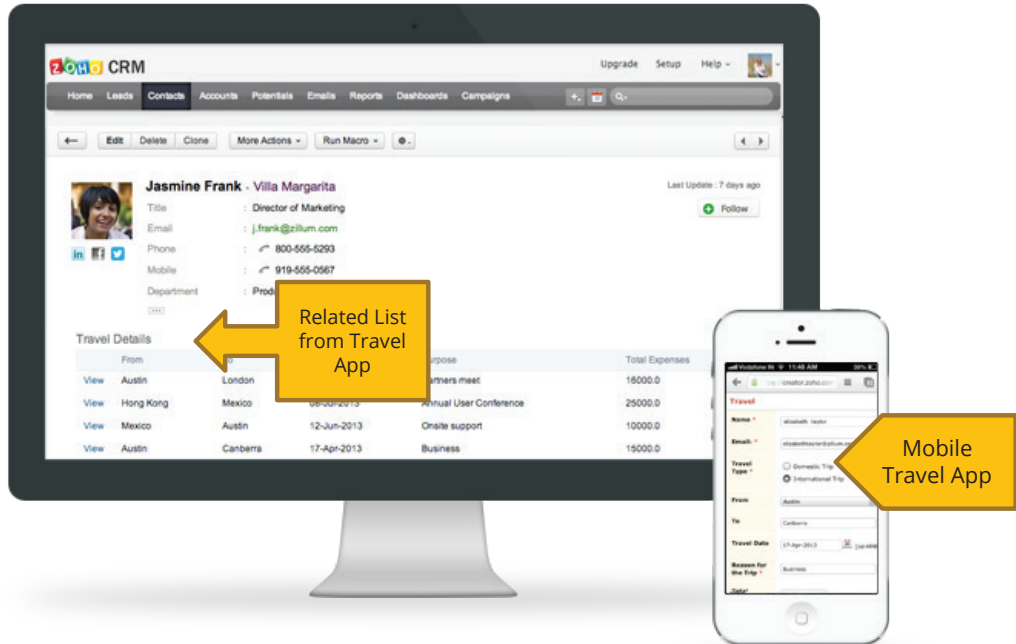
The diagram illustrates the concatenation of three fields into a single field. A yellow box with the text "Concatenated above fields into single field" has an arrow pointing to the Transaction Code field. The Transaction Code field contains the value "ST441MBeige", which is the concatenation of the Product Code "ST441", Product Size "M", and Product Color "Beige".

# Custom Related Lists

For a better 360-degree view of customer, you can associate customer record with other CRM modules. For example, potentials, activities, attachments, etc. can be associated to account or contact. These standard related lists are available in all editions. In addition, you can add custom related lists pulling data from 3<sup>rd</sup> party applications using gallery functions or writing your own program through Deluge Script.

The image shows a screenshot of a CRM interface. On the left, there is a panel titled "Add Related List" with three options: "Custom Functions" (with a document icon), "Custom Apps" (with a document icon), and "Unselected Related Lists" (with a document icon). An orange arrow points from the "Custom Apps" option to the right. On the right, there is a panel titled "Custom Apps" with three entries: "Creator - CRM Integration" with an "Add now" button, "Expenses" with an "Add now" button, and "Travel App" with an "Add now" button.

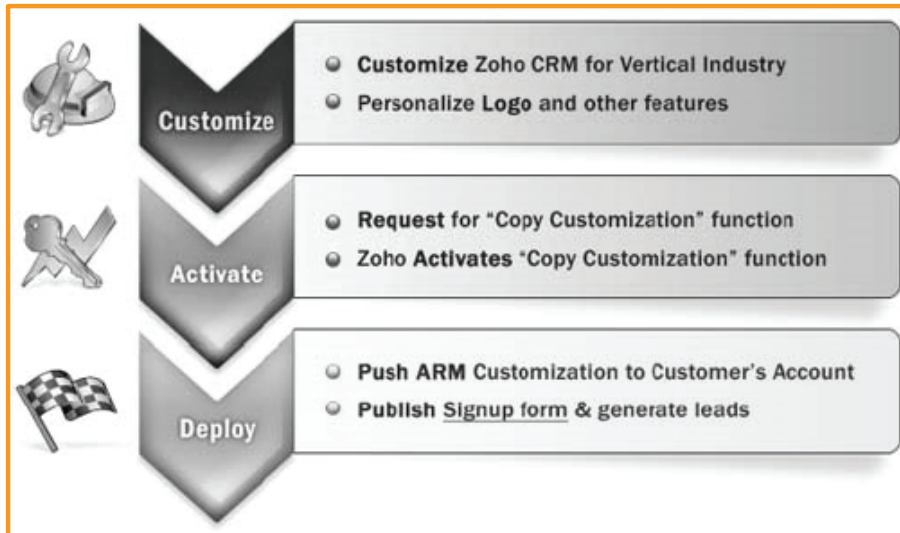
# Viewing Custom Related List



**Hint:** Click on **Sales Module** >> **Record** >> **More Actions** >> **Add Related List** >> Complete the process >> **Save**

# Copy Customization

The Copy Customization functionality helps CRM experts to customize CRM as per industry-specific requirements, and then deploy the customized CRM into other related CRM accounts. System-level configurations are to the target accounts.



**Hint:** Click on **Setup >> Organization >> Copy Customization >>** Complete steps

# Online Resources

- <http://www.zoho.com/crm/help/customization/>
- <http://www.zoho.com/crm/help/miscellaneous/web-tabs.html>
- <http://www.zoho.com/crm/help/administration/personal-settings.html>
- <http://www.zoho.com/crm/help/administration/organization-settings.html>
- <http://www.zoho.com/crm/help/leads/convert-leads.html>



# Sales Tracking & Forecasting

---

## Session schedule



Sales overview



Leads and Potentials



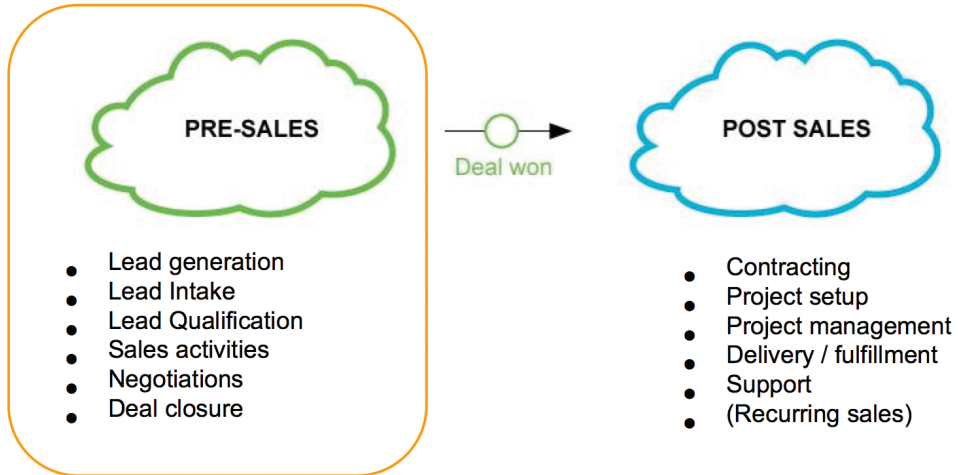
Forecasts



Activities

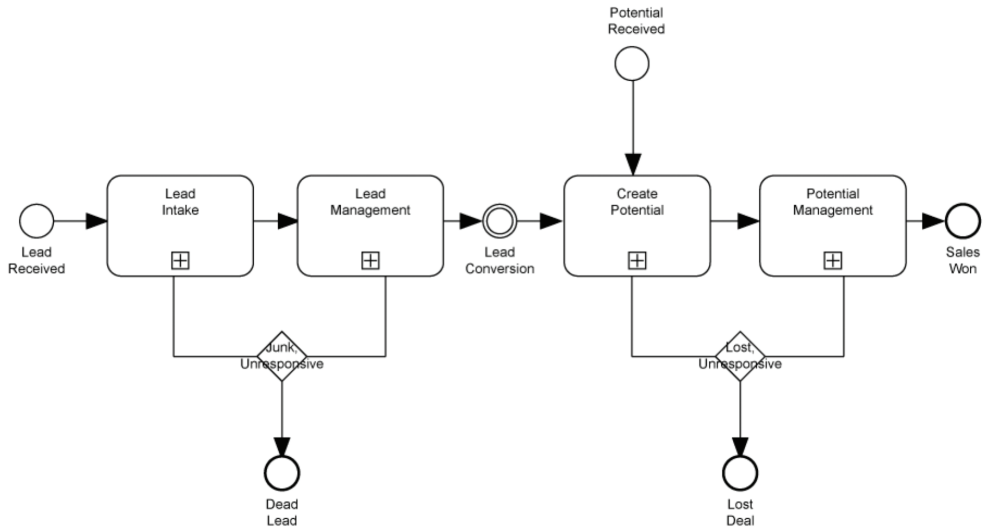
# Sales overview

A typical sales process



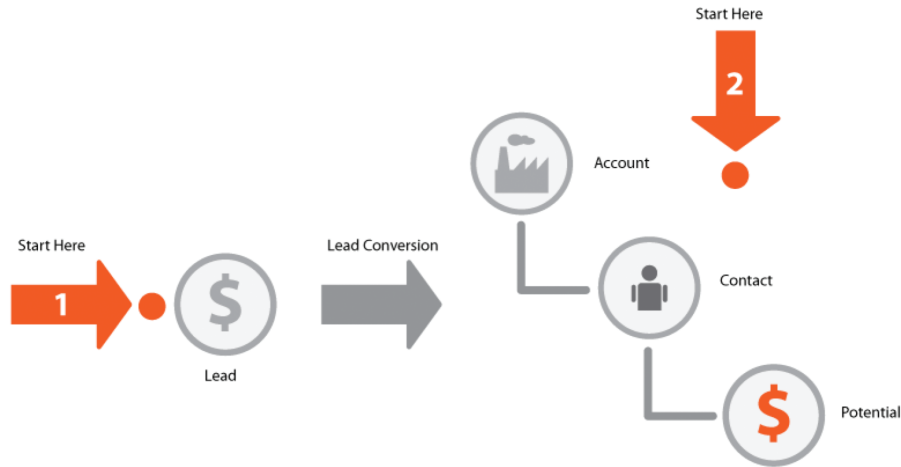
# Sales overview

## Pre-sales workflow



# Sales overview

## Creating sales objects in Zoho CRM



- start with a LEAD or skip to creating a CONTACT - depends on how your sales works
- a LEAD can be converted to ACCOUNT+CONTACT+POTENTIAL

# Working with LEADs



## LEAD

- a generic business interest
- info may not be complete
- info may be junk
- it is a "catch-all" object
- lifecycle: short

needs qualification: use standard criteria to determine if the Lead is worth pursuing (dedicate time and effort)

# Lead conversion



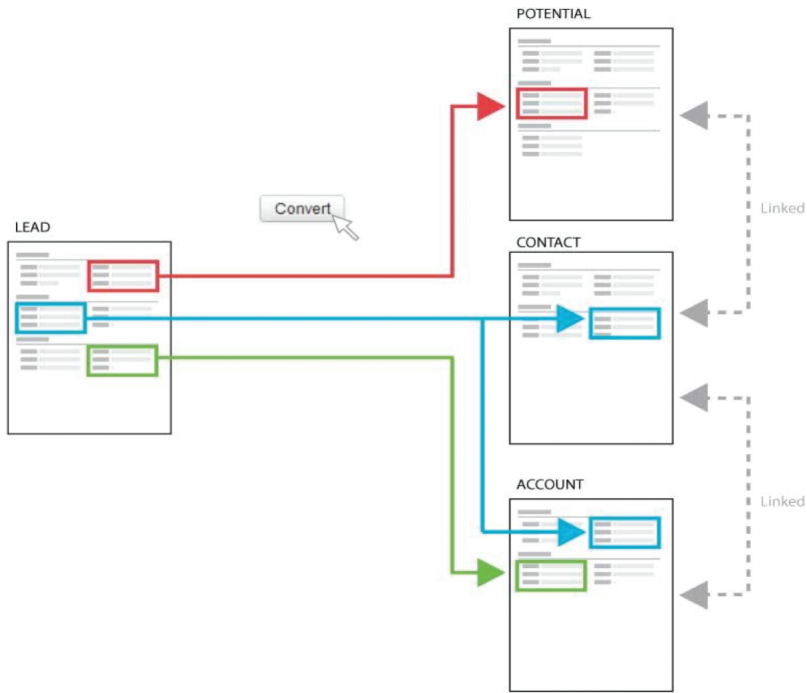
## Convert Lead into a Potential

- sufficient information is present
- has been evaluated against the qualifying criteria (=Qualified)

## "upgrade" the info from the Lead into a:

- Contact
- Account (if Company name is supplied)
- Potential (optional)

# Lead conversion



# Live demo



## Switch to Zoho CRM and demo:

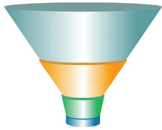
- create Lead
- create a Task for the Lead to demo how it is preserved in conversion .
- convert a Lead into an Account, Contact and Potential

# Working with POTENTIALS



## POTENTIAL (a.k.a. "Opportunity", "Project")

- a qualified business opportunity
- basic info must be present
- has a \$ value assigned
- has an expected close date
- attached to a Contact
- lifecycle: could be long

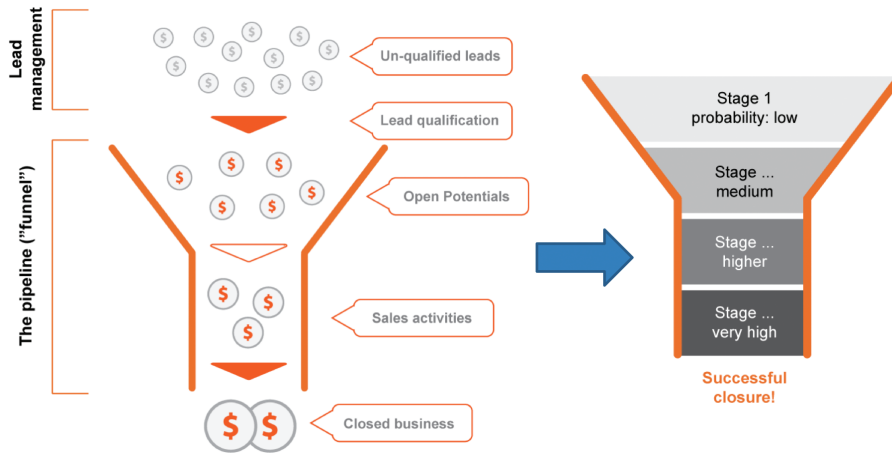


## sales pipeline

- pipeline: all open Potentials
- the "funnel": potentials at different stages
- used for performance evaluation / forecasting

# Working with POTENTIALS

## Pipeline and funnel



# Working with POTENTIALS

A “Stage” can be assigned to each Potential that will determine its place in the pipeline and any sales forecasts

\*Stage:  ▼

- Potential Created
- Initial engagement
- Needs Analysis
- Quoted
- Negotiations
- Committed
- Closed - Won
- Closed - Lost

Stage Name	Probability (%)	Sort Order	Forecast Type	Forecast Category
Potential Created	10	1	Open ▼	Pipeline ▼
Initial engagement	20	2	Open ▼	Pipeline ▼
Needs Analysis	30	3	Open ▼	Pipeline ▼
Quoted	50	4	Open ▼	Pipeline ▼
Negotiations	70	5	Open ▼	Best Case ▼
Committed	90	6	Open ▼	Commit ▼
Closed - Won	100	7	Closed Won ▼	Closed ▼
Closed - Lost	0	8	Closed Lost ▼	Omitted ▼

# Sales Pipeline

**Probability:** a likelihood (%) of successful closure

## Forecast Type

- **Open:** the Potential is Open and in the pipeline
- **Closed Won:** not in the pipeline, successfully closed
- **Closed Lost:** not in the pipeline, un successfully closed

## Forecast Category

- **Pipeline:** all open Potentials
- **Best Case:** have a high likelihood to close
- **Commit:** Potentials expected to close this quarter
- **Closed:** succesfully closed
- **Ommitted:** exclude from forecasts (typically lost)

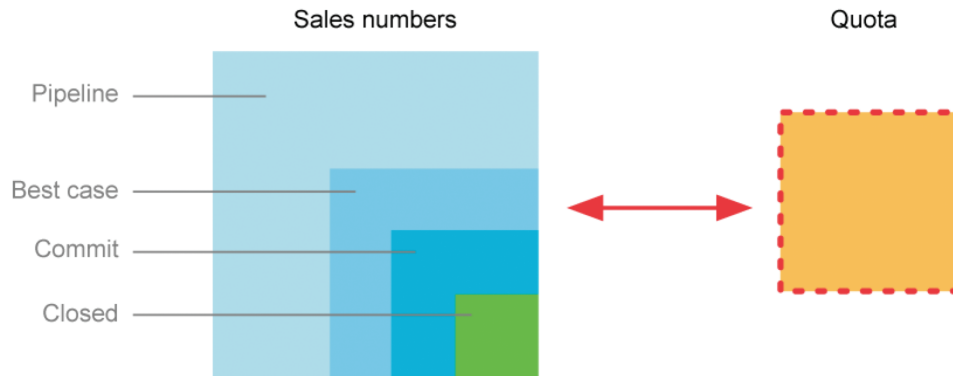
# Live demo



## Switch to Zoho CRM and demo:

- create/edit a Potential
- change the Stage and show its effect on the expected revenue

# Sales Forecasts



# Sales Forecasts

Sales forecasts in Zoho CRM are

- based on individual users
- for calendar quarters

Amount:  x Probability (%):  = Expected Revenue:

**Forecast Edit: Forecast Details for Q2-2013**

Forecast Details:

Month	Quota	Closed	Committed Amount	Best Case Amount	Pipeline
April	<input type="text" value="15000"/>	\$1,650.00	<input type="text" value="3500.00"/>	<input type="text" value="7800.00"/>	\$38,849.00
May	<input type="text" value="15000"/>	\$0.00	<input type="text" value="2400.00"/>	<input type="text" value="5300.00"/>	\$4,486.40
June	<input type="text" value="15000"/>	\$0.00	<input type="text" value="1500.00"/>	<input type="text" value="3900.00"/>	\$0.00
<b>Totals:</b>		<b>\$1,650.00</b>			<b>\$43,335.40</b>

# Live demo



Switch to Zoho CRM and demo:

- create a Forecast

# Working with ACTIVITIES



## Points to consider:

- track only what is relevant
- past: for log keeping
- future: for activity management
- now: do it!
- mostly around Contacts

# Additional modules



## E-mails

- inbound / outbound
- requires mail add-on
- fully automatic
- attaches to Contacts



## Calls

- log only (no recording!)
- planned (future)
- past (occurred)



## Events

- in calendar
- start & end time
- location
- attendees



## Attachments

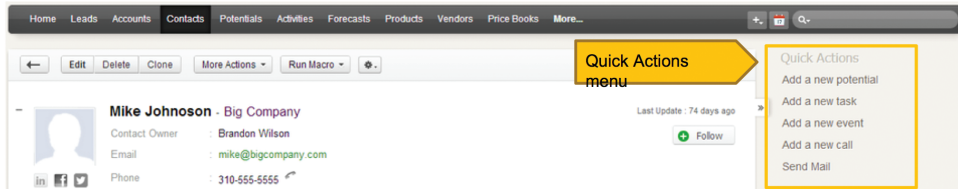
- static file storage
- source: upload / Zoho Docs / Google Drive



## Tasks

- single to-do item
- due date

# Working with ACTIVITIES



While there are many ways to create activities in Zoho CRM, the most convenient (and efficient) way to do so is from the Quick Actions menu in each module.

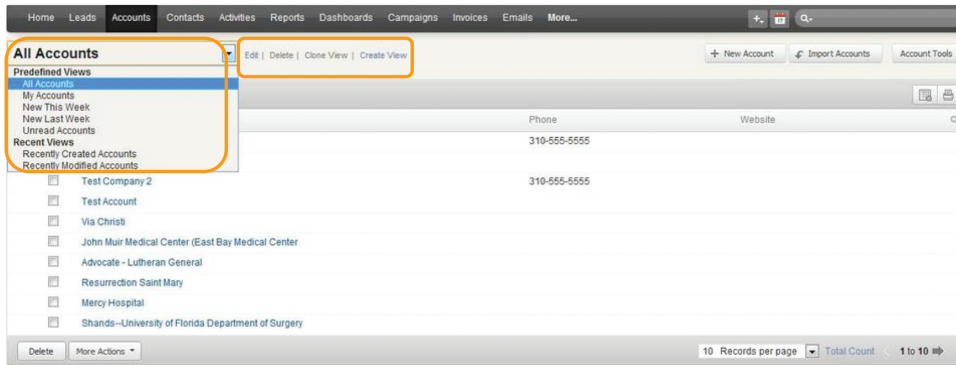
# Live demo



## Switch to Zoho CRM and demo:

- create a Task/Call/Event
- show them under Open/Closed activities (Related Info section)

# Views



## Points to consider:

- each module is a "view"
- single object
- standard and custom views
- can be assigned to a home screen panel

## Additional Info

More information on this subject on the Zoho website:

<http://www.zoho.com/crm/help/salesforce-automation.html>

<http://www.zoho.com/crm/help/opportunities/>

<http://www.zoho.com/crm/help/forecasts/create-forecasts.html>



# Managing Users & Sales Territories

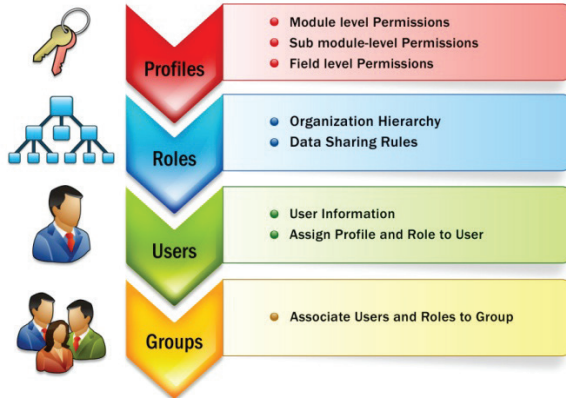
# Session Schedule

- Role-based Security
- Profiles
- Roles
- Users
- Groups

# Role-based Security

Managing the complexities of security administration is one of the growing concerns in any enterprise, especially those open to e-commerce and those with large networks. In such demanding times, the availability of Security Management is considered predominant – affecting all sectors of an enterprise.

Role-based access control is a method of managing authorization while performing tasks in complex systems – many users and many resources.



**Profiles** – A set of permissions and accessibility.







**Roles** – The hierarchical position within an organization.

**Users** – Persons accessing the system.

**Groups** – A set of Users.

# Profiles

Profiles are a set of permissions that define and control the access to CRM modules and functions. Profiles are created as independent entities and users associated to specific profile can access the functions that are assigned to them.

-  Create a Profile
-  Module-level Permissions
-  Other Permissions
-  Field-level Permissions
-  Assign Profile to User
-  Delete a Profile



# Create a Profile

By default, Zoho CRM provides the Administrator and Standard profiles. Creating a new profile necessarily requires that it is first duplicated with an existing profile (Clone Profile). Based on the access control provisions, the new profile can be edited later.

\*Profile Name : Sales

\*Clone Profile : Standard

Profile Description : For sales representatives in the organization

Save Cancel

**Hint:** Click on **Setup >> Users & Permissions >> Profiles >> New Profile >> Save**



A new profile needs to be cloned from the existing profile, a blank profile cannot be created. Only Users with **Manage Profiles** permission can create and define access rights to new profiles.

# Module-level Permissions

This controls the access to various modules for the different profiles and defines the permission for tab visibility; create, edit, delete and view records. For instance, a Sales representative's profile may have access to the Leads and Quotes modules but have no access to the Invoices module.

**Profile Details:**

Profile Name: Sales  
Profile Description: For sales representatives in the organization  
Created By: Tricia Mon, 11/07/2011 12:47:33 PM  
Modified By: Tricia Mon, 11/07/2011 12:47:33 PM

**Module-level Permissions:**

Entity	Tab Visible	View	Create	Edit	Delete
Home	<input checked="" type="checkbox"/>				
Leads	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Accounts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Potentials	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Campaigns	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Reports	<input checked="" type="checkbox"/>				
Dashboards	<input checked="" type="checkbox"/>				
Notes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Forecasts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

**Tab Visible** - Show or hide tab to users  
**Create** - Users can create records  
**View** - Users can view records  
**Edit** - Users can edit records  
**Delete** - Users can delete records

**Hint:** Click on **Setup** >> **Users & Permissions** >> **Profiles** >> **Edit** for the particular profile name >> select the check boxes for permission >> **Save**

# Sub Module-level Permissions

This controls the access to various actions within the modules. For instance, a profile may have permission to view and create leads at the module level but not have permissions to export leads.

- Documents
- Reports & Dashboards
- Import
- Export
- Tools
- Admin
- General

**Hint:** Click on **Setup >> Users & Permissions >> Profiles >> Edit** for the particular profile name >> select the check boxes for permission >> **Save**

# Field-level Permissions

This controls the visibility and edit permission for the fields in modules and sub-modules. For instance, a profile may be allowed only to view the revenue field, another profile may be allowed to view and edit the revenue field and yet another profile may not have any access to the revenue field.

Profiles: Standard Modules List: Leads

Lead Fields List: Save

Field Name	Visibility	Read Only
Lead Owner	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Company	<input checked="" type="checkbox"/>	<input type="checkbox"/>
First Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Last Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Title	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Email	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Phone	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Fax	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Mobile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Lead Source	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Lead Status	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Industry	<input checked="" type="checkbox"/>	<input type="checkbox"/>

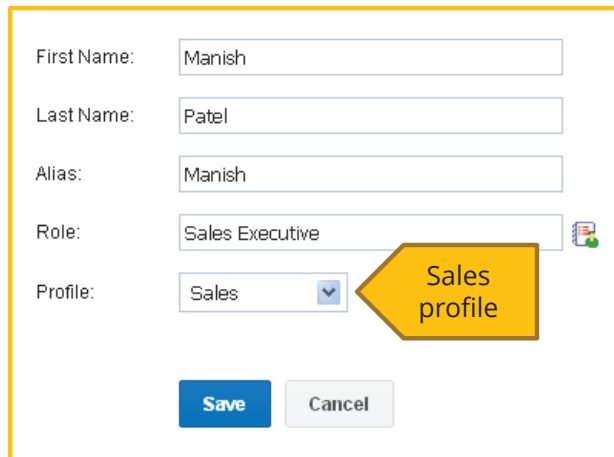
User can view and edit field

User can ONLY view the field

**Hint:** Click on **Setup >> Users & Permissions >> Fields & Links Permissions >> Select** Profile and Module from the drop down list >> **Edit >>** Select or clear the check boxes for the fields >> **Save**

# Assign Profile to User

Administrator can assign profile while adding a user in Zoho CRM. Association of profile allows the user to function as per their defined profile and have access to CRM modules and fields that are assigned to them.



The screenshot shows a user creation form with the following fields:

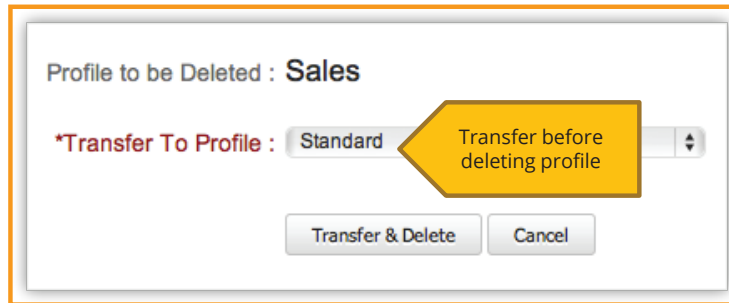
- First Name: Manish
- Last Name: Patel
- Alias: Manish
- Role: Sales Executive
- Profile: Sales (selected from a dropdown menu)

A yellow callout box with a black border points to the 'Sales' option in the Profile dropdown, containing the text 'Sales profile'. Below the form are two buttons: 'Save' (blue) and 'Cancel' (grey).

**Hint:** Click on **Setup >> Users & Permissions >> Users >> Edit** (for the particular user name) >> Select **Profile** (from the drop down list) >> **Save**

# Delete a Profile

This function helps in organizing and getting rid of unwanted profiles. Before deleting a profile, the users associated to that profile should be transferred to other existing profile.



**Hint:** Click on **Setup >> Users & Permissions >> Profiles >> Select Profile >> Delete >> Transfer & Delete**



The default Administrator and the Standard profiles cannot be deleted.

# Do It Yourself

## Exercise 1

As an Administrator of your company, create a sales profile allowing access to only the sales specific modules and functions, viz., visibility, view, create, edit, delete permissions.

**You are expected to provide Module-level permissions.**

## Exercise 2

To the sales profile you created above, define the fields that this profile needs to view and the fields that can be edited by this profile, even hiding certain fields, such as revenue or export.

**You are expected to provide Field-level security.**

## Exercise 3 (take an existing User or add a User first)

To the defined sales profile created above, add a User to start functioning. In other words, associate a sales profile to Sales Rep.

**You are expected to associate User with a profile.**






# What you can't do

While Zoho CRM allows maximum role-based security settings, there are certain settings out of the security management scope. These limitations are listed below:

- Field-level access permission is not enabled for Reports, Dashboards and Calendar modules.
- Import and Zoho Sheet View permissions automatically allow updating read-only fields in records.
- The Create, Update and Export permissions at the module-level get over-ruled by the Zoho Sheet View permission.
- Manage Reports & dashboards permission over-rides the Export data permission.

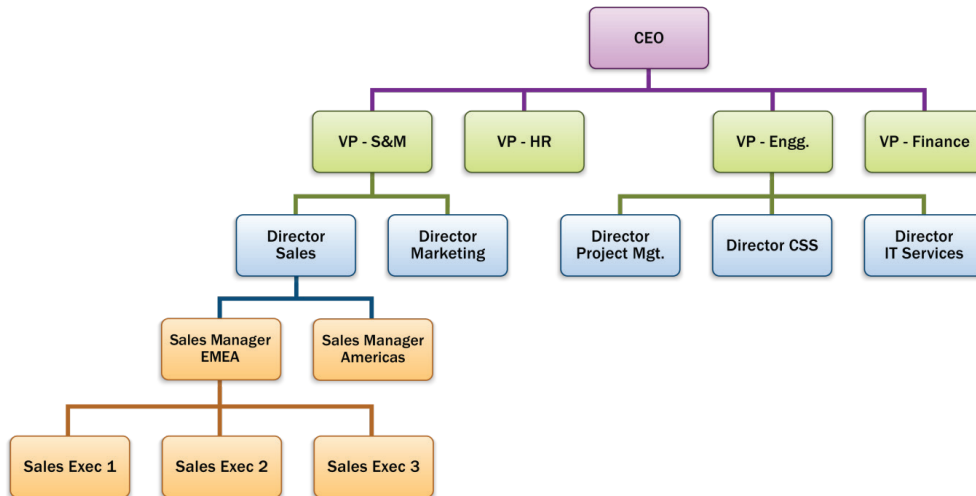
# Roles

Managing a profile is the immediate step after creating a new profile. This defines the module-level access and field-level security, deletes profiles and administers other profile related functions.

-  Overview
-  Create Roles
-  Assign a Role
-  Edit Role
-  Delete Role

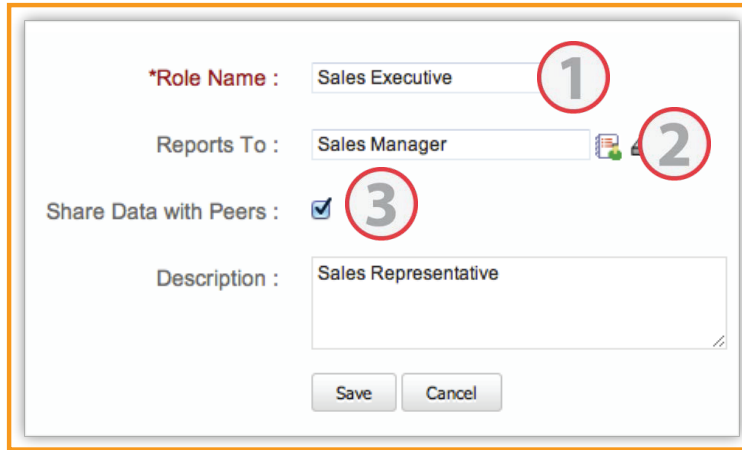
# Overview

Roles define the hierarchical position of users within an organization. In Zoho CRM, roles enable the users at the top hierarchical level to access all data and records of the sub-ordinates at the lower level in the hierarchy. For instance, the Sales Manager can access the records of the Sales executive but not vice-versa, unless they share the same profile.



# Create a Role

By default, Zoho CRM provides the CEO and Manager roles. However, based on the organization's hierarchy and the type of CRM edition opted by the organization, different roles can be created.



\*Role Name : Sales Executive 1

Reports To : Sales Manager 2

Share Data with Peers :  3

Description : Sales Representative

Save Cancel

**Hint:** Click on **Setup >> Users & Permissions >> Roles >> New Role >>** In the New Role page Type **Role Name >>** Select **Reports to >> Share data with peers**(if necessary) >> **Save**



The default CEO role can neither be edited nor deleted, it can only be renamed.

# Assign Role to User

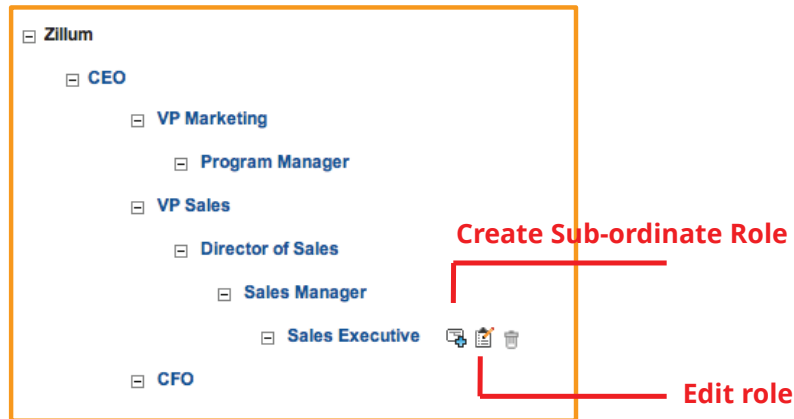
After role creation, the main task of the administrator is to assign these roles to users based on their position in the organization's hierarchy. For instance, Manish Patel (a User) is a Sales Executive, then he can be assigned the Sales Executive role.

The image shows a user management interface. On the left, a form for editing a user is displayed, enclosed in a yellow border. The form fields are: First Name: Manish, Last Name: Patel, Alias: Manish, Role: Sales Executive, and Profile: Sales. Below the form are 'Save' and 'Cancel' buttons. On the right, a 'Roles List' panel is visible, showing a tree structure of roles. The roles listed are: CEO, VP Marketing, Program Manager, VP Sales, Director of Sales, Sales Manager, Sales Executive, and CFO. A yellow callout box with a pointer highlights the 'Sales Exec. role' in the role list.

**Hint:** Click on **Setup >> Users & Permissions >> Users >> User name** (hyperlink) >> in user details page type **Edit >> Role** (from the Role tree) >> **Save**

# Edit Role

This option allows administrator to modify the users' role depending on the changes in the organizational hierarchy. This also involves renaming a role, changing the superior role or changing the setting for sharing roles.



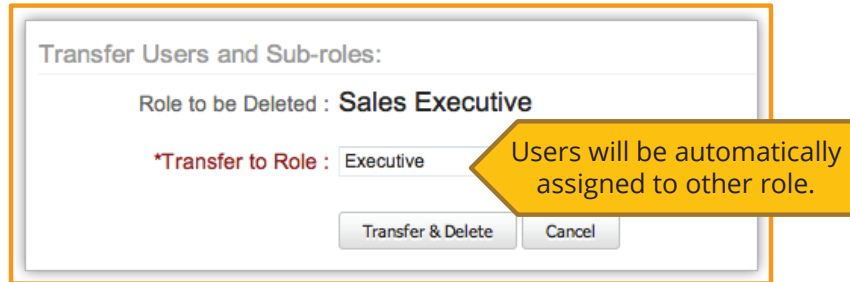
**Hint:** Click on **Setup** >> **Users & Permissions** >> **Roles** >> Role hyperlink >> **Edit** >> **Save**



Changes in Role name automatically updates the data sharing rules for the assigned user.

# Delete Role

Deleting removes unwanted roles depending on changes in the organization's hierarchy. Deleting an existing Role necessarily requires transferring associated users to other existing Roles.



Transfer Users and Sub-roles:

Role to be Deleted : **Sales Executive**

\*Transfer to Role :

Users will be automatically assigned to other role.

**Hint:** Click on **Setup >> Users & Permissions >> Roles >> Role name** hyperlink >> **Delete**  
>>In the Delete Role page, transfer the role and child-roles to a new role from the Role tree  
>> **Transfer & Delete**

**Note:**

- Deleting a Role transfers associated Users of the role to another existing Role
- The defined permissions of the deleted Role does not get attributed to the “transferred to” Role
- All the Subordinate roles of the deleted Role get appended to the “transferred to” Role

# Do It Yourself

## Exercise 1

Under the default Zoho CRM Role (CEO), define two Subordinate Roles. Furthermore, define two Subordinate Roles for each of the newly defined Roles under the CEO. The subordinate Roles should be able to share data among themselves.

**You are expected to create Roles and Subordinate Roles with ‘Share data with Peers’ option.**

## Exercise 2

After creating Roles, associate them to Users as per the organizational hierarchy.

**You are expected to assign Roles to Users.**

## Exercise 3

Imagine a situation in your company where there has been a departmental revamping, like users with certain roles have been moved to some other roles while others have been taken off. As an administrator how will you handle this situation?

**You are expected to create new users; assign them roles; edit few roles; transfer and delete the unwanted roles.**

# Manage Users

User is any person accessing Zoho CRM account. In other words, a User manages and shares organization's records through the Zoho CRM account. For instance, Peter and Patricia are working in an organization but only Peter has a Zoho CRM account, which means only Peter is a User and not Patricia because she does not have a valid CRM account. However, if in future Patricia is assigned an account, then she too becomes a User.

- Types of users
- Add users
- Activate or Deactivate Users
- Delete Group

# Types of Users



**Standard User** – This defines a regular user with a CRM account performing the basic user-level functions as per the defined Role, viz., Sales Representative, Support Agent and so on.



**Power User** – This defines a user performing the basic user-level functions as well as few administrative functions viz., customizing interface, adding users, managing workflow rules, etc. Example, Sales manager, etc.



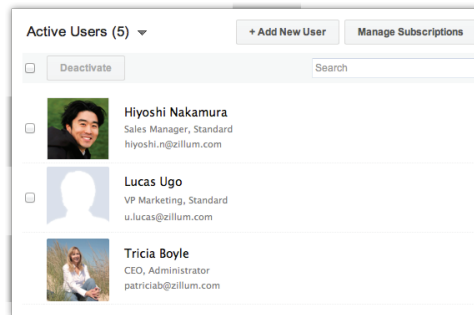
**Admin User** – This defines a user performing administrative functions and having access to the whole CRM system. The Zoho CRM system demands at least one Admin User who can define and configure the CRM system to meet company requirements. This user is normally a top-level official in the organization.



By default, the Admin User is the Power User with all the access and functional rights. However, the Power User can be created different from the Admin User. For instance, Team-Leaders can be made as Power Users with some admin functions.

# Add Users

Adding User is one of the primary functions and requirement in Zoho CRM. User who signs up for Zoho CRM is recognized as the Admin User and is responsible for adding new users.



**Hint:** Click on **Setup >> Users & Permissions >> Users >> Add New User >>** In the Add User page fill the mandatory fields >> **Save**

Note: User once added cannot be deleted as this results in deleting all the data and records associated with the particular user.

# Activate/Deactivate User

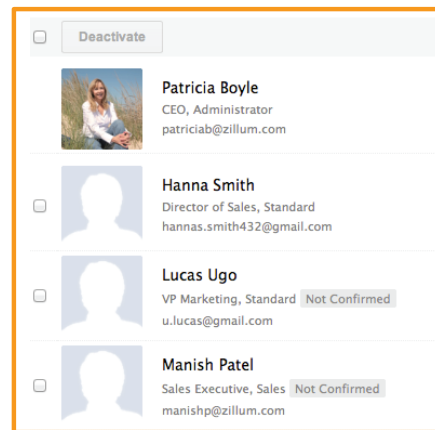
Depending on an organization's requirement, users can be activated or deactivated whenever required. This also helps when a particular user moves to a different business unit or has climbed the hierarchical status within the organization. For instance, Hanna Smith is one of the sales manager in her organization.

**Scenario 1:** Hanna left the organization so her User account is deactivated.

**Scenario 2:** Hanna is Associate Manager-In-charge (make-shift arrangement). Later Lucas was hired as a Sales Manager for this department. Once Lucas took the charge, Hanna handed over customers to John so her account is deactivated.

**Scenario 3:** Hanna is back as the Sales manager so her account is Activated.

**Hint:** Click on **Setup >> Users & Permissions >> Users >> Edit >>** Select / Clear **Active** check box to activate / deactivate



**Note:** Only Active users are counted for user license.  
Deactivated Users cannot access the Zoho CRM

# Do It Yourself

## Exercise 1

As an Admin User with complete access to Zoho CRM system, add users with base-level functional privilege and users with base-level as well as some admin level functional privilege.

**You are expected to create Standard and Power Users.**






## Exercise 2

Given a situation that after subscribing to free edition of Zoho CRM you decide to move to the professional edition. However, you wish to delete two of the current users along with their email addresses and you need to ensure that the data, forms and roles are intact.

**You are expected to deactivate users and replace them with new users.**

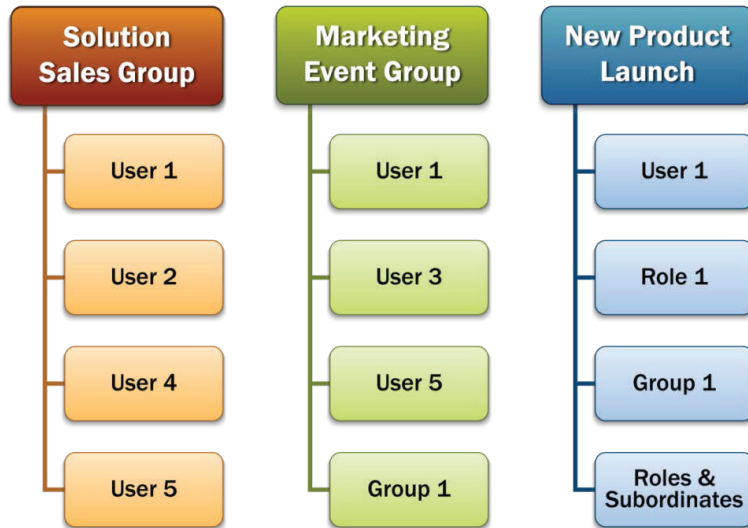
# Groups

Managing a profile is the immediate step after creating a new profile. This defines the module-level access and field-level security, deletes profiles and administers other profile related functions.

-  Create Groups
-  Assign Users to Group
-  Edit Group
-  Share Records with Group
-  Delete Group

# Overview

Group defines a set of users performing a common set of tasks. Users within the group can access and share records and perform the necessary functions within the group. For instance, in an organization there can be a sales group consisting of the Sales Executive, Sales manager, Tele-Caller, etc. all updating and accessing the sales record and database.



# Create Groups

Zoho CRM allows creating different types of user groups and sharing some of the common records within the groups. In other words, groups enable data-level access to other users with similar job profile. However, records cannot be assigned directly to the groups.

\*Group Name : Sales

Group Description : The US sales group

Group Sources:

Select Group Source Type: Roles and Subordinates

Available:

- CEO
- Executive
- Vice President
- Director of Sales
- Sales Executive

Selected:

- R: Vice President
- R: Director of Sales
- RS: Sales Manager
- U: Marty Sinclair

Save Cancel

**Hint:** Click on **Setup >> Users & Permissions >> Groups >> Create New Group >> Save**

# Assign Users to Group

Members within the group can be Users, Roles, Roles & Subordinates or different groups.

**Sales Group Group Details:**

Group Name : Sales Group  
Group Description : The US sales group

**Associated Users:**  
Hiyoshi

**Associated Roles:**  
Director of Sales

**Associated Roles and Subordinates:**  
Sales Manager

**Associated Groups:**  
Accounting

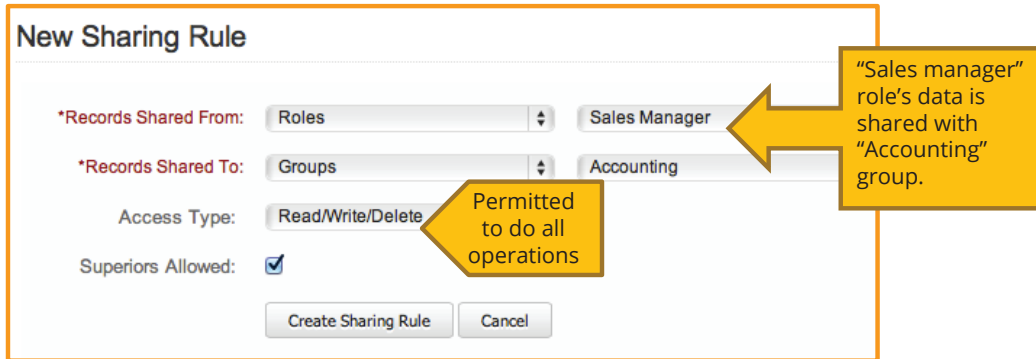
**Group Users:**  
Patricia Boyle  
Hiyoshi  
Hanna Smith  
Manish Patel

Red arrows point from the 'Group Users' list to the 'Associated Users', 'Associated Roles', and 'Associated Groups' sections of the 'Sales Group Group Details' form.

**Hint:** Click on **Setup >> Users & Permissions >> Groups >>** In the Group Source, **select** Users / Roles / Roles & Subordinates / Groups >> **Save**

# Share Records with a Group

Once a group is created, there arises the need to share records (data) within the group. Sharing data with groups is made possible by the data sharing rules which provides access to users belonging to other roles and groups.



The screenshot shows the 'New Sharing Rule' dialog box with the following fields and annotations:

- \*Records Shared From:** Roles (dropdown) | Sales Manager (text field). An arrow points from the 'Sales Manager' text to a yellow callout box.
- \*Records Shared To:** Groups (dropdown) | Accounting (text field).
- Access Type:** Read/Write/Delete (dropdown). A yellow callout box points to this field with the text 'Permitted to do all operations'.
- Superiors Allowed:**
- Buttons: Create Sharing Rule, Cancel

Yellow callout boxes provide additional context:

- One points to 'Sales Manager' with the text: "Sales manager" role's data is shared with "Accounting" group.
- Another points to 'Read/Write/Delete' with the text: Permitted to do all operations.

**Hint:** Click on **Setup >> Users & Permissions >> Data Sharing Settings >> Edit Permission >> Save Permissions**

# Do It Yourself

## Exercise 1

In a hospital setup, define teams. The teams should be Surgeons, Doctors, Nurses, Interns and Medical Students. Surgeons share records with doctors but not with interns and Medical students. Doctors share records with Nurses, Interns and Medical students.

**You are expected to create groups and share record with groups**

## Exercise 2

In this scenario, you need to form a team from the above groups as the regulatory group consisting of a surgeon, a doctor, a nurse, an intern and a medical student. Individuals (from this team) already have shared records with their respective groups. But in this situation the individuals of this Regulatory team should have records shared by other groups as well. However, the Regulatory group does not share records with any other group except to individuals within the group.

**You are expected to create another group with more specific data sharing settings.**

# Things to Remember

- The foundation of any security management is a role-based access system, that controls the permissions and authentication of CRM users.
- Profile is a set of permissions that defines and controls the accessibility to CRM modules and functions.
- Module-level permission controls the access rights to various modules for the different profiles.
- Sub module-level permission controls the access rights to various actions within the different modules.
- Field-level permission controls the visibility and edit permission for the fields in the different modules.
- Creating a new profile necessarily requires that it is first associated with an existing profile (Clone Profile).

- Except the default Administrator and the Standard profiles, all other profiles can be deleted.
- A Role defines the hierarchical position within an organization.
- Deleting a Role transfers associated Users of the role to another existing Role.
- A User is any person accessing Zoho CRM account.
- Deactivated Users cannot access Zoho CRM.
- Users once created cannot be deleted by Zoho CRM Administrator.
- A Group defines a set of users performing a common set of tasks.

# Test Yourself

1. Profile means (a) A Role (b) A set of permission (c) A hierarchy (d) A Company. Which of the following is true:
  - Only (b)
  - (a) & (c)
  - Either (c) or (d)
  - (b) or (c) or (d)
  - None of the above
2. Security Management is better understood as:
  - Managing Security
  - Evaluating Management
  - Role-based Access Control
  - A Management process
  - Securing Management Process
3. In Zoho CRM, Roles define:
  - Module-level permission
  - User Information
  - Organizational Hierarchy
  - Data sharing rules
  - All the above

4. Permissions defined at the Module, Sub-Module and Field levels are found in:

- Groups
- Users
- Accounts
- Profiles
- Roles

5. Which of the following is true for Deactivated Users?

- They can access Zoho CRM
- They cannot access Zoho CRM
- They are deleted from Zoho CRM
- They still have access to some base functions
- They become part of the active users

6. Reports and dashboard permission will usually bypass:

- Administrator permission
- Export data permission
- All security level permission
- Module-level permission
- None of the above

7. A Power User is generally :

- A deactivated user
- A restricted user
- User with complete access to Zoho CRM
- A User with some administrative rights
- A permanent user

8. If a Zoho CRM user leaves the organization, the best thing to do is:

8. Allow the user to still use the account
- Deactivate and replace the user
  - Tighten the access control for the user
  - Do nothing

# Automating Sales Activities with Workflow Rules

# Session Schedule

- Workflow basics
- Workflow rules
- Workflow assignments
- Sample process, macros

Workflow automation is a very important subject because they have a direct impact on productivity. However, it is not an easy subject and requires careful planning. This session covers the basics, there are different areas in Zoho where automation can happen.

# About Automation

**Process (workflow):** a sequence of activities and events

**Break down into steps:** control and improve

**To automate:** understand it and make it communicable (visualize / annotate / otherwise capture)

**Automation:** requires to define a process at the basic task level

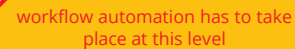
For automation to take place the workflow whose steps we want to automate has to be understood at great detail. We have to clarify the process we want to automate, then break it down into steps that that can be controlled individually.

Oftentimes when we do this we realize that the steps need clarification/improvement before they can be automated. In most cases some sort of visual annotation method is used to map our the process (you may start as simple as a whiteboard, boxes and arrows). Automation takes place at the basic task level!

# Workflow Basics

## Layers of workflow

- Business Unit - has a broad goal (e.g. wholesale)
- Department - fulfills a company function (e.g. sales)
- Person Role - has a specific role inside the organization (e.g. sales executive)
- Activity - a sequence of tasks
- Task - an individual step in an activity



workflow automation has to take place at this level

## For automation also consider

- order of tasks (sequence)
- collaboration of participants (interactions)
- sequence of interactions (choreography)

For a workflow to make sense it has to be observed in its context, starting as high in the hierarchy as the general goal of the business unit we are in. Then there is a distinct function (e.g. sales), the role of the person who uses the workflow, then the activity (which is a chain of tasks) and then the individual tasks.

For automation to work you also have to understand the sequence of the tasks, what happened when multiple people get involved in performing an activity and if they have to interact for the activity to happen.

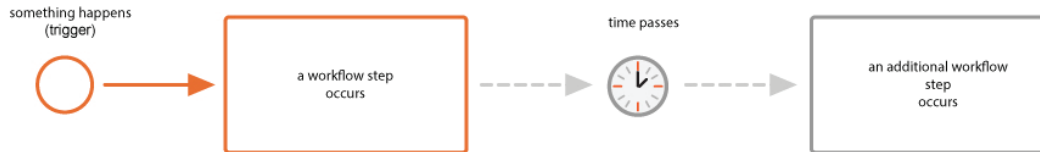
# Zoho CRM Workflow

## Workflow automation in Zoho CRM is

- Triggered when a new object is created or an existing one is changed
- The triggered event can be
  - Field update
  - An e-mail (internal / external)
  - A task
  - Object assigned to a user
  - A timed event
  - A Webhook

Zoho has Workflow Rules which are triggered by certain events in the system. WHAT can happen when an event is triggered is listed here: a data field can be changed, an email can be sent to a user or to an external address, a task can be created and assigned to a user, other objects (e.g. a Case) can be assigned to a user, a timer can be set for an event to happen later or a webhook (a uniquely formatted URL with variables) can be launched. Webhooks can trigger external websites to do specific things.

# Building Blocks



## Trigger (WHEN)

- create: a new object is created
- change: an existing object is edited, updated or deleted
- time based: when certain amount of time passes

## Workflow action (WHAT)

- rules: defines what happens
- alerts: sends a notification
- tasks: assigns a to do item
- field updates: changes data
- webhooks: sends a trigger to a 3<sup>rd</sup> party system

To use a simple visual annotation method a circle = event, box = task. These are the basic building blocks of our workflow. The trigger determines WHEN an event happens the Workflow item sets WHAT happens.

# Rules

1

Assign to a specific **module**

2

Define trigger **event**

- Create (new)
- Edit (existing) - any field is changed
- Create or Edit - new or existing
- Field update - specific field is changed (new value)
- Delete - data is removed

3

Set **Criteria**

- based on standard string / numerical operators

# Rules

4

Define **Action** (instant)

- send alert
- assign task
- update field
- call webhook
- follow



5

**Time** based actions (delayed)

- alerts
- tasks
- field updates

Workflow rules have the same structure across the system: 1) They are assigned to a module 2) Define WHEN the rule should be executed 3) Set the criteria to limit triggering to records that meet them 4) Define WHAT happens when the rules is executed 5) Specify if an additional, delayed, rule is to be executed

# Actions

## Alert

- sends an e-mail
- requires an e-mail template
- to internal users or groups
- to external addresses

## Task

- assigns to CRM user
- due date can be set dynamically
- task owner can be notified right away
- reminder can be set for future date

These slides describe in detail the nature of the workflow actions that can take place.

# Actions

## Field update

- sets a new value for a specific field in a record in a module

## Webhook

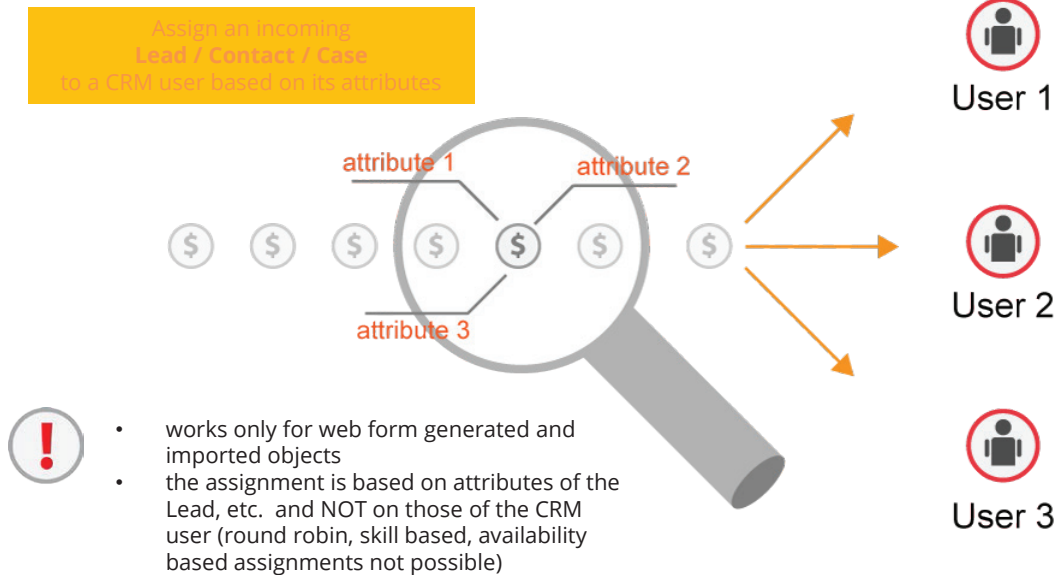
- fully custom URL
- POST / GET methods
- append entity parameters (standard / XML format)
- append custom parameters

## Follow

- sets status for the Pulse module
- change to: follow/unfollow
- record owner / creator
- owner's superior
- arbitrary user, role or group

For webhooks to work the receiving system must be able to process them. "Follow" turns of Pulse for the specific record.

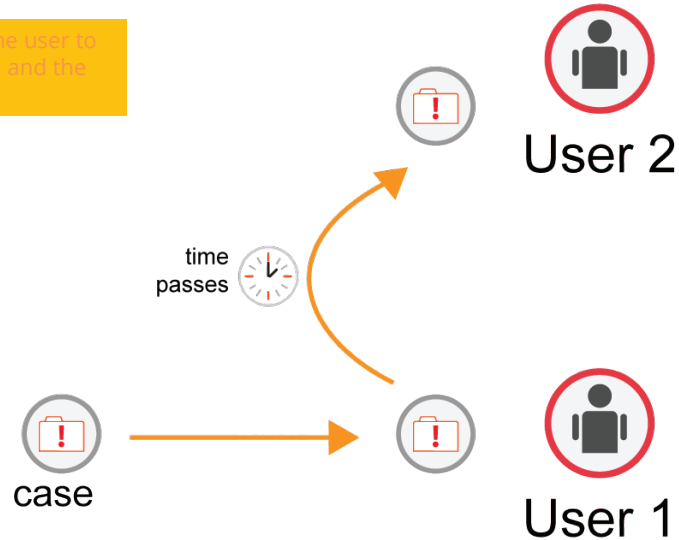
# Assignment Rules



Assignment rules work for Leads, Contacts and Cases received thru web forms and assign the record to a specific user based on attributes of the record. The user they are assigned to has to be set firmly, dynamic assignment based on an attribute of the user is not possible.

# Case Escalation Rules

Get a Case moved from one user to another based on criteria and the passage of time



Case escalation rules assign a Case to another user if it has been inactive for a certain period of time. It reduces the number of overlooked Cases.

# Setting it up

The screenshot shows a CRM setup interface. On the left is a navigation sidebar with 'Automation' highlighted. The main content area has tabs for 'Workflow', 'Assignment Rules', and 'Case Escalation Rules'. The 'Workflow' tab is active, showing a sub-tab bar with 'Rules', 'Alerts', 'Tasks', 'Field Updates', 'Webhooks', and 'Follow-ups'. The 'Rules' sub-tab is selected, displaying the 'Workflow Rules' section. Annotations include three boxes at the top: 'workfl ow' pointing to the 'Workflow' tab, 'assign leads / contact s' pointing to the 'Assignment Rules' tab, and 'case escalati ons' pointing to the 'Case Escalation Rules' tab. A yellow arrow points to the 'Automation' menu item, and another points to the 'Rules' sub-tab.

**workfl ow**

**assign leads / contact s**

**case escalati ons**

Setup

Workflow Assignment Rules Case Escalation Rules

Personal Settings

Users & Permissions

Organization Settings

Customization

Automation

Templates

Website Integration

Apps & Add-ons

Developer Space

Data Administration

Subscription Manager

Rules Alerts Tasks Field Updates Webhooks Follow-ups

Workflow Rules Help

Workflow rules automate your business processes. They are a set of rules that are executed when certain specified conditions are met. These rules can include email alerts, tasks, field updates, webhooks and followups that can be set as an instant action or time based actions.

Create Rule

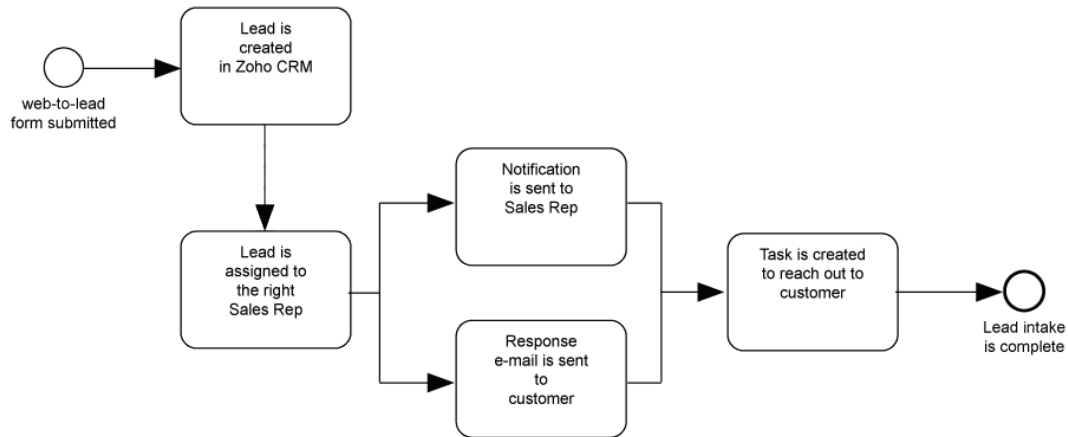
List of Rules: All Modules Status: All Reorder Rules

Rule Name	Module	Execute On	Timed Actions	Alerts	Tasks	Field Updates	Webhooks	Follow-ups	Active
<Create Rule>									

These slides walk the user thru the actual steps of setting up a workflow.

# Sample Process

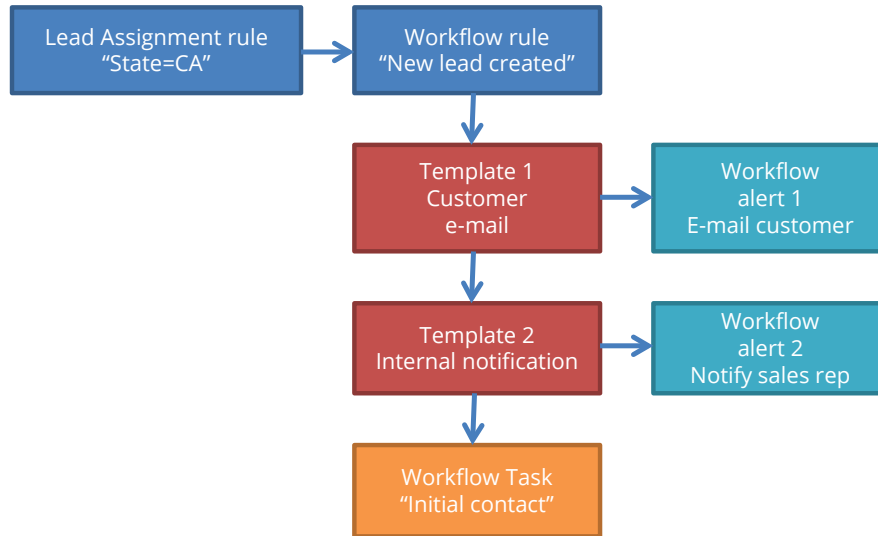
## Workflow - Lead Intake



This is what the sample process looks like on a workflow diagram.

# Sample Process

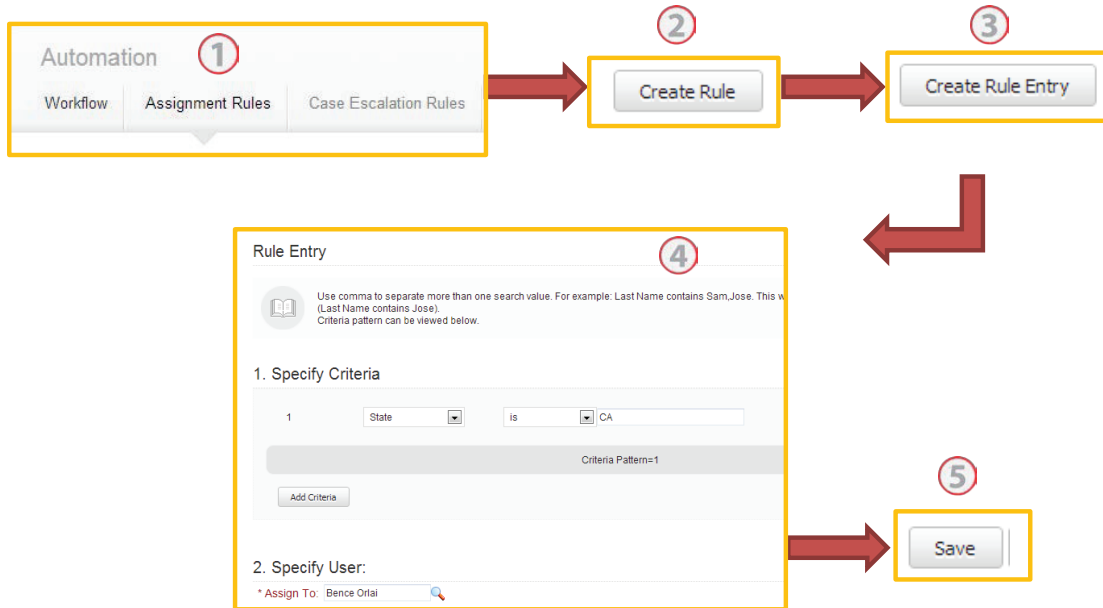
Building blocks



These are the actual workflow steps that have to be created for the whole process to happen.

# Sample Process

Making it happen...



Follow the numbered steps to set it up.

# Sample Process

1

Templates

Email Templates Inventory Templates Mail Merge Templates

Email Templates Help

Below 2 of Email templates in various folders. You can use these templates for personalized mass mailing and Work flow alerts.

New Template New Template Folder

New Email Template Help

Record Type: Leads

\*Template Name: Thank you

\*Store Under: MyDoc Email Templates

\*From: Current User's Email

\*Subject: Thank you for your interest

Reply To:

Add User Signature

Attach Files: Choose File(s) No file chosen Del

Type your message below. You can insert Zoho CRM fields to customize the message content.

Available Merge Fields: Select Field: Click Merge Field value:

User: Last Name: \$Last.LastName

Copy and paste the merge field value into your template below.

Dear \${Leads.First Name}!

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Sed quis justo in felis mollis consectetur. Nunc faucibus eros ut massa varius lacina. Aenean adipiscing mollis sem. Aliquam quis inquam ac lorem iaculis feugiat. Praesent iaculis eros et ardu varius quis auctor tortor mollis.

KIND regards,

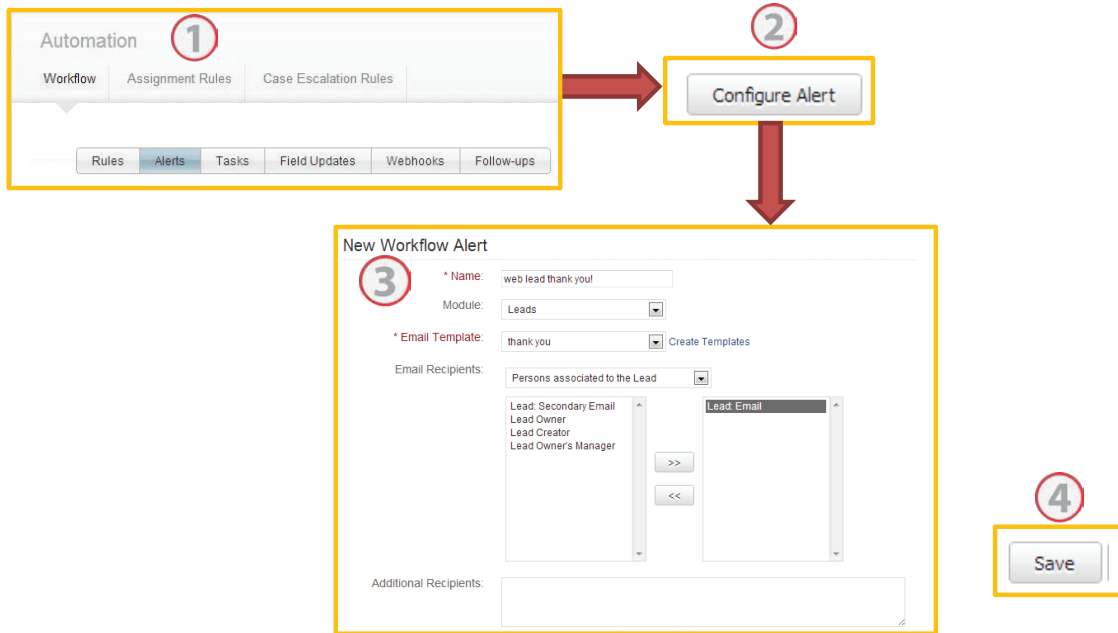
\$(User.First Name) \$(User.Last Name)

4

Save

Follow the numbered steps to set it up.

# Sample Process



Follow the numbered steps to set it up.

# Sample Process



Follow the numbered steps to set it up.

# Sample Process

↓

6

## 4. Actions

Instant and time based actions can be set as per your business needs. To know more document.

Instant Actions

Send Alerts (0)

Associate Existing Alerts

Name
<input checked="" type="checkbox"/> web lead thank you!

Associate



7

Assign Tasks (0)

Module: Leads

\* Subject: initial contact

\* Due Date: WFRule Trigger Date plus days

\* Status: Planned

\* Priority: Normal

Assigned To:

Notify Assignee:  Notification email will be sent only to the Active and Confirmed user.

Remind Assignee:



8

Save & Associate

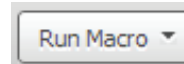
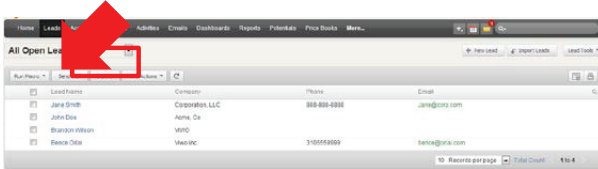
Follow the numbered steps to set it up.

# Availability

	Enterprise Edition	Professional Edition	Free Edition
<b>Workflow Management</b>	✓	✓	-
Workflow Rules	30/module	10/module	-
Workflow Alerts	✓	✓	-
Workflow Tasks	✓	✓	-
Workflow Field Updates	✓	-	-
Webhooks	✓	-	-
Pulse Follow-ups	✓	-	-
Case Escalation Rules	✓	-	-

Workflow automation is not available in the Free version and has limited availability in the Professional Edition.

# Macros



A macro can:



change/update a field in the record it is applied to



send a template based e-mail to the e-mail address in the record

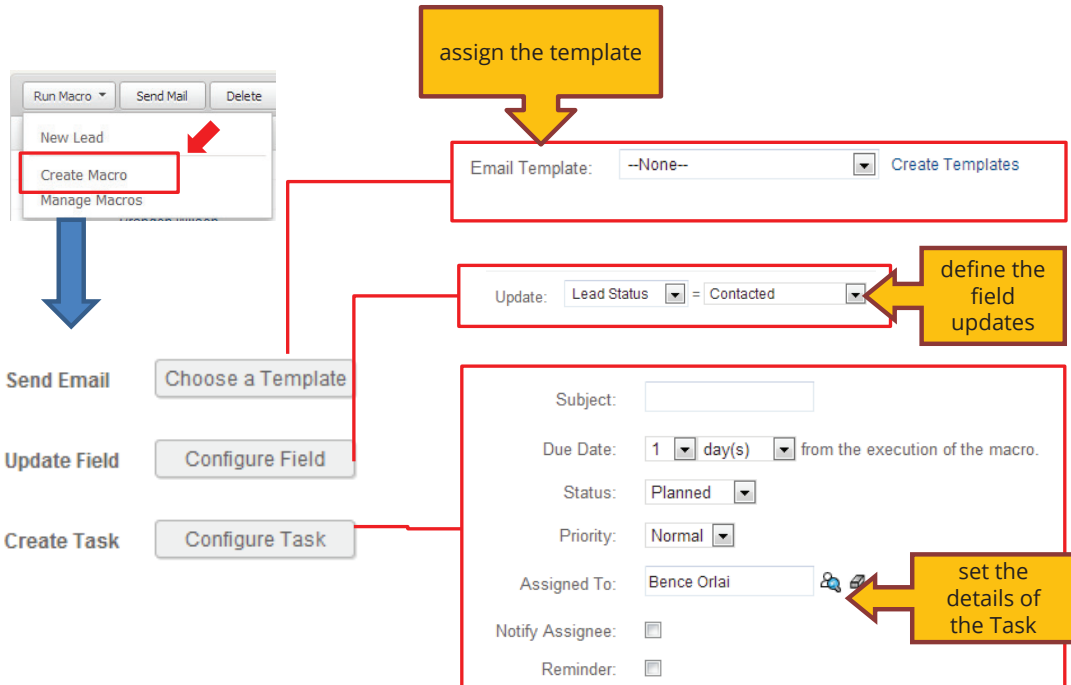


create a new Task and assign it to the record

Macros can be used for automation of day to day clusters of tasks at the user level. The user has to set it up by themselves, they can not be configured system wide.

# Macros

To set up a macro in a module:



# Macros



- Macros are available in the main modules (Leads, Contacts, Accounts, Potentials) only
- Macros can be executed on multiple records at the same time (mass update)
- macros are unique to each user, can not be specified at the organization level
- 1 email, 3 Field updates and 3 Tasks can be configured for each macro

Macros are very easy to set up and can save a lot of time for the user.

# Additional Info

More information on this subject on the Zoho website:

<http://www.zoho.com/crm/help/automation/workflow-rules.html>

<http://www.zoho.com/crm/help/automation/manage-workflow.html>

<http://www.zoho.com/crm/help/automation/assignment-rules.html>

<http://www.zoho.com/crm/help/miscellaneous/macros.html>



# Reporting in Zoho CRM

---

## Session schedule



Data quality and reporting



Using reports in Zoho CRM



Dashboards



Beyond the reporting module

# A word on data quality...

Quality data IN



Quality data OUT



Good reporting



## Good data takes

- Good interface design
- Establish guidelines for data entry
- Clean data before import
- Store only relevant info Think "team"



# Reports

Multi- object



Information is pulled from multiple modules

# Reports

## Simple calculations



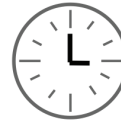
## Sort



## Group



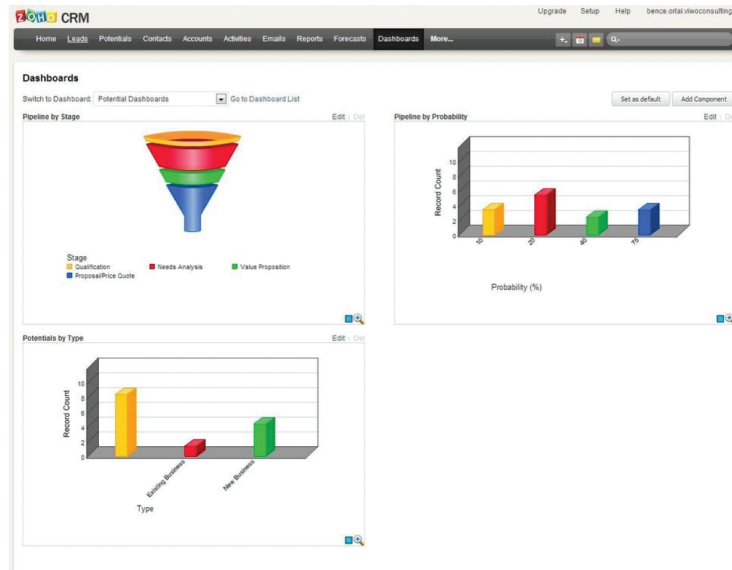
## Schedule



(e-mail / xls)

# Reports

Add them to dashboards



- based on a report
- visual representation of the data
- live
- allows "drill down"

# Live demo



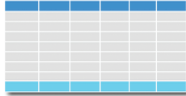
## Switch to Zoho CRM and demo:

- overview of the Reports module
- overview of the Dashboard module

# Reports

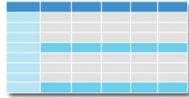
## Report types

**Tabular Report**



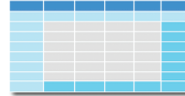
Tabular reports provide you the way to list your data in a simpler form.

**Summary Report**



Summary reports allow you to view your data along with subtotals, groupings and other summary information.

**Matrix Report**



Matrix reports allow you to view data summarized in a grid against both horizontal and vertical columns.

# What is reporting?

## Reporting = using data for decisions

- simple data export to use in Excel
- use metrics (KPI's) to keep processes in check
- visualize data
- understand trends, patterns

## Good reporting

- needs good data (!)
- requires planning (what to look for?)
- detailed drill-down = Business Intelligence (BI)
- requires complex methods

# Reports

The screenshot shows the Zoho Reports interface. At the top, a navigation bar includes tabs for Home, Leads, Pulse, Contacts, Projects, Accounts, Reports (highlighted with a red circle), Dashboards, Products, Activities, and More... Below the navigation bar, the 'Create new report' section features three buttons: 'Create Report' (highlighted with an orange box), 'Create Report Folder', and 'Report Scheduler'. A link for 'Configure Zoho Reports' is also present. The main content area is divided into two sections: 'Recently Accessed Reports' and 'Built in (existing) reports'. The 'Recently Accessed Reports' section contains a table with columns for Report Name, Report Folder Name, and Description. The 'Built in (existing) reports' section is a list of report categories, each with an expandable icon and 'Edit' and 'Del' options. A red circle highlights the expandable icon for 'Account and Contact Reports', with a red arrow pointing to a plus sign icon on the left side of the interface.

Home Leads Pulse Contacts Projects Accounts **Reports** Dashboards Products Activities More...

**Create new report**

Reports    [Configure Zoho Reports](#) <sup>New!</sup>

Recently Accessed Reports		
Report Name	Report Folder Name	Description
Pipeline by Probability	Projects Reports	Projects by their probability.
Converted Leads	Lead Reports	Leads that are converted into Account / Projects / Contact.

**Built in (existing) reports**

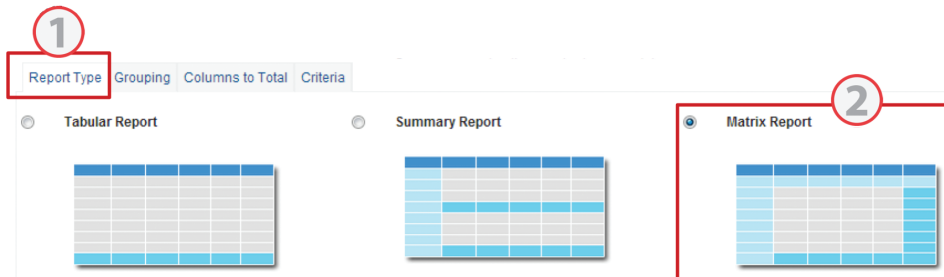
- Account and Contact Reports Edit Del
- Projects Reports Edit Del
- Lead Reports Edit Del
- Activity Reports Edit Del
- Campaign Reports Edit Del
- Case and Solution Reports Edit Del
- Forecast Reports Edit Del
- Product Reports Edit Del
- Vendor Reports Edit Del
- Quote Reports Edit Del
- Sales Order Reports Edit Del
- Purchase Order Reports Edit Del
- Invoice Reports Edit Del

# Reports

## Building a report

**Business need:** what business deals are outstanding for each Account, in what stage and what is their total value?

**Report definition:** show each Account's Potentials grouped by Stage and summarized by total value where the Stage is not 'Closed'.



# Reports

## Building a report

Report Type **Grouping** Columns to Total Criteria

**3** 1. Specify your Row Headings:  
Subtotal By: Account Name  Sort Order: Ascending

**4** 2. Specify your Column Headings:  
Subtotal By: Stage  Sort Order: Ascending

The diagram illustrates the configuration of a report. Step 3, 'Specify your Row Headings', is highlighted with an orange box and a red circle containing the number 3. It shows 'Subtotal By' set to 'Account Name' and 'Sort Order' set to 'Ascending'. Step 4, 'Specify your Column Headings', is highlighted with a blue box and a red circle containing the number 4. It shows 'Subtotal By' set to 'Stage' and 'Sort Order' set to 'Ascending'. An orange arrow points from step 3 to a table structure, and a blue arrow points from step 4 to the same table structure. The table structure consists of a 4x4 grid. The top row has four blue header cells. The first column has four orange cells, representing subtotals. The remaining cells are grey.

# Reports

## Building a report

5

Report Type	Grouping	Columns to Total	Criteria
Columns	Sum		
Potential - Amount	<input checked="" type="radio"/>		
Potential - Probability (%)	<input type="radio"/>		
Potential - Expected Revenue	<input type="radio"/>		
Record Count	<input type="radio"/>		

	■	■	■	■
■				
■				
■				
■				



# Reports

## Building a report

Report Type   Grouping   Columns to Total   **Criteria**

**Standard Filters:**

Column: Account Created Time   Custom   Start Date:   End Date:

**Advanced Filters:**

**6** 1   Stage   doesn't contain   Closed

Add Criteria   Criteria Pattern = 1

# Reports

## Building a report

7

Filter Options:

Column: Account Created Time Start Date: End Date:

Account Created Time Custom Apply Filter

Export Save As Customize Reload Delete Report

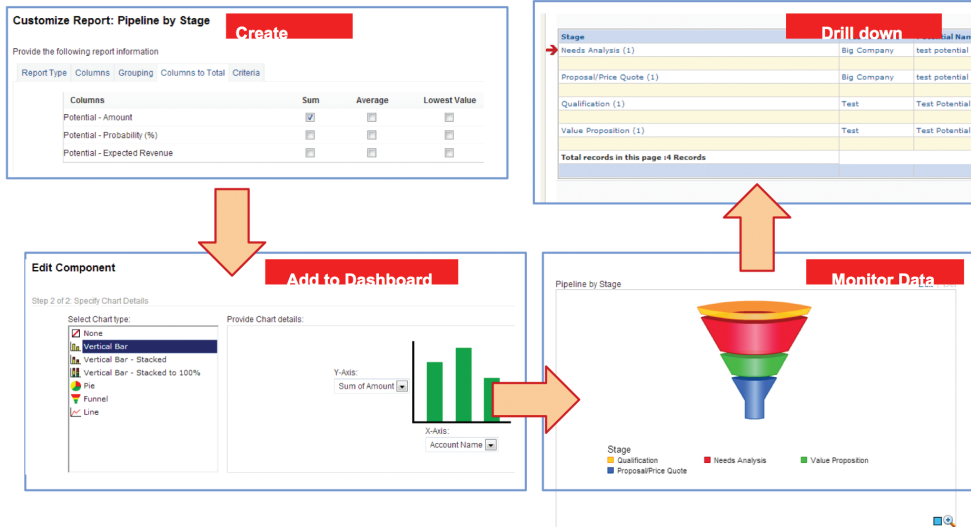
8

Displaying 1 to 3

Sum of Amount	Stage					Grand Totals
Account Name	---	Needs Analysis	Proposal/Price Quote	Qualification	Value Proposition	
Big Company	-	500.0	600.0	-	-	1100.0
Parent Account	0.0	-	-	-	-	0.0
Test	-	-	-	100.0	300.0	400.0
<b>Grand Totals</b>	<b>0.0</b>	<b>500.0</b>	<b>600.0</b>	<b>100.0</b>	<b>300.0</b>	<b>1500.0</b>

Displaying 1 to 3

# Dashboards



# Live demo



## Switch to Zoho CRM and demo:

- overview of the Reports module
- overview of a Dashboard and drill down (click on a dash)

# Limitations

## Limitations of Zoho CRM's report functionality

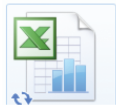
- no functions like in Excel (stats, math, text etc.)
- no print formatting
- not efficient for huge amounts of data

# Beyond reports

Additional options to use data



sign up for  
Advanced Analytics  
(Zoho Reports)



export to Excel

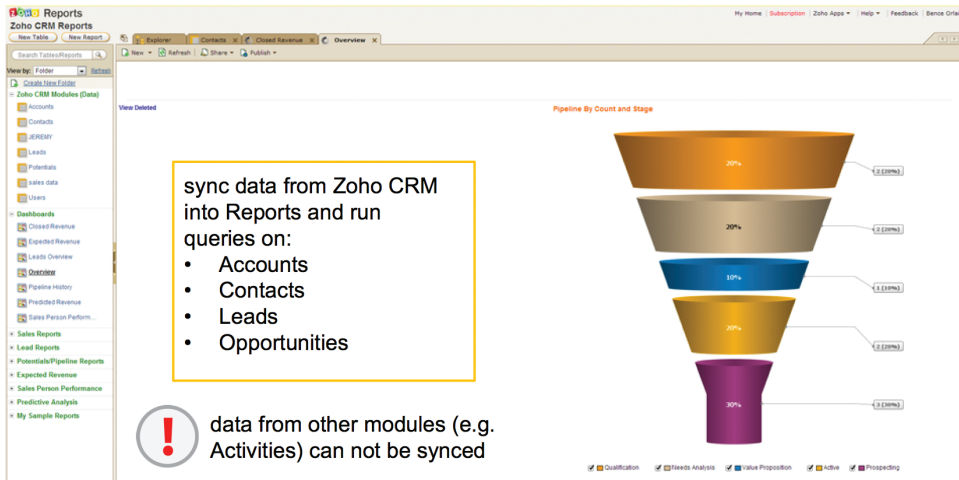
**Zoho Reports**

Recent Items

**Create Reporting Database:**

- Import Excel, CSV, HTML, Google Drive**  
Create a reporting database by importing data from Excel, CSV, Google Spreadsheets and HTML files  
[Video Demo](#)
- Enter Data Right Away**  
Create a new reporting database by directly entering data.
- Import data from Local Databases**  
Import and Synchronize data from your local databases (behind fire...

# Zoho CRM Analytics



The screenshot displays the Zoho CRM Reports interface. On the left, a sidebar lists various report categories: Zoho CRM Modules (Data), Dashboards, Sales Reports, Lead Reports, Potential/Pipeline Reports, and Predictive Analysis. The main content area shows a funnel chart titled "Pipeline By Count and Stage". The funnel is divided into five stages with the following percentages: 20%, 20%, 10%, 20%, and 20%. A legend at the bottom identifies the stages as Qualification, Needs Analysis, Value Proposition, Active, and Prospecting. A yellow box highlights the text: "sync data from Zoho CRM into Reports and run queries on:" followed by a list of modules: Accounts, Contacts, Leads, and Opportunities. A red exclamation mark icon is placed next to the text: "data from other modules (e.g. Activities) can not be synced".

sync data from Zoho CRM into Reports and run queries on:

- Accounts
- Contacts
- Leads
- Opportunities

! data from other modules (e.g. Activities) can not be synced

Pipeline By Count and Stage

Stage	Percentage
Qualification	20%
Needs Analysis	20%
Value Proposition	10%
Active	20%
Prospecting	20%

# Live demo



Switch to Zoho CRM and demo:

- Zoho Reports overview

## Additional Info

More information on this subject on the Zoho website:

<http://www.zoho.com/crm/help/reports-and-dashboards.html>

<http://www.zoho.com/crm/help/reports/>

<http://www.zoho.com/crm/help/reports/generate-reports.html>



# Mobile CRM for Field Salespeople

# Introduction

The development of mobile technology is revolutionizing the way business is done – collaboration and communication is easier than ever before. With Zoho CRM, you can now reach your CRM system on your mobile device, extending the capabilities of your CRM system and increasing your productivity, efficiency and flexibility.

## **Objective of this session**

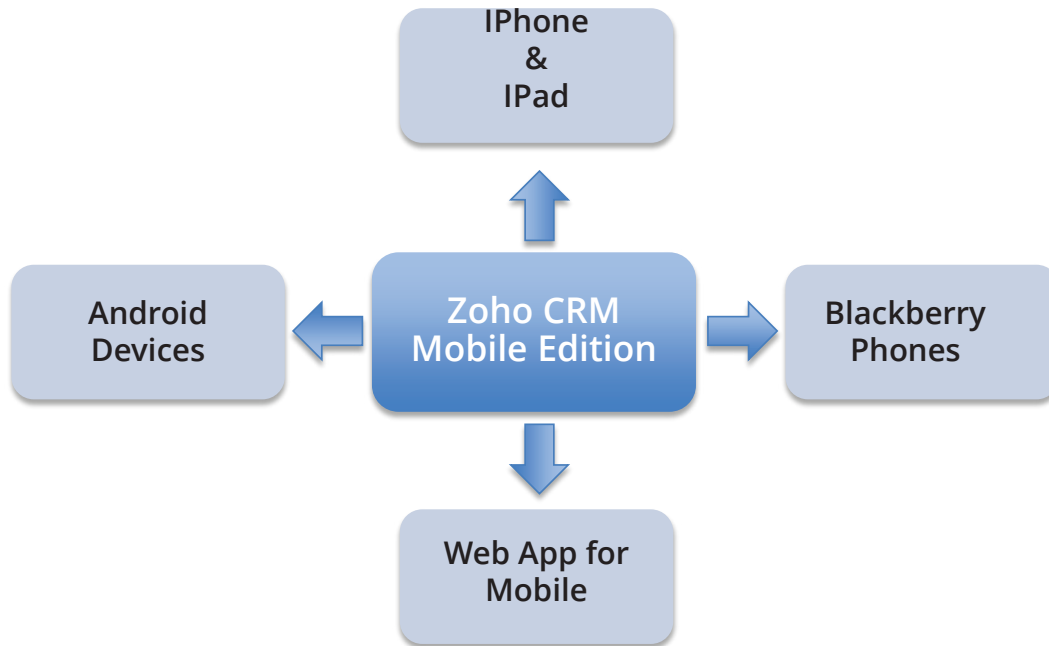
- Understand importance of Mobile Sales
- Activate Mobile App from CRM
- Download Mobile Apps
- Sync Contacts
- Sync Calendar

## **Why do field sales need a Mobile CRM?**

- Allows sales Executives to quickly access information on the go from their device
- Gives up-to-date customer information and saves time for you to meet other clients
- As sales manager, you can follow the performance of the sales team
- CRM data updated by sales executives is automatically synchronized to the system for access.

## **Benefits of a Mobile CRM**

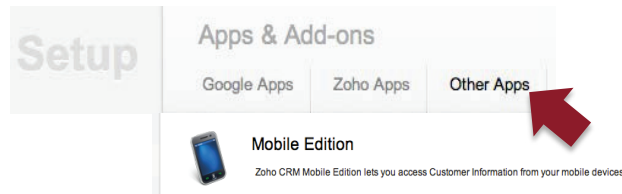
- Access CRM from anywhere
- Streamlines sales processes
- Increase personal attention with prospects
- Up-to-date customer information at your fingertips
- Prompt customer interaction
- Instant email notification
- Improve sales follow-up accuracy



# Mobile Edition of Zoho CRM

iPhone / iPad/ Android devices / Blackberry phone

**Step 1:** Purchase Mobile Edition licenses (Administrator)



**Step 2:** Activate Mobile Edition for User (Administrator)

## Users List:





Full Name	Email Address	Role	Profile	User Status	Zoho CRM Mobile Edition
Tricia Boyle	patriciaab@zillum.com	CEO	Administrator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Marty Sinclair	kylesinclair95@yahoo.com	Sales Manager	Standard	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

**Step 3:** Install app (User)

Depending on the mobile device users can install the Zoho CRM mobile app from App Store / iTunes , Google Play, Blackberry browser

# Installing Mobile App

iPhone / iPad/ Android devices / Blackberry phone

	<b>iPad</b>	<b>Get it from</b> <ul style="list-style-type: none"><li>▶ iTunes</li><li>▶ App Store</li></ul>
	<b>iPhone</b>	<b>Get it from</b> <ul style="list-style-type: none"><li>▶ iTunes</li><li>▶ App Store</li></ul>
	<b>Android</b> (Models: All Android phones running OS v2.2 and higher)	<b>Get it from</b> <ul style="list-style-type: none"><li>▶ Google Play</li></ul>
	<b>BlackBerry</b> (Models: Series 90xx (Bold), Series 95xx (Storm)*, Series 96xx (Tour), Series 97xx (Bold 2), Series 98xx (Torch)*)	<b>Get it from</b> <ul style="list-style-type: none"><li>▶ Install in BlackBerry</li></ul>

## Supported Modules

- Leads
- Accounts
- Contacts
- Potentials
- Cases
- Vendors
- Tasks
- Events
- Calls



## What can you do?

- Add tasks, events and notes to a lead, an account or a contact
- Create, View, Update and Delete records
- Import contacts to Zoho CRM app
- Export contacts and leads from Zoho CRM to mobile device
- Find your nearby customers and get the driving directions from the address information
- Send Emails and make calls to leads and contacts
- Log calls made to leads and contacts instantly
- Search for records either in the server or in your device

# Manage Records

You can create , edit, delete and save a record in the supported modules.

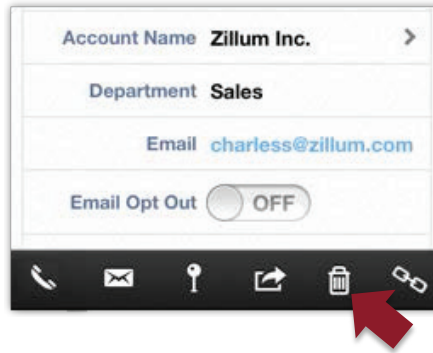
- To create a record,  
tap the Add Record icon



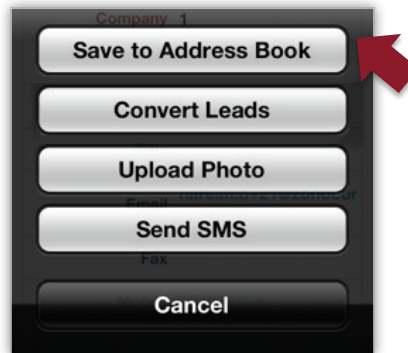
- To edit a record,  
tap the Edit icon in the record details page.



- To delete a record, go to the record details page and tap the Delete icon

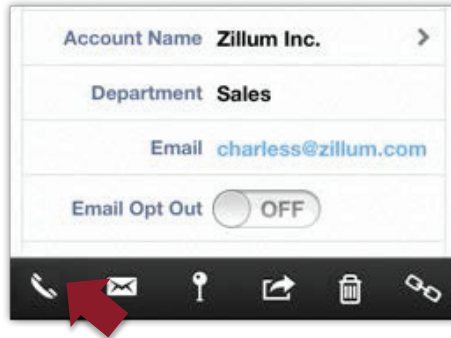


- Save the lead or contact details in your mobile device address book by tapping the more options



# Make Calls

With the Mobile Edition, you can make calls to your customers using Skype by selecting the record in Zoho CRM and initiating the call.

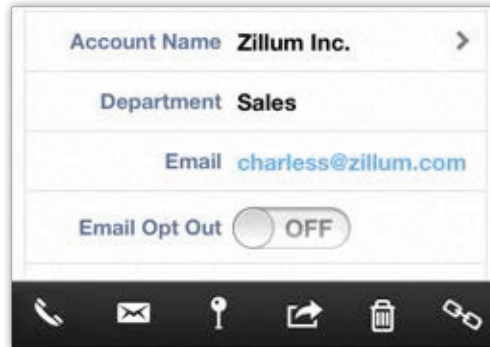


**Log a Call:** After making calls to your customer, you can instantly log your calls.

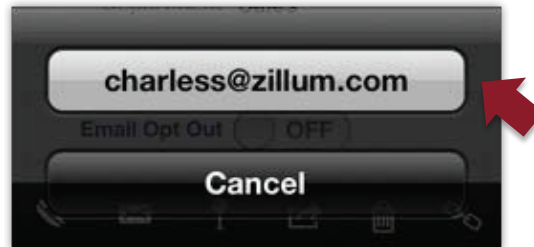


# Send Emails

You will have the option to send an email to the contact if the email address is available.



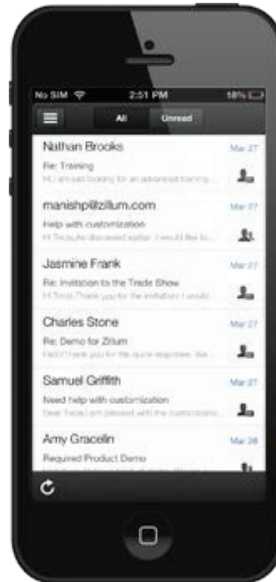
Tap the email address to compose an email and send.



# MailMagnet

For a field sales rep on the move, the MailMagnet option is very useful to receive instant notifications so that the most important emails from leads and contacts get your immediate attention.

MailMagnet intelligently scans your inbox and notifies you of the emails from your prospects and customers in CRM.



Note:

MailMagnet is available only if you enable the Zoho Mail Add-on feature and configure your email account within Zoho CRM.

# Locate Nearby Contacts

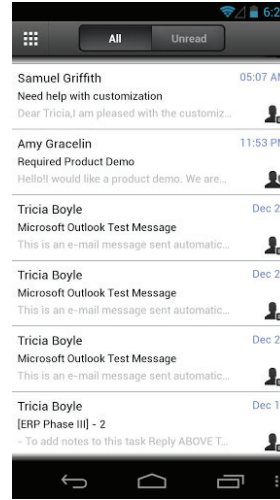
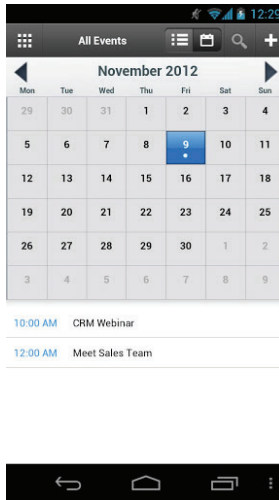
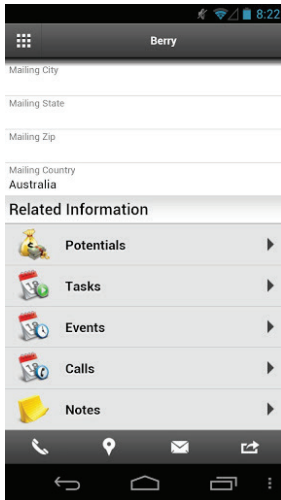
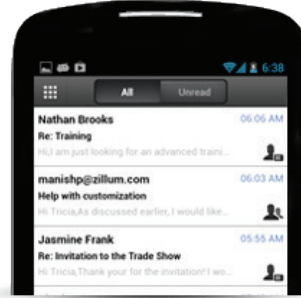
With the location service enabled in your device, your phone's map can find you the leads, contacts and accounts a few miles around your location. This is based on the miles specified in Zoho CRM's Settings.



## Note:

All the leads/contacts/accounts near your location will be pinned on the map, irrespective of the ownership of the record or other criteria.

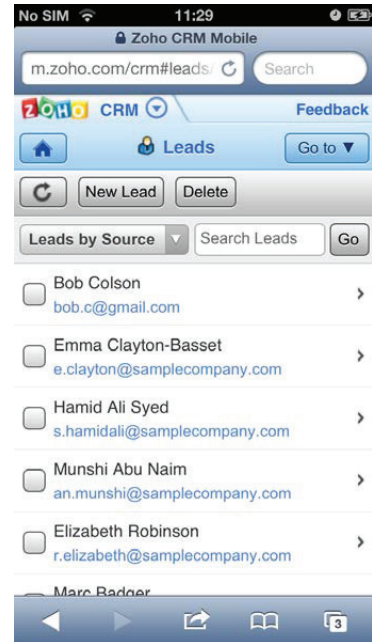
# Android App



# Accessing Mobile CRM from Web Browser

- Zoho CRM web application allows you to access and work with your Online Zoho CRM data with your browser-supported mobile device.
- Users can manage leads, accounts, contacts, potentials, cases, tasks, events, and calls.
- To use this application you need to have a valid Zoho CRM account.

**URL - <http://mobile.zoho.com/crm>**



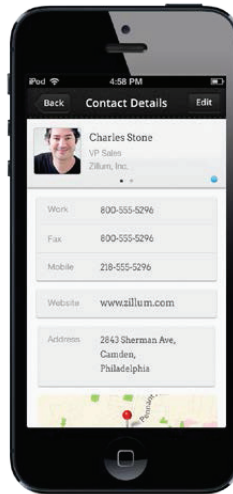
# Card Scanner

The Card Scanner App lets you save business cards on your iPhone when you attend meetings, events, conferences and trade shows. The app intelligently recognizes the contact information and fills in the data in the appropriate fields.

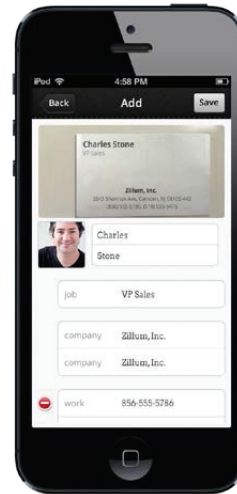
Step 1  
Scan the BCard



Step 2  
Save details in Zoho CRM



Step 3  
Edit details



Note:

The app instantly recognizes and reads business cards in English, French, Spanish or German.

# What you can't do on Mobile

- Customize CRM as per your business needs
- Set up workflow rules
- Add or modify users, roles and permissions
- Manage email templates
- Manage reports and dashboards
- Send mass email
- Manage subscriptions

# Things to Remember

- Users do not need to purchase separate licenses for different devices.
- Only users with the mobile edition license activated, can download and install the app in their devices.
- Additionally, users also have access to the web app in their mobile devices.
- Users can access data from the Leads, Accounts, Contacts, Potentials, Cases, Tasks, Events and Calls modules.
- Users can work in the offline mode to add, modify, or delete records which will be saved locally and synchronized with the Online Account, when connected to the network.
- You can log only outbound calls.
- MailMagnet will be available only if you enable the Zoho Mail Add-on feature and configure your email account within Zoho CRM.

# CRM and Email Integration

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# Introduction

Email communication has changed the way we do business today and having your CRM integrated with Email is no more a luxury. In this session, you will learn importance of CRM plus Email to collaborate with colleagues and close more deals for your company.

## Objective of this session

- Understand importance of Email in Sales
- Send Email from CRM
- Configure Email Integration
- Receive Emails within CRM
- Receive Mail Notifications
- Copy emails from 3<sup>rd</sup> party mail clients
- Integration with MS Outlook

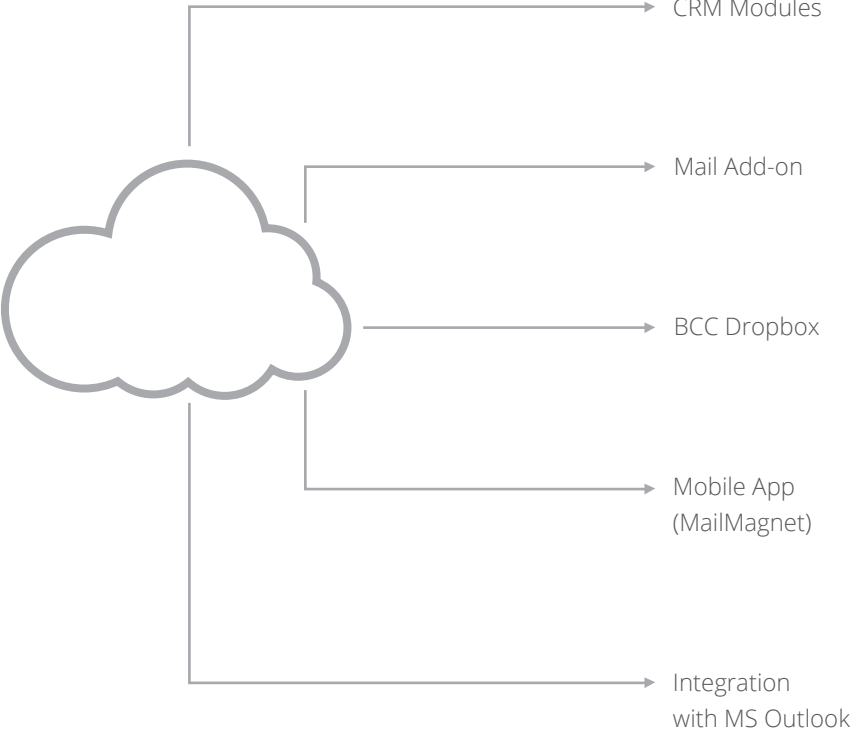
## Why is this an Important Integration?

- To centralize all customer information and email correspondence inside Zoho CRM.
- To associate customers' email conversation with CRM data.
- Share and update customer-specific emails with other users within the account.
- Send and receive emails simultaneously in CRM and your favorite POP enabled email client.

## What can you get from this Integration?

- Email tab inside Zoho CRM
- You can send and receive all your emails without leaving Zoho CRM
- Share customer emails with colleagues (emails from selected records or all records)
- Thread view of Email conversations
- Get quick email notifications of the emails from prospects and customers.
- Integrate with Gmail, Yahoo, Hotmail and any other POP email services

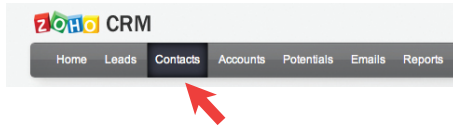
# Ways to send/receive emails inside Zoho CRM



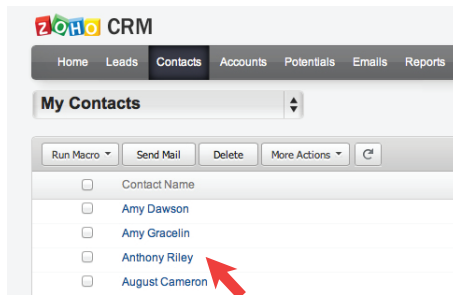
# Sending Emails from the CRM modules

Leads, Contacts or Potentials

Step 1: Click the Module tab.



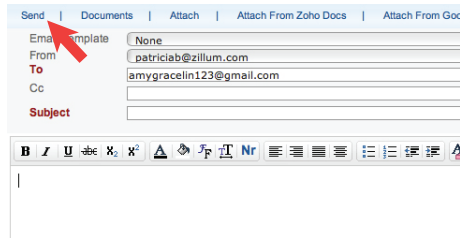
Step 2: In the Module homepage, select the record from the List View.



Step 3: In the Record Details page, go to **Emails Related List** and click **Send Mail**.



Step 4: In the Compose Mail page, enter the email message, attach files and click **Send**.



Note: The email will be sent to the recipients with a copy of the mail stored under **Emails Related List**, in the sent folder of Zoho Mail and your configured mail client.

## Things to Remember

- In Zoho CRM, you can send either bulk emails or individual emails.
- The limit for sending emails is based on your account's Edition.
- The email limit for the organization is calculated based on the total number of confirmed and active users in the account.
- For sending bulk emails or newsletters, use Zoho Campaigns.

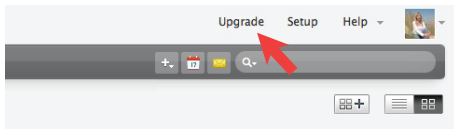
# Zoho Mail Add-on

Administrator needs to activate this feature for other users.

In order to keep the customer-specific Emails in your Zoho CRM account or share with other users within the account you need to configure the Zoho Mail Add-on.

Administrator's part:

Step 1: Subscribe for the Mail Add-on



Step 2: Activate Mail Add-on for the Users

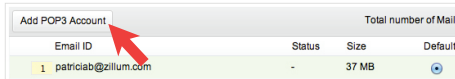
## Users List:


Full Name	Email Address	Role	Profile	User Status	Zoho Mail Add-on
Patricia Boyle	patriciab@zillum.com	CEO	Administrator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Hiyoshi	kylesindlar95@yahoo.com	Sales Manager	Standard	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Once the administrator has configured and enabled the Zoho Mail add-on, Users need to set up the mail account by configuring the POP service for their Email account.

User's part:

Step 1: Set up Mail Account (POP)



Add POP3 Account		Total number of Mail		
Email ID	Status	Size	Default	
1 patriciab@zillum.com	-	37 MB		


Step 2: Configure Mail Add-on


While configuring Zoho Mail Add-on, you can choose to share the customer Emails with other users or keep them personal in your Zoho CRM account.

### Zoho Mail Add-on

#### 1. Zoho Mailbox

Choose a mailbox from which the customer emails should be pulled inside.

Patricia Boyle<patriciab@zillum.com>  + Add new Mailbox



# Things to Remember

- With the Mail Add-on configuration you can keep emails **Private**; **Public**; and **Custom sharing**.
- In the Private mode, you do not share the emails for leads and contacts with your colleagues.
- In Public mode, all emails from leads and contacts are shared globally with other users.
- In Custom sharing mode, you can share emails from selected leads and contacts with other users.
- If you ever change the password of your POP account, you need to update the password in the Zoho Mail settings.
- After configuring Mail add-on, if the Email tab is not visible, check the “more tabs” dropdown.
- You can have thread view of customer emails inside CRM

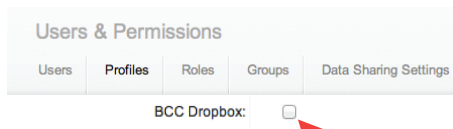
# BCC Dropbox

## Connecting to 3<sup>rd</sup> Party email clients

You can now converge all your business communication from multiple business email accounts into a single place. The BCC Dropbox provides a unique email address for each user in your Zoho CRM account. Bcc'ing this unique email address when you send emails to your customers gets you a copy of the email in your Zoho CRM, associating it with the right Lead or Contact.

Administrator's part:

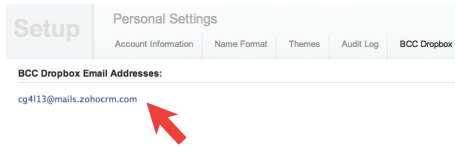
Activate this feature for users in their different profiles



By default, this feature is enabled for the Administrator and Standard profiles. The activation is required for those with different profiles.

User's part:

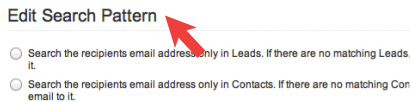
Once the feature is enabled, Users can go to the personal settings to get the unique email address.



## What more can you do?

1. Define Search pattern:

Users can define a search pattern to associate the email with Contact or Lead or even choose to create a new record if no matching records are found in Zoho CRM account.



## 2. Regenerate Email address :

By any chance if a user realizes that his / her unique email address is being used to spam the mailbox, or for any other occasion arises, he / she can regenerate the unique email address. The old address will no more get associated with the Zoho CRM account.

### **BCC Dropbox Email Addresses:**

---

[cg4113@mails.zohocrm.com](mailto:cg4113@mails.zohocrm.com)



## 3. Download as vCard:

Downloading your unique email address as a vCard help you store this in places that are easy to access, specially when you are on the go and still can send business emails into your Zoho CRM account.

---

[Regenerate](#) | [Download as vCard](#)



### **Zoho CRM BCC Dropbox**

email [cg4113@mails.zohocrm.com](mailto:cg4113@mails.zohocrm.com)

note

## Things to Remember

- The BCC Dropbox email address can be used only for the Leads and Contacts modules.
- You can associate a maximum of 5 email addresses from which you send mails to your leads or contacts.
- The emails will be listed under “Sent Emails from CRM” option in the drop-down.

# Mobile App

Available for iPhone, iPad, Android phones and BlackBerry

With this native app for your mobile devices, you can now work with your Zoho CRM account on the go. You can access data from the modules. Additionally you can work in the offline mode to add, modify or delete records – these will get synchronized with your Online Account, when you connect to the network.

## What can you do?

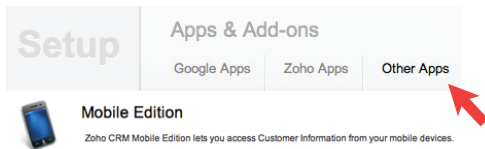
- Add tasks, events and notes to a lead, an account or a contact
- Create, View, Update and Delete records
- Import contacts to Zoho CRM app
- Export contacts and leads from Zoho CRM to mobile device
- Find your nearby customers and get the driving directions from the address information
- Send Emails and make calls to leads and contacts
- Log calls made to leads and contacts instantly
- Search for records either in the server or in your device

# What do you benefit?

- Prompt customer interaction
- Access CRM from anywhere
- Instant email notification
- Improve sales follow-up accuracy

# How does it work?

Step 1: Purchase Mobile Edition licenses (Administrator)



Step 2: Activate Mobile Edition for User (Administrator)

Users List:

Full Name	Email Address	Role	Profile	User Status	Zoho Mail Add-on
Patricia Boyle	patriciab@zillum.com	CEO	Administrator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Hiyoshi	kyleinclair95@yahoo.com	Sales Manager	Standard	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

A red arrow points to the 'Zoho Mail Add-on' checkbox for the user 'Hiyoshi'.

Step 3: Download and Install app in the device (User)

After activation, the users can download and install the app in their iPad, iPhone, Blackberry, or Android devices.

MailMagnet:

Timely response to customers emails is important and email notification plays a vital role in this. MailMagnet provides instant notifications to your mobile device so that the most important emails from leads and contacts get your immediate attention.



# Things to Remember

- You need not purchase the mobile edition license separately for different devices.
- Work in offline mode will be saved locally and synchronized with your Online Account, when you connect to the network.
- MailMagnet will be available only if you enable the Zoho Mail Add-on feature and configure your email account within Zoho CRM.

# Integration with MS Outlook

## Administrator needs to activate this feature

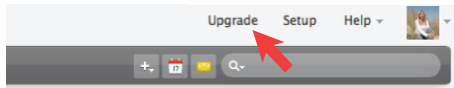
For those Zoho CRM users who use MS Outlook for business communication, this Plug-in for MS Outlook helps in synchronizing the contacts, tasks and events between Zoho CRM and Microsoft Outlook. Additionally, they can copy customer-specific emails (incoming/outgoing) from MS Outlook to Zoho CRM and create cases based on customer(s) email messages.

## What can you do?

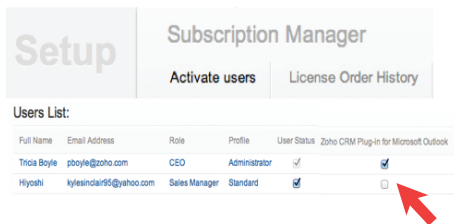
- Synchronize contacts, calendar and tasks between Microsoft Outlook and Zoho CRM
- Associate Outlook inbound and outbound emails with Leads, Contacts or Potentials in Zoho CRM
- Modify email message and file attachments to the Lead or Contact in Zoho CRM without modifying the original
- message in Microsoft Outlook Export contacts, calendar (events) and tasks from Microsoft Outlook to Zoho CRM
- Add emails as Cases to Zoho CRM
- Resolve conflicts while synchronizing contacts, calendar and tasks with Zoho CRM so that there is no duplication of customer data

# How does it work?

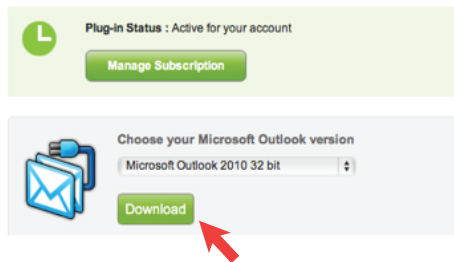
Step 1: Subscribe for the plug-in (Administrator)



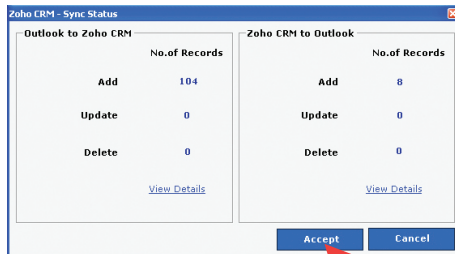
Step 2: Activate plug-in for the Users (Administrator)



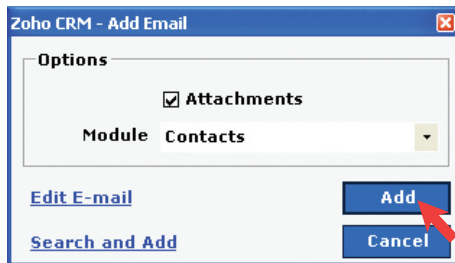
Step 3: Download and Install plug-in (User)



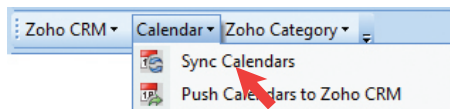
Step 4: Sync contacts between MS Outlook and CRM



Step 5: Send Email to leads or contacts and copy to CRM



Step 6: Sync calendar between MS Outlook and CRM



# Things to Remember

- Zoho CRM Plug-in for MS Outlook is available only for Windows OS with 32 or 64-bit processors. You cannot use in other operating systems.
- Contacts, Calendar, Tasks, in MS Outlook can be synchronized with your Online CRM Account, when you connect to the Internet.
- Use proper conflict resolution settings to overcome duplicate data and loss of data before synchronization

# Zoho CRM - Website Integration

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## Session schedule



Website integration overview

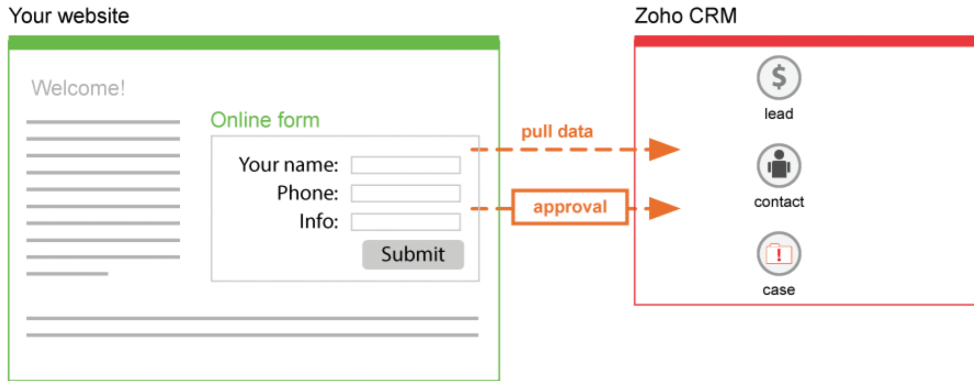


Web-to-... forms



Making it happen

# Website integration



# Website integration

Feed prospect data from your website into CRM

## Web to Lead

- capture business interest
- place on product pages, landing pages

## Web to Contact

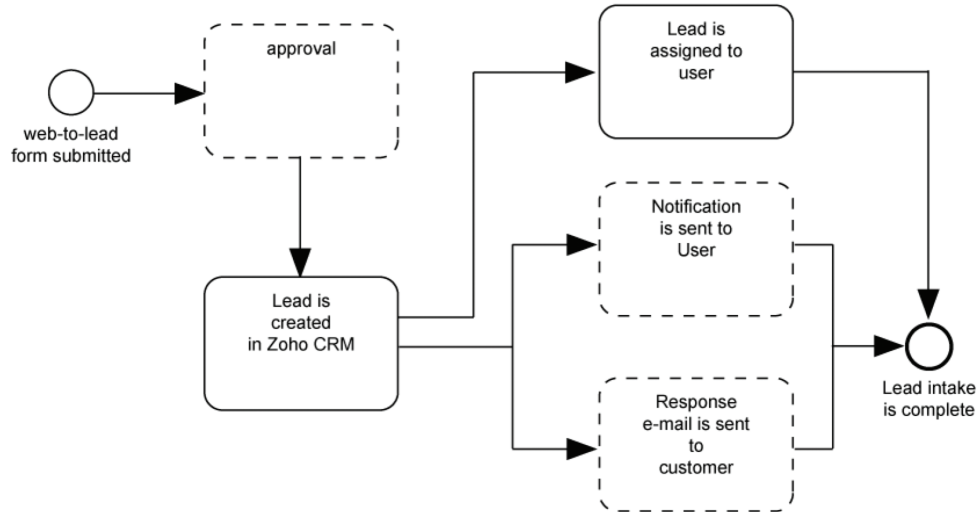
- sign ups or other personal info
- place on Contact Us

## Web to Case

- customer service requests
- place on Support or similar page

# Web-to-Lead/Contact

The Lead/Contact submittal workflow

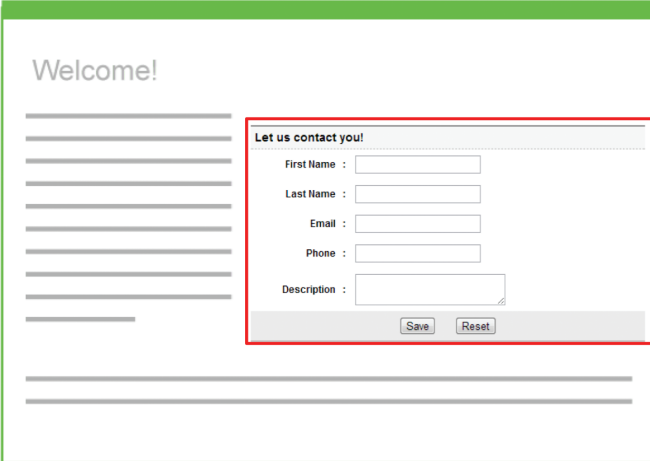


# Web-to-Lead/Contact

## To set up a Lead/Contact form

- define URL + return
- define fields
- approval: optional
- assignment: user or rule
- set up notification + acknowledgement
- generate code

## Your website



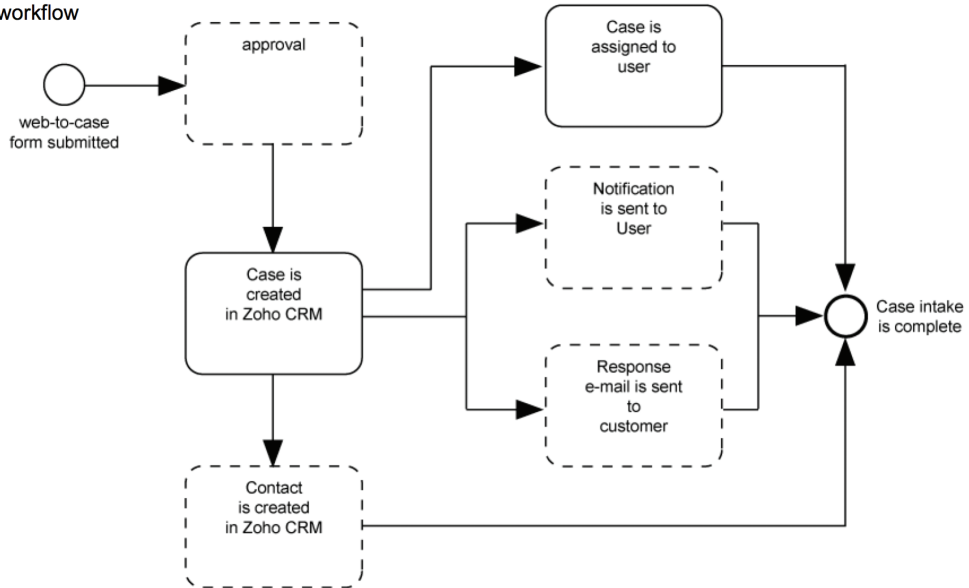
The screenshot shows a website layout with a green border. At the top left, it says "Welcome!". Below this are several horizontal lines representing text. On the right side, there is a contact form titled "Let us contact you!". The form contains the following fields:

- First Name :
- Last Name :
- Email :
- Phone :
- Description :

At the bottom of the form, there are two buttons: "Save" and "Reset".

# Web-to-case

The Case submittal workflow

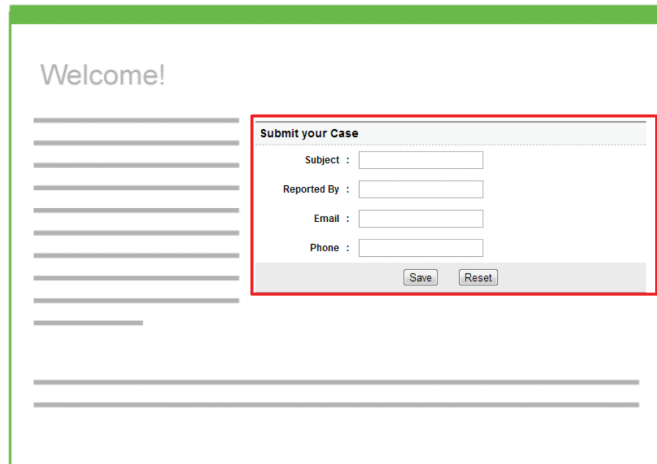


# Web-to-case

## To set up a Case form

- define URL + return
- define fields
- approval: optional
- assignment: user or rule
- **contact creation**
- set up notification + acknowledgement
- generate code

## Your website



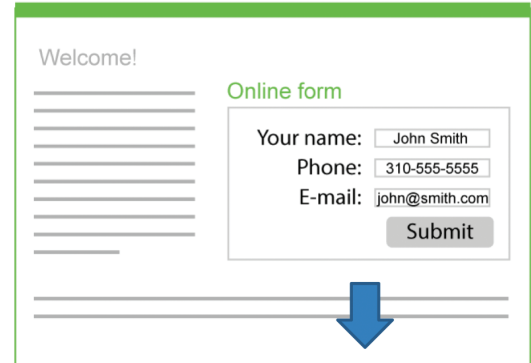
The screenshot shows a website interface with a green header bar. Below the header, the word "Welcome!" is displayed in a large, grey font. To the right of the welcome message is a form titled "Submit your Case" enclosed in a red border. The form contains four input fields: "Subject", "Reported By", "Email", and "Phone". Below these fields are two buttons: "Save" and "Reset". The rest of the page is filled with horizontal grey lines representing content that has been redacted.

# Auto Response

## To set up an automatic email response

- define rule
- create rule entry
- set up criteria
- assign e-mail template

### Your website



Welcome!

Online form

Your name:

Phone:

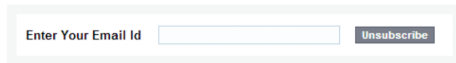
E-mail:

A large blue arrow points downwards from the bottom of the form area.



# Unsubscribe form

Generate HTML code that can be embedded in a webpage for user unsubscribe. The link can be used in outbound email marketing



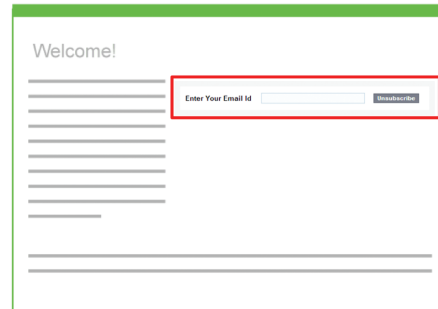
Enter Your Email Id



Email Opt Out:

**An e-mail address submitted  
thru the form will be marked as  
opted out**

Your website



Welcome!

Enter Your Email Id

The screenshot shows a website layout with a green header bar. Below the header, the word "Welcome!" is displayed. To the right of the main content area, there is a red-bordered box containing the unsubscribe form: "Enter Your Email Id" followed by a text input field and an "Unsubscribe" button. The rest of the page content is represented by several horizontal grey lines.

# Making it happen

The screenshot displays a software setup interface. On the left is a vertical sidebar with the heading 'Setup' and several menu items: 'Personal Settings', 'Users & Permissions', 'Organization Settings', 'Customization', 'Automation', and 'Templates'. The 'Website Integration' menu item is highlighted with a red box and a circled '1'. The main content area is titled 'Website Integration' and contains a horizontal tabbed menu with five tabs: 'Web-To-Lead Form', 'Web-To-Contact Form', 'Web-To-Case Form', 'Auto Response Rules', and 'Unsubscription Form'. The 'Web-To-Case Form' tab is selected and highlighted with a red box and a circled '2'. Below the tabs, the 'Web to Case' section is visible, featuring a green button labeled 'Create New Form' and a paragraph of explanatory text.

**1** Website Integration

Website Integration

Web-To-Lead Form Web-To-Contact Form **Web-To-Case Form** Auto Response Rules Unsubscription Form

### Web to Case

Web forms will capture the visitors or users information from your website into your CRM system as Cases. Customizing the web forms, auto-assigning to specific users can be done with ease.

**Create New Form**

# Making it happen

## Form basics

### Form Properties

Name your web form and provide the Return URL and Domain Name details for the form

3

\*Form Name:

\*Return URL:  

\*Domain Name:  

the URL can be broad or very specific

# Making it happen

Define the fields to include in the form

## Fields Selection

4

Select the field(s) to be displayed in the web form

### Fields List:



- |   |   |   |
|---|---|---|
| <input checked="" type="checkbox"/> Status      | <input type="checkbox"/> Priority               | <input type="checkbox"/> Type               |
| <input type="checkbox"/> Case Reason            | <input checked="" type="checkbox"/> Case Origin | <input checked="" type="checkbox"/> Subject |
| <input checked="" type="checkbox"/> Reported By | <input checked="" type="checkbox"/> Email       | <input checked="" type="checkbox"/> Phone   |
| <input type="checkbox"/> Description            | <input type="checkbox"/> Internal Comments      |   |

Required fields will be automatically added

# Making it happen


## Additional settings

**5** **Case Approval**  
 Approve the Cases coming through this web form manually. **Manual approval reduces junk and spam**

**6** **Case Assignment**  
 Select a user as owner:    
 Select an Assignment Rule to assign owner: **None**  [Manage Assignment Rules](#) **Assign to a specific user or use a criteria based rule to assign to different users**

**7** **Enable Contact Creation**  
Contacts will be created while submitting the Cases and will be related to the respective Cases. Contacts will be created only if it does not exist in Zoho CRM.  
 Enable Contact Creation **A Contact can be created for the Case**

**8** **Email Notification**  
Set up the automated actions to be triggered when a visitor submits information through the web form

**Email Acknowledgement :**  
You can select an Email Template below, to send an auto-response email to the prospect (Email id: )  
  [Manage Templates](#) **Automated response to the customer / notification to the CRM user**

**Notify Owner :**  
 Notify Case Owner

# Making it happen

## Copy and paste the code

### Result

#### Web-To-Cases Form

✔ Form generated successfully

Use the form shown below to embed in your site

```
<div id='crmWebToEntityForm' align=center><META HTTP-EQUIV='content-type' CONTENT='text/html;charset=UTF-8'> <form action='https://crm.zoho.com/crm/WebToCaseForm' name='WebToCases38082600000251013' method='POST' onSubmit='javascript document.charset="UTF-8";return checkMandatory()' accept-charset='UTF-8'><table border=0 cellspacing=0 cellpadding=5 width=480 style='border-top:2px solid #999999;border-bottom:1px solid #999999;background-color:#ffffff;'> <input type='text' style='display:none,' name='xnQsjsdp' value='Z2Hn8lPP53g$/'> <input type='hidden' name='zc_gad' id='zc_gad' value='/'> <input type='text' style='display:none,' name='xmlwLd' value='nHZUJKtpGUhnlx4yUWp22ohtUVz56G-'> <input type='text' style='display:none,' name='actionType' value='Q2FzZXI-'> <input type='text' style='display:none,' name='returnURL' value='https://crm.zoho.com/crm/setup/planner.do?page=WebToEntityForm.do?module=Leads&tab=webInteg&in=webLeads#edit_Leadsbck' /> <br><tr><td colspan='2' align='left' style='background-color:#f5f5f5;border-bottom:2px dotted #dadada,color:#000000;font-family:sans-serif;font-size:14px;'><strong>Web Form</strong></td><tr><tr><td nowrap style='font-family:sans-serif;font-size:12px;font-weight:bold' align='right' width='25%'>Status &nbsp; &nbsp;&nbsp;&nbsp;&nbsp;&nbsp;&nbsp;</td><td width='75%'><select name='Status'> <option value='New'>New</option> <option value='Escalated'>Escalated</option> <option value='On Hold'>On Hold</option> <option value='Closed'>Closed</option> </select></td><tr><td nowrap style='font-family:sans-serif;font-size:12px;font-weight:bold' align='right' width='25%'>Case Origin &nbsp;&nbsp;&nbsp;&nbsp;&nbsp;&nbsp;&nbsp;&nbsp;</td><td width='75%'><select name='Case Origin'> <option value='None-'>None</option> <option value='Email'>Email</option> <option value='Phone'>Phone</option> <option value='Web'>Web</option> </select></td></tr></tr><tr><td nowrap style='font-family:sans-serif;font-size:12px;font-
```

HTML+JavaScript code

9

# Using in WordPress

## To use the forms in WordPress either

- enable JavaScript, which is blocked from content by default
  - or
- use GravityForms + a 3rd party plugin

# Tweaks

The HTML + JS code can be manually tweaked to

- rearrange the form layout or remove fields
- change the style of the form by altering the CSS code
- push “silent” fields by adding hidden `<input>` fields
- disable required field check by removing the `checkMandatory()`

```
<form action='https://crm.zoho.com/crm/WebToLeadForm' name=WebT
  <table border=0 cellspacing=0 cellpadding=5 width=480 style
  <input type='text' style='display:none;' name='xnQsjsdp
  <input type='hidden' name='zc_gad' id='zc_gad' value=''
  <input type='text' style='display:none;' name='xmIwtLD'
  <input type='text' style='display:none;' name='actionT
  <input type='text' style='display:none;' name='returnUR
  <tr>
    <td colspan='2' align='left' style='background-colo
      <strong>Let us contact you!</strong>
    </td>
  </tr>
  <tr>
    <td nowrap style='font-family:sans-serif;font-size:
      <td width='75%'><input type='text' maxlength='40' n
    </td>
  </tr>
  <tr>
    <td nowrap style='font-family:sans-serif;font-size:
      <td width='75%'><input type='text' maxlength='80' n
    </td>
  </tr>
  <tr>
    <td nowrap style='font-family:sans-serif;font-size:
      <td width='75%'><input type='text' maxlength='100'
    </td>
  </tr>
  <tr>
    <td nowrap style='font-family:sans-serif;font-size:
      <td width='75%'><input type='text' maxlength='30' n
  </td>
  <td colspan='2'><input type='text' maxlength='1000' width='250' height='250'></td>
  </tr>
  <tr>
    <td colspan='2'><input type='submit' name='save' value=Save /> &nbsp;
  </td>
  </tr>
  <script> var mndFields=new Array('Last Name');var fldLangVal=ne
  replace(/\s+|\s+/g, ' ').length==0) [alert(fldLangVal[i] + ' cannot
  .focus(); return false;)]};</script>
```

# Live demo



## Switch to Zoho CRM and demo:

- setting up a Web-to-Case form
- point out the difference with Web-to-Lead forms
- show the form code

## Additional Info

More information on this subject on the Zoho website:

<http://www.zoho.com/crm/help/web-forms/>



# Extending your CRM with Zoho Creator

# Session Schedule

- Custom Objects
- CRM fields in Zoho Creator
- Related Lists and Custom Related Lists
- Custom Portal

# Custom Objects

Each CRM Module – A self contained database. Ex: Leads, Contacts, Accounts etc.

Custom database tables modeled to suit your internal need – Custom Objects.

Extend the scope of your CRM.

Store data that do not belong to standard CRM Modules.

# Custom Objects

Link one record in a CRM Module to multiple non Module records . Ex: Payroll records – time cards for each pay period.

Use Custom Objects to automate processes that are connected to the data contained in your CRM.

Apart from the standard modules of a CRM, Custom Objects can be created.

## Custom Objects in Zoho CRM

Zoho Creator – helps you create Custom Objects within your Zoho CRM account.

Zoho Creator is a platform that allows you to build customized database applications.

# Custom Objects in Zoho Creator

Each Zoho Creator application has 2 main components – Forms & Reports.

Forms are the visual equivalent of databases.  
Reports display the data contained in the database.

## Demo:

Create any Form [database] for your requirement using Zoho Creator and use it in your CRM as a Custom Object.

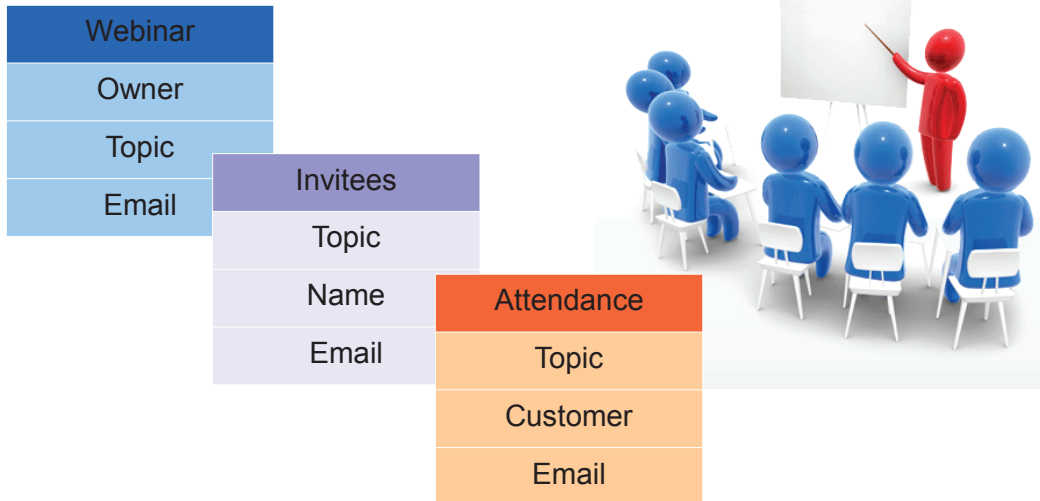
How to create forms in Zoho Creator?

# Exercise: Event Management

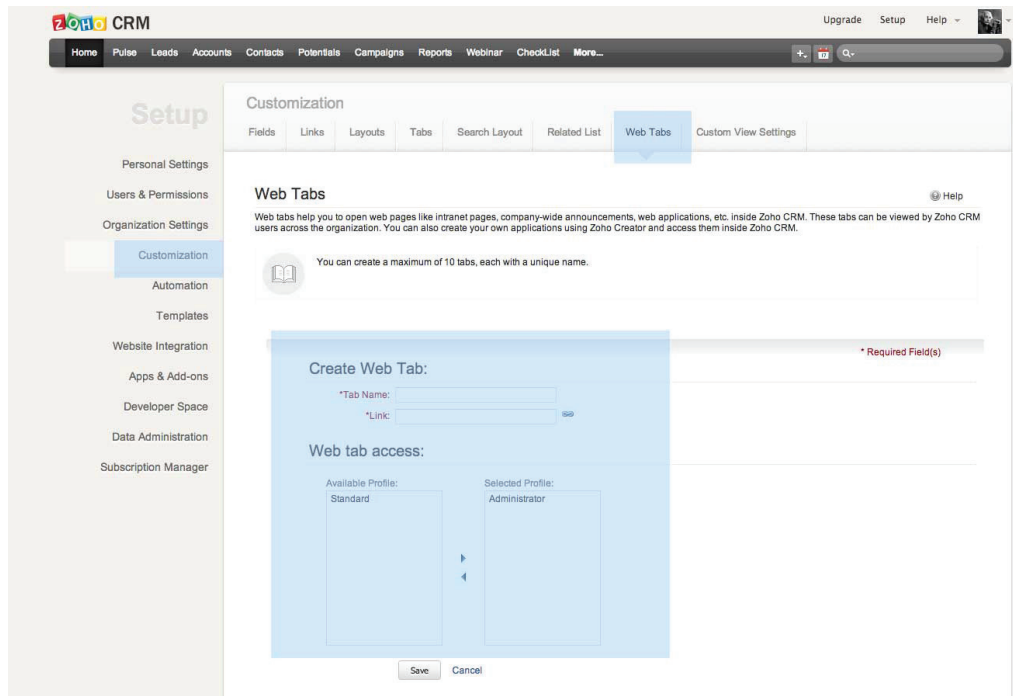
Capture Webinar and Sales Demo registrations.

Allocate ownership of sessions to sales reps.

Track attendance as CRM activity.



# Including Custom Objects in Zoho CRM



The screenshot displays the Zoho CRM interface, specifically the 'Customization' section under 'Setup'. The 'Web Tabs' sub-section is active, showing a 'Create Web Tab' dialog box. The dialog box contains the following elements:

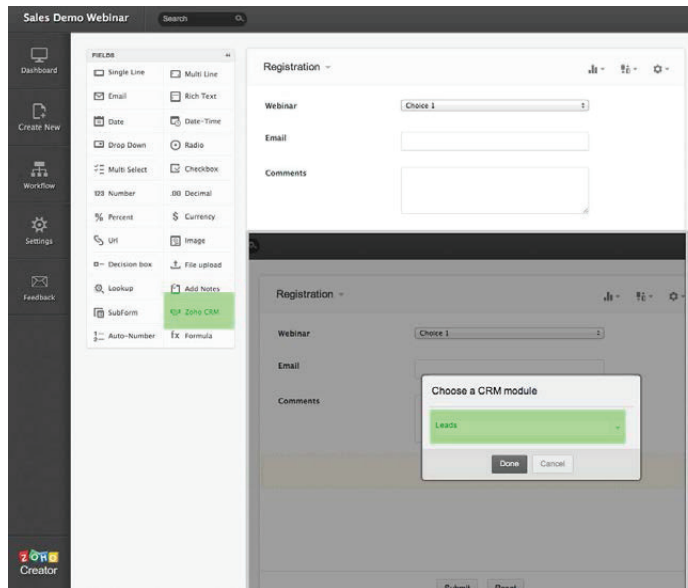
- Header:** 'Create Web Tab:'
- Fields:** Two required fields: '\*Tab Name:' and '\*Link:'. The '\*Link:' field includes a small globe icon.
- Section:** 'Web tab access:'
- Profiles:** Two columns of profile selection boxes. The 'Available Profile:' column shows 'Standard', and the 'Selected Profile:' column shows 'Administrator'. A double-headed arrow is positioned between the two columns.
- Buttons:** 'Save' and 'Cancel' buttons at the bottom.

Background text in the 'Web Tabs' section includes: 'Web tabs help you to open web pages like intranet pages, company-wide announcements, web applications, etc. inside Zoho CRM. These tabs can be viewed by Zoho CRM users across the organization. You can also create your own applications using Zoho Creator and access them inside Zoho CRM.' and 'You can create a maximum of 10 tabs, each with a unique name.'

# CRM Field in Zoho Creator

Apart from regular fields, Zoho Creator also has a Zoho CRM field.

This field relates the records of any CRM module to the records contained in the form.



# Two way Integration.

Deluge – Zoho Creator's language can read/write data from/to Zoho CRM.

Data in Zoho CRM can be read and used to add additional related data.

Data captured through Zoho Creator webform can be pushed to any CRM module.

# Read/ Write Data in CRM

Using Zoho Creator Workflow,the following can be done to CRM modules.

- Create a new record in any Module.
- Fetch records from any Module.
- Search records across Modules.
- Search records by PDC
- Update record(s).
- Get related records.

## Exercise : CRM Fields and Workflow

Create a webform for capturing Demo registrations

For each registration received, assign a task to a support rep.

# Related Lists.

All standard Modules in CRM are related.

Ex: Accounts has Contacts, Potentials, Notes etc.

Related lists display all data associated with a Module in one place.

The screenshot displays a CRM interface for an account named 'Michael'. The main record shows details like 'Primary Owner', 'Industry', 'Employment', and 'Annual Revenue'. Below this are sections for 'Notes for this Account', 'Attachments', 'Zoho Projects', 'Potentials', and 'Contacts'. Overlaid on this are several related list panels:

- Contacts:** A table listing contacts associated with the account.

Edit	Delete	Contact Name	Email	Phone	Mobile	Fax
		Zohar Shapira	zohar@zohar.com			
		Jayesh Jayaraman				
		Yogee	yogee_sahu@zoho.com			
- Open Activities:** A table listing open activities.

Edit	Delete	Subject	Activity Type	Status	Due Date	Start Date/Time	End Date/Time	Owner Name	Modified Time
		Send Day in Touch email	Task	Not Started					
		Log a Call	Task	Not Started					
- Closed Activities:** A table listing closed activities.

Edit	Delete	Subject	Activity Type	Status
		mediamarketing Travel	Event	Completed
		TV yugol video	Event	Completed
- Products:** A section for products associated with the account.
- Quotes:** A table listing quotes.

Edit	Delete	Subject
		Test
		Test
- Sales Orders:** A table listing sales orders.

Edit	Delete	Subject	Status	Customer No.	Date Date	Invoice Date	Sales Commission
		Test	Created				\$0.00
		Test test	Created				\$0.00
		Test					\$0.00
		Test Sales		12345			
		Test Data					
- CheckList:** A table listing checklists.

View	Item	Status
	Go/Change Created	Not Approved
	Vendor GST Updated	Approved
- Sales Potential:** A table listing sales potential.

View	Item	Status
	Go/Change Created	Not Approved
	Vendor GST Updated	Approved

# Custom Related Lists.

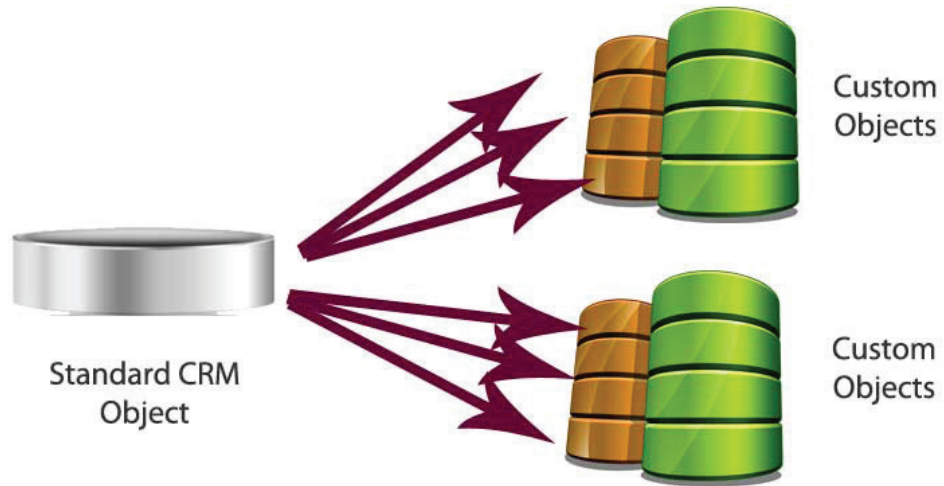
Custom objects – that collect data through other sources, are also related to standard objects [modules] in CRM.

Custom objects share a one to many relationship with the standard objects.

In the record summary page of any module, in addition to all details associated with that record by default, it is possible to display the custom object data for that record.

This extended record details that contains data collected through custom objects is called Custom Related Lists.

# Custom Objects - Relationships



# Exercise: Webminar Registration Details

In the contact details page, details of the webminar attended by the contact are also displayed.

The attendance details, collected by a custom object is the Custom Related List.

# Custom Portals - Need

A CRM account is shared within the organization and employees have access to the data.

In scenarios where CRM data needs to be shared customers or contacts, some authentication mechanism is needed for Data Security.

Data is sensitive and cannot be made public for enabling access to a large group outside the organization.

Customers cannot be asked to signup into the CRM account to access data.

# Custom Portals

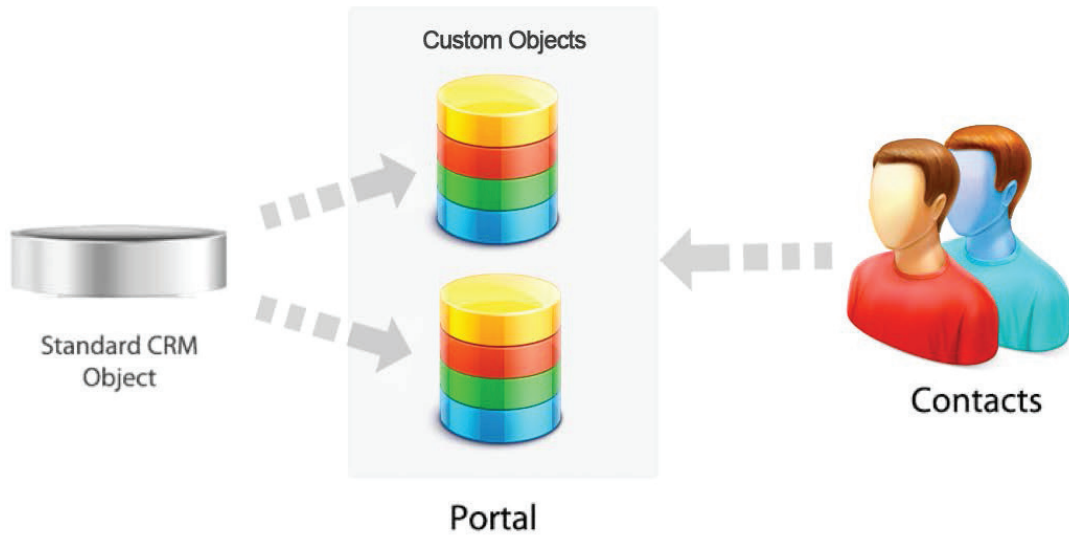
A custom portal is a great way for an organization to allow its customers to login into their dedicated internal system and access restricted data.

Instead of building their own authentication and security mechanisms, users can use Zoho Creator portals. Custom objects – that collect data through other sources, are also related to standard objects [modules] in CRM.

Users can sign up with their portal instead of sign in up with Zoho.

Users can login into their dedicated portal, access applications shared to them, submit data, and most importantly, view and edit only those records which they submitted.

# Custom Portals



# Signing Up for Custom Portals

Administrators can make signup mandatory for all users

Choose if the users should be moderated before being allowed to into the portal.

For contacts existing in CRM, admins can bypass moderation.

## Exercise : Customer Portal Example

Create a Portal

Control Access to the Portal

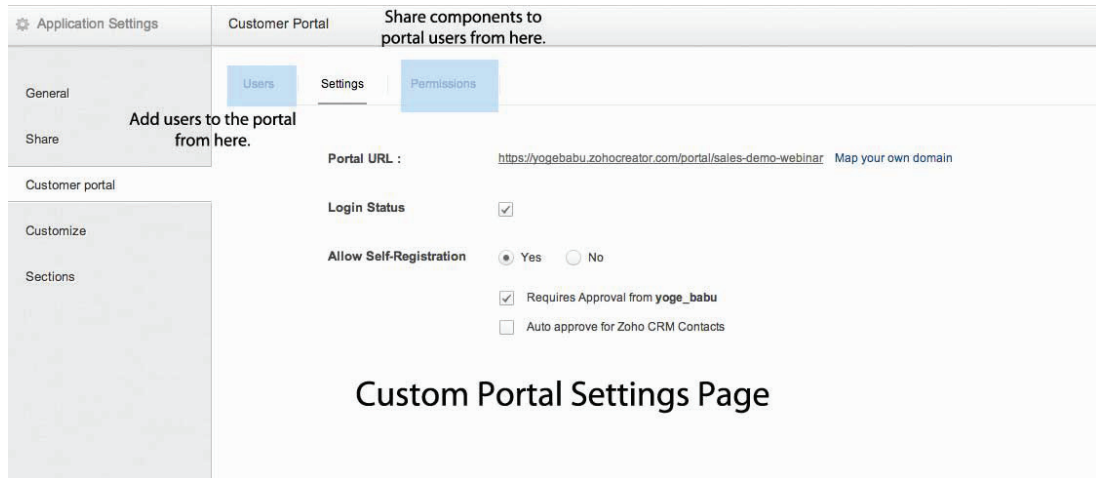
Create a User and login into the Portal

# Exercise:Customer Portal Example

Webinar Registration

Sign up into the portal

Obtain encrypted link to the webinar streaming.



The screenshot shows the 'Customer Portal' settings page in Zoho Creator. The page is divided into a left sidebar and a main content area. The sidebar contains 'Application Settings', 'Customer Portal', 'General', 'Share', 'Customer portal', 'Customize', and 'Sections'. The main content area has a header with 'Customer Portal' and 'Share components to portal users from here.' Below this are three tabs: 'Users', 'Settings', and 'Permissions'. The 'Settings' tab is active. The settings include: 'Portal URL' with the value 'https://yogebabu.zohocreator.com/portal/sales-demo-webinar' and a link to 'Map your own domain'; 'Login Status' with a checked checkbox; 'Allow Self-Registration' with radio buttons for 'Yes' (selected) and 'No'; and two checkboxes for approval: 'Requires Approval from yoge\_babu' (checked) and 'Auto approve for Zoho CRM Contacts' (unchecked). A large text overlay in the center of the page reads 'Custom Portal Settings Page'.

Application Settings Customer Portal Share components to portal users from here.

General Add users to the portal from here.

Share

Customer portal

Customize

Sections

Users Settings Permissions

Portal URL : <https://yogebabu.zohocreator.com/portal/sales-demo-webinar> Map your own domain

Login Status

Allow Self-Registration  Yes  No

Requires Approval from yoge\_babu

Auto approve for Zoho CRM Contacts

Custom Portal Settings Page

# Benefits of Custom Portals

1. Eliminates the need for every new customer or contact to sign up for a Zoho account and then be added to admin's account as a user.
2. Portal users can be allowed to access data associated only with their account.
3. Ability to synchronize contacts from/to Zoho CRM.
4. The portal can be customized to resemble the organization's website, thus giving the branding edge.
5. Users who sign up for the portal can be granted access immediately, or be made to await moderation by the administrator.
6. Contacts or customers already present in Zoho CRM can be exempted from the moderation procedure.

# CRM for Google Apps

---

## Session schedule



Zoho CRM + Google Apps



Functional integration



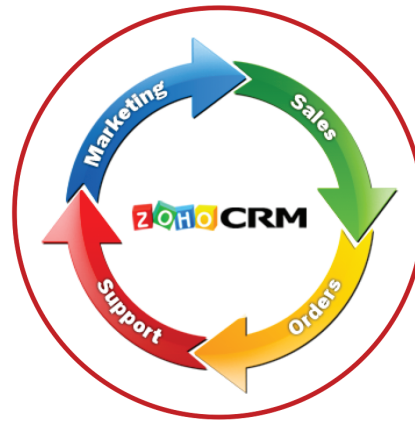
Data integration

# Zoho CRM & Google Apps



## Google Apps

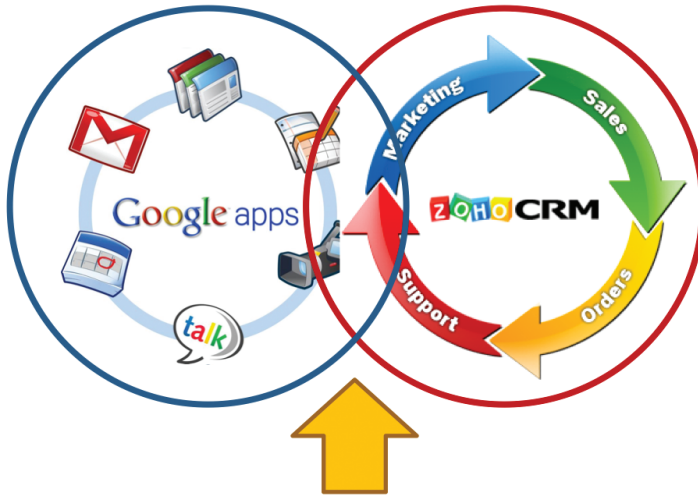
- messaging and collaboration suite
- popular and great platform



## Zoho CRM

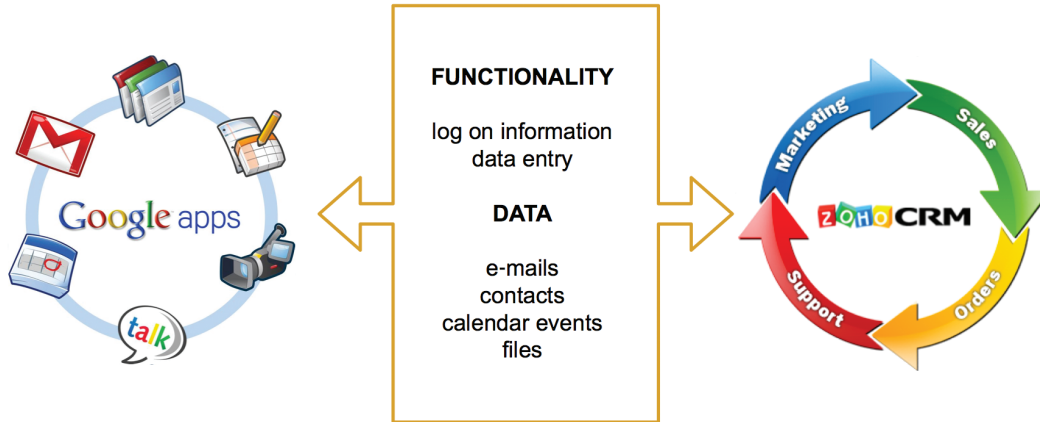
- great customer management tool
- handles complex data structure about sales and customer

Synergy



**Synergy:  
Teams and Customers all  
in one place**

# What is integrated?



# Functional integration

## Log on

Single user authentication

Single sign on

Add domain users

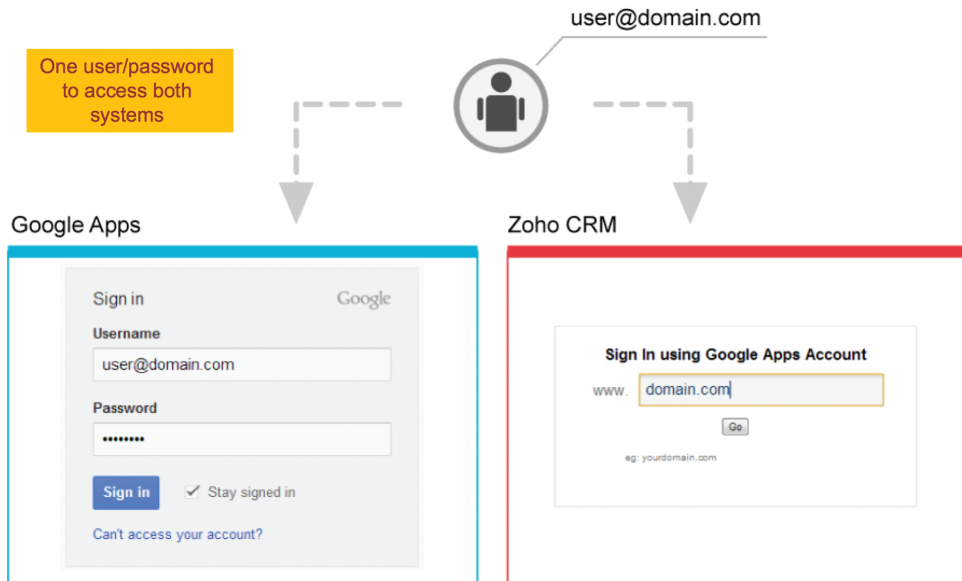
## Data entry

Create CRM entries from your Inbox

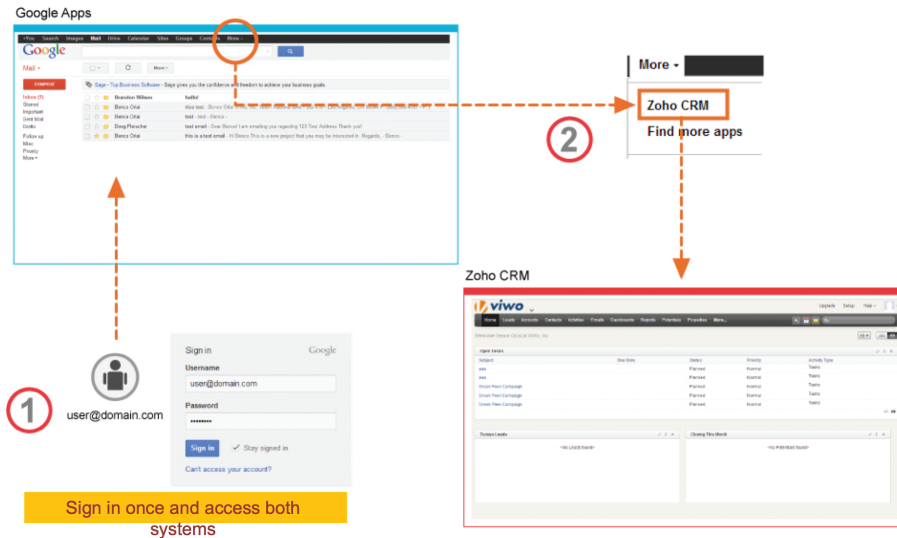
Send e-mails from CRM

Create Google Tasks from CRM

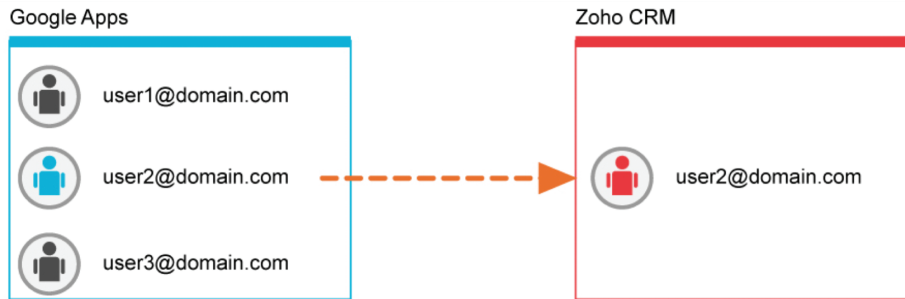
# Single user



# Single sign on



# Add domain users



Add Google Apps users as Zoho users with a click

## Add Users from Google Apps.

<input type="checkbox"/>	Name	Email
<input type="checkbox"/>	appscontactmanager	appscontactmanager@appscrm.com
<input type="checkbox"/>	bence	bence@appscrm.com
<input type="checkbox"/>	brandon	brandon@appscrm.com
<input type="checkbox"/>	crisantos	crisantos@appscrm.com

Add to Zoho CRM

# Working with POTENTIALS

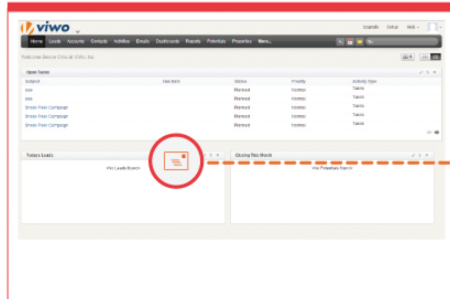


Switch to Zoho CRM and demo:

- show sign in options

# E-mail sending

Zoho CRM



Google Apps



E-mails sent from inside CRM will show up in Gmail's Sent folder

## Quick Actions

- Add a new potential
- Add a new task
- Add a new event
- Add a new call
- Send Mail

## Emails



Mass e-mailing bypasses the Google e-mail gateway and will not show up in 'Sent'!

# Create Task

## Zoho CRM

**Create Task**

Task Information

Subject: [text input]

Contact: [dropdown]

Account: [dropdown]

Status: Planned

Remind At: [calendar icon]

Campaign Info

Description: [text input]

Description Information

Task Owner: Bianca Ojia

Save Save and Export to Google Tasks Save & New Cancel

## Google Apps

**Tasks**

Google

Date	Name	Task ID	Status	Task
10/10/2011	Task 1	1001	Completed	Task 1
10/10/2011	Task 2	1002	In Progress	Task 2
10/10/2011	Task 3	1003	Not Started	Task 3
10/10/2011	Task 4	1004	Completed	Task 4
10/10/2011	Task 5	1005	In Progress	Task 5
10/10/2011	Task 6	1006	Not Started	Task 6
10/10/2011	Task 7	1007	Completed	Task 7
10/10/2011	Task 8	1008	In Progress	Task 8
10/10/2011	Task 9	1009	Not Started	Task 9
10/10/2011	Task 10	1010	Completed	Task 10

create a copy

When creating a Task it can be exported in the same step

Save **Save and Export to Google Tasks** Save & New Cancel

Export to Google Tasks

Save Close

# Gmail Widget

Google Apps

**Your Inbox**

From: [Redacted]

From: [Redacted]

Zoho CRM - Affordable On-demand CRM

Contact Details

Zoho CRM

- Contact
- Potential
- Task
- Note

create

Google

Brandon Wilson

Contact Details

Create your first Potential

Potential Name \*

Account Name \*

Stage \*

Closing Date \*

Save Cancel

Create a Lead / Contact / Potential / Task / Note without leaving your Gmail Inbox

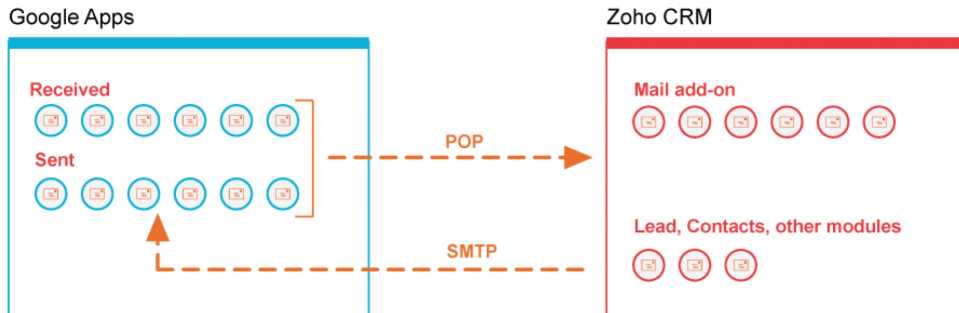
# Live demo



Switch to Zoho CRM and demo:

- Task export
- Gmail widget

# E-mail sync

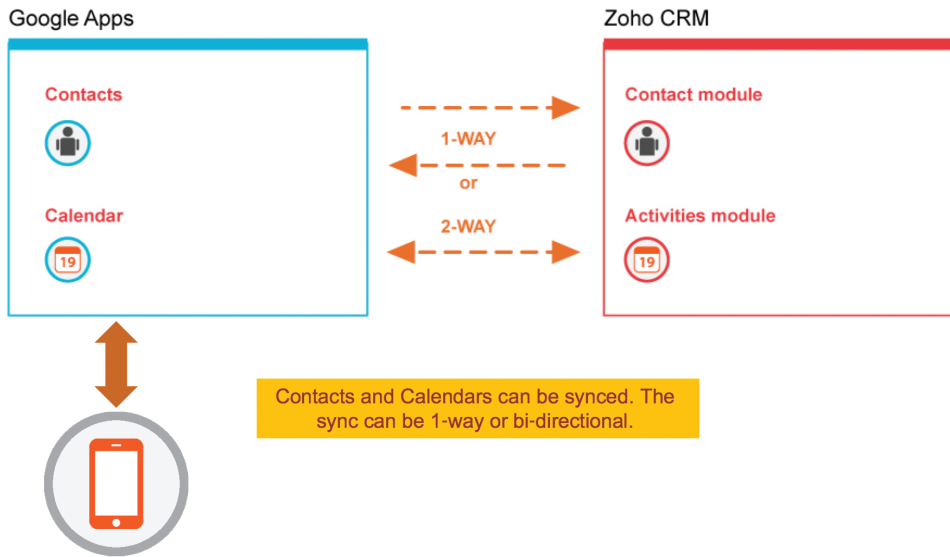


Sync both inbound and outbound e-mails



- requires Mail add-on (subscription)
- POP / SMTP need to be enabled in Google Apps

# Calendar / Contact sync



# Sync schedules

## Direction

- one way – copy over
- two way (full sync) – copy and update

## Frequency

- contacts: one time / daily / weekly / monthly
- calendar: initial sync + every 3 minutes

## Scope of data

- contacts: needs to be mapped, custom fields may be limited
- calendar: subject, date/time, reminder, venue, description, Invitees

## Google Apps target

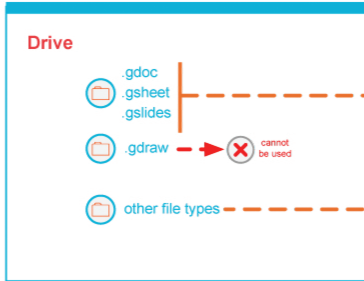
- main or designated (secondary) Contacts group / Calendar



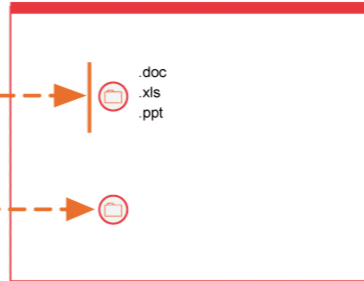
- improper sync settings could wipe out data in Google Apps
- some limitations apply in the scope of data synced

# Drive integration

## Google Apps



## Zoho CRM



convert & copy

copy

files from Google Drive can be brought over (copied and/or converted and copied) as Attachments on CRM

## Attachments

No records found

[Documents](#)

[Desktop](#)


[Zoho Docs](#)

[Google Drive](#)

# How to set up

## Domain integration

Your Marketplace apps


 **Zoho CRM**  
Licensed

[Go to Google Apps Marketplace](#)

the domain admin in Google Apps can add it from the Google Marketplace

! this needs to be done only once

## Sync setup / E-mail add on

 **Apps & Add-ons**  
Google Apps | Zoho Apps | Other Apps

a CRM user with admin privileges can set it up in Zoho CRM  
+  
each user has to log in and configure it in their own account

! this needs to be done for each user individually

# How to set up

## Configuring Zoho CRM for the Google Apps integration

The screenshot shows the Zoho CRM Setup page for Google Apps integration. The page is annotated with four numbered steps:

- 1**: Arrow pointing to the **Setup** tab in the top navigation bar.
- 2**: Arrow pointing to the **Apps & Add-ons** section in the left sidebar.
- 3**: Arrow pointing to the **Google Apps** tab in the top navigation bar.
- 4**: Arrow pointing to the **Tasks** tab in the top navigation bar.

Additional annotations include:

- domain users**: Points to the "domain users" option in the "Users" tab.
- from the E-mail tab!**: Points to the "from the E-mail tab!" option in the "Email" tab.
- calendar sync**: Points to the "calendar sync" option in the "Calendar" tab.
- contact sync**: Points to the "contact sync" option in the "Contacts" tab.
- needs no setup**: Points to the "needs no setup" option in the "Users" tab.
- Task export**: Points to the "Task export" option in the "Tasks" tab.

The "Add User" section shows a table of users:

Name	Email
appscontactmanager	appscontactmanager@appsCRM.com
bence	bence@appsCRM.com
brandon	brandon@appsCRM.com
crisantos	crisantos@appsCRM.com

Below the table is an "Add to Zoho CRM" button. A message on the right states: "You are in Enterprise Edition with 1 users licenses. You can add 0 more users. If you exceed this limit, users will be deactivated until you buy the additional licenses. Hence we suggest you to Manage your Subscription before adding users into Zoho CRM."

# Live demo



## Switch to Zoho CRM and demo:

- config options for the Google Apps integration on the Admin page

## Additional Info

More information on this subject on the Zoho website:

<http://www.zoho.com/crm/help/google-apps/>

# CRM Integration with Zoho Campaigns

# Introduction

Sending personalized emails is an important part of the sales follow-up process. By bringing in email marketing to your CRM efforts, you can take better sales decisions that help you close more deals. In this session you will learn how to integrate Zoho Campaigns with your Zoho CRM account for sending mass emails to leads and contacts in your CRM system.

## **Need for Email Marketing in Sales**

- You have leads coming in from various sources and you want to nurture them.
- You want to inform customers about updates in your product.
- You want to maintain a conversation with your customers about the industry trends.
- You want to invite all your customers to an event.

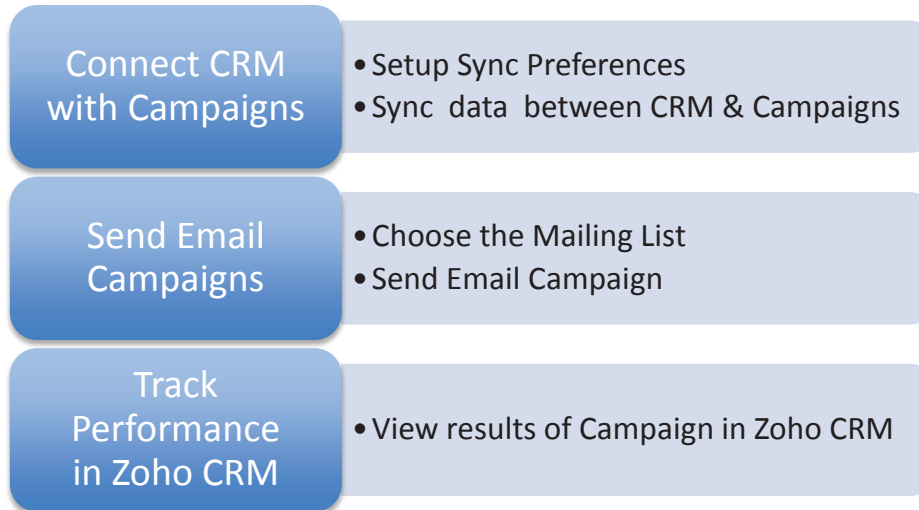
## **Advantages of Email Marketing**

- Simple
- Cost-Effective
- Measurable
- Reach Target Markets
- Saves Time

## **Why is this an important integration?**

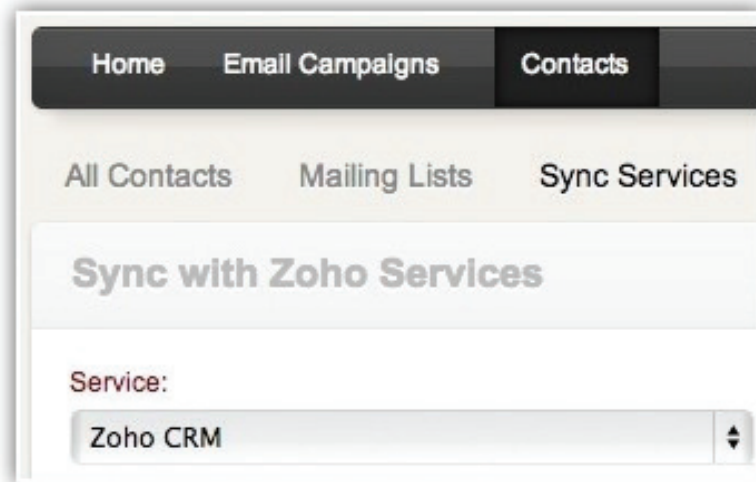
- To reach out to your leads, prospects and customers in your Zoho CRM account.
- To maintain up-to-date customer information between your email marketing software and CRM system.
- To view campaign results inside your CRM account and to be able to take better sales decisions.

# How does it work?



# Connect CRM & Campaigns

**Step 1:** Choose Zoho CRM from **Contacts** > **Sync Services**



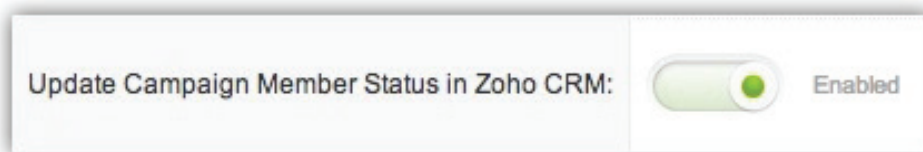


**Step 3:** Enable the **Create Campaign in Zoho CRM** option.



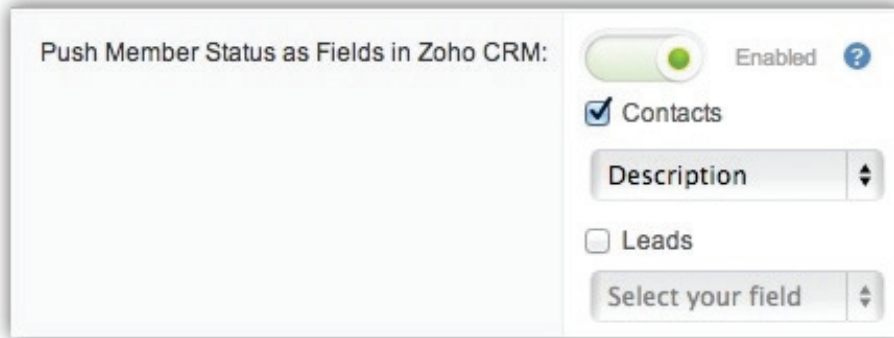
By enabling this option, every campaign you create in Zoho Campaigns will be added as a Campaign in Zoho CRM too.

**Step 4:** Enable the **Update Campaign Member Status in Zoho CRM** option.



Once enabled, this will show the campaign details as a related list in the campaign's detailed view page in Zoho CRM.

## Step 5: Enable Member Status for Contacts and Leads.



The screenshot shows a settings panel titled "Push Member Status as Fields in Zoho CRM:". On the right side, there is a toggle switch that is turned on, labeled "Enabled" with a question mark icon. Below this, there are two sections: "Contacts" and "Leads". The "Contacts" section has a checked checkbox and a dropdown menu currently showing "Description". The "Leads" section has an unchecked checkbox and a dropdown menu currently showing "Select your field".

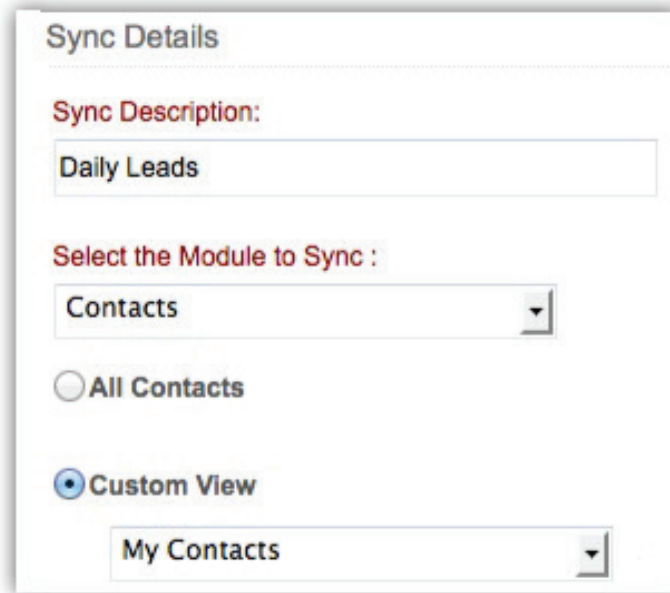
The status of every contact or lead that's part of a campaign created in Zoho Campaigns will be updated in Zoho CRM.

Any Text-Area field can be selected here.

By default, the Description field in the Contacts or Leads module will be updated with the Member Status. If any data is present in the Description Field, the Member Status will overwrite this data.

You have to create a text-area field in Zoho CRM first, and then choose that field in Zoho Campaigns.

## Step 6: Setup a New Sync



**Sync Details**

**Sync Description:**  
Daily Leads

**Select the Module to Sync :**  
Contacts

All Contacts

Custom View

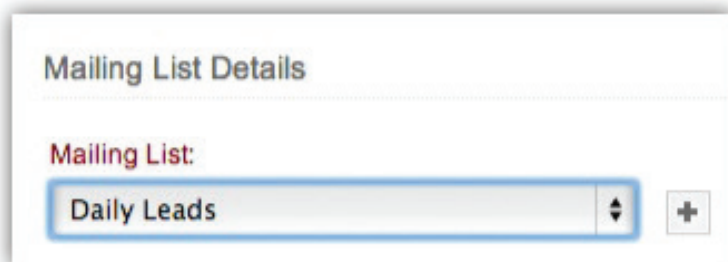
My Contacts

You can sync data from the Contacts or the Leads modules in Zoho CRM.

For the Contacts Module, you can choose to sync all contacts data or sync based on a custom view.

For the Leads Module, you can choose either all Open Leads or sync based on a custom view.

**Step 7:** Select the Mailing List.



Mailing List Details



Mailing List:

Daily Leads

All data synced from Zoho CRM will be added to this Mailing List and you can select this list while creating your email campaign.

You can select an existing mailing list or create a new list.

**Step 8:** Map the required fields.

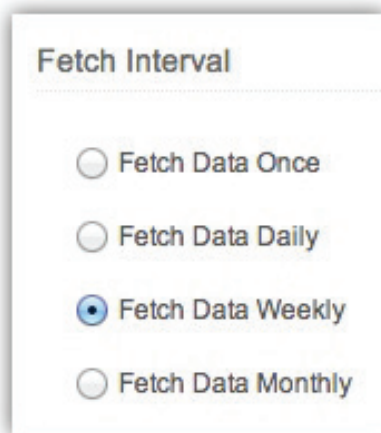
CRM Fields	Campaigns Fields
Email	Contact Email
Last Name	Last Name
First Name	First Name  

**Add New Field**

CRM Fields:

Campaigns Fields:  Existing Fields  New Field

**Step 9:** Select a sync frequency.



Fetch Interval

- Fetch Data Once
- Fetch Data Daily
- Fetch Data Weekly
- Fetch Data Monthly

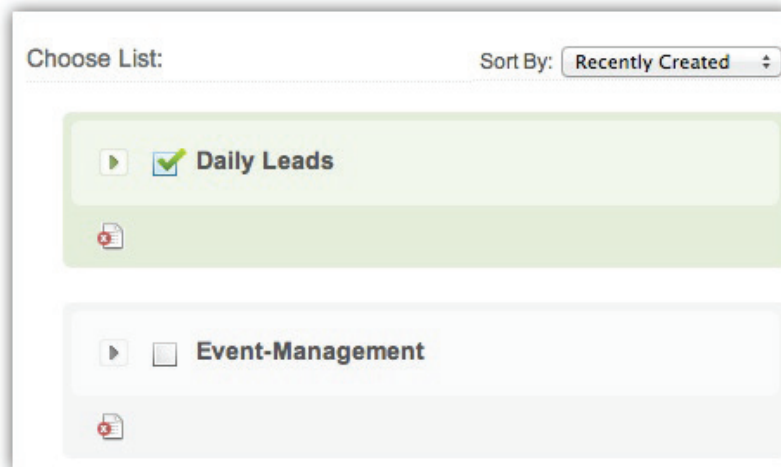
Tip: Choose a periodic sync option. New records or records that are modified will be updated at regular intervals.

**Step 10:** Select your data sync preferences.

Tip: It is a good practice to exclude the Email Opt-out contacts. This will make sure that recipients who are not interested to receive emails will not be a part of your email campaign.

# Sending Email Campaigns

Create an Email Campaign from **Email Campaigns > New Campaign**. Choose the Mailing List to which you have synced your Zoho CRM contacts while creating your Email Campaign.



You can then send the email campaign to your recipients.

# Track Performance in Zoho CRM

From the campaign's detailed view page in Zoho CRM, click **Show Report**.

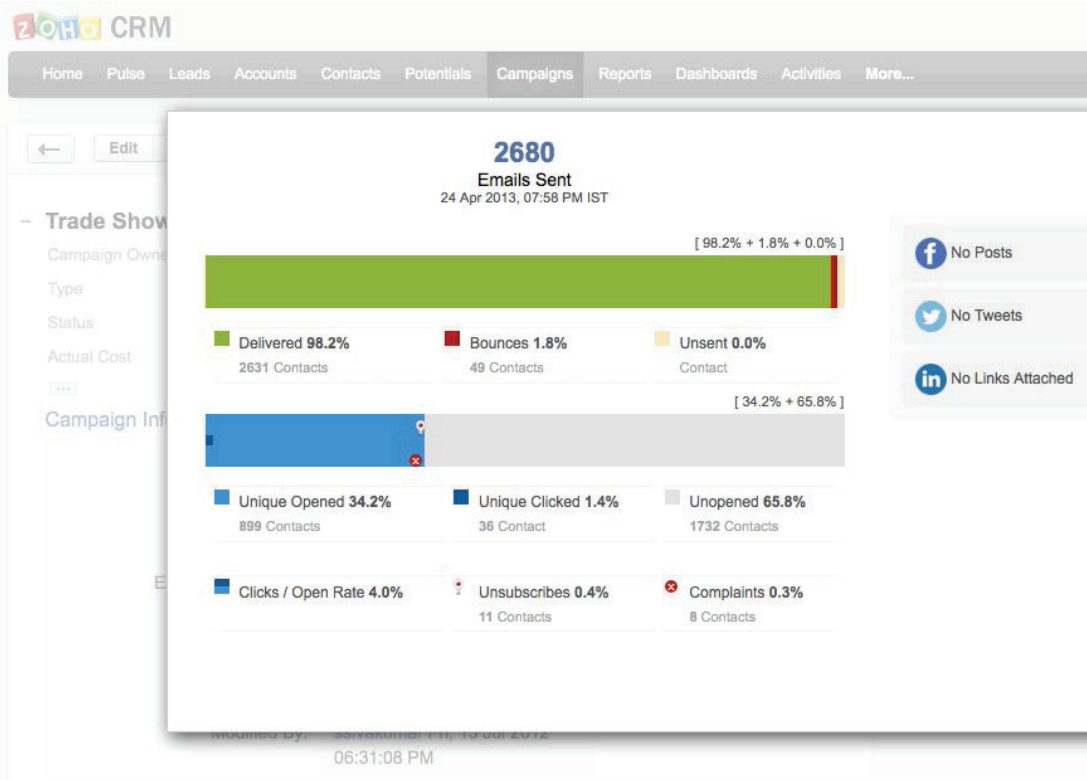


The screenshot shows a 'Contact Stats' widget with a list of metrics and a 'Show Report' button at the bottom right.

Metric	Percentage
Delivered	100%
Bounced	0%
Opened	60%
Clicked	36%
Opted Out	2%
Marked As Spam	0%

[Show Report](#)

A detailed report of your Email Campaign will be shown.



# Things to Remember

- You need to subscribe to the Professional or Enterprise Editions of Zoho CRM to use this integration.
- Multiple users in your Zoho Campaigns account can sync from the same CRM account. Remember to set permissions.
- You can sync data from the Contacts and Leads modules in Zoho CRM.
- You can initiate up to 5 syncs per day and up to 15 syncs per month.
- Only a user with Administrative privileges in Zoho CRM can generate the ZSC key.

# Additional Info

More information on this subject on the Zoho website:





<http://www.zoho.com/crm/help/zoho-campaigns/>

<http://www.zoho.com/campaigns/help/crm-integration.html>



# Extending CRM with Add-Ons

# Session Schedule

-  Overview of Zoho CRM Add-ons
-  Manage Mail Merge letters with Zoho Writer
-  Synchronize customer info between CRM and MS Outlook
-  Manage Inventory & Invoices using QuickBooks integration

# Overview

## add on

### Web definitions

addition: a component that is added to something to improve it; "the addition of a bathroom was a major improvement"; "the...  
[wordnetweb.princeton.edu/perl/webwn](http://wordnetweb.princeton.edu/perl/webwn)

## Types of Add-ons



### One-way Synchronization

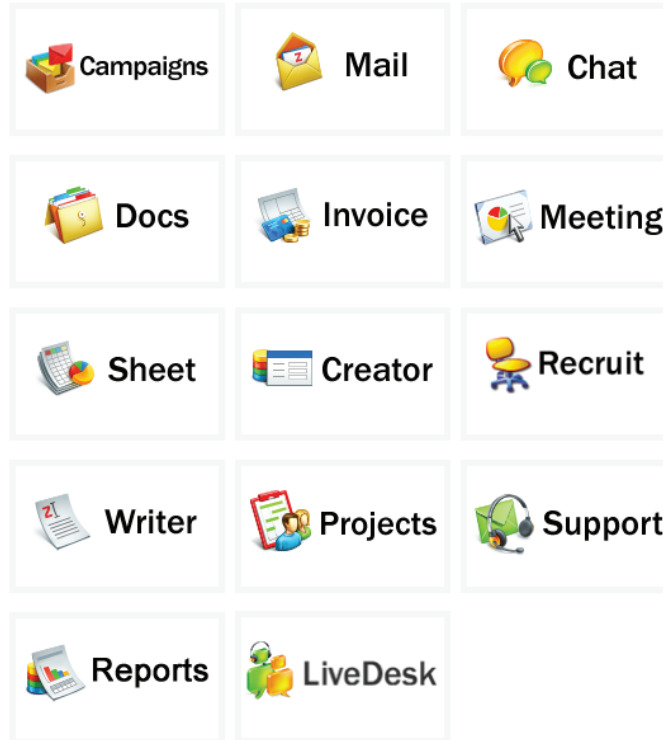
- Zoho CRM to Other App
- Other App to Zoho CRM



### Two-way Synchronization

- Between Zoho CRM and Other App
- Between Other App and Zoho CRM

# Zoho Add-ons for CRM



# 3<sup>rd</sup> Party Integrations



# Mail Merge with Zoho Writer

## What is mail merge?

Mail merge is the process of linking templates and customer data to generate personalized documents, such as forms, letters, address labels, envelopes etc.

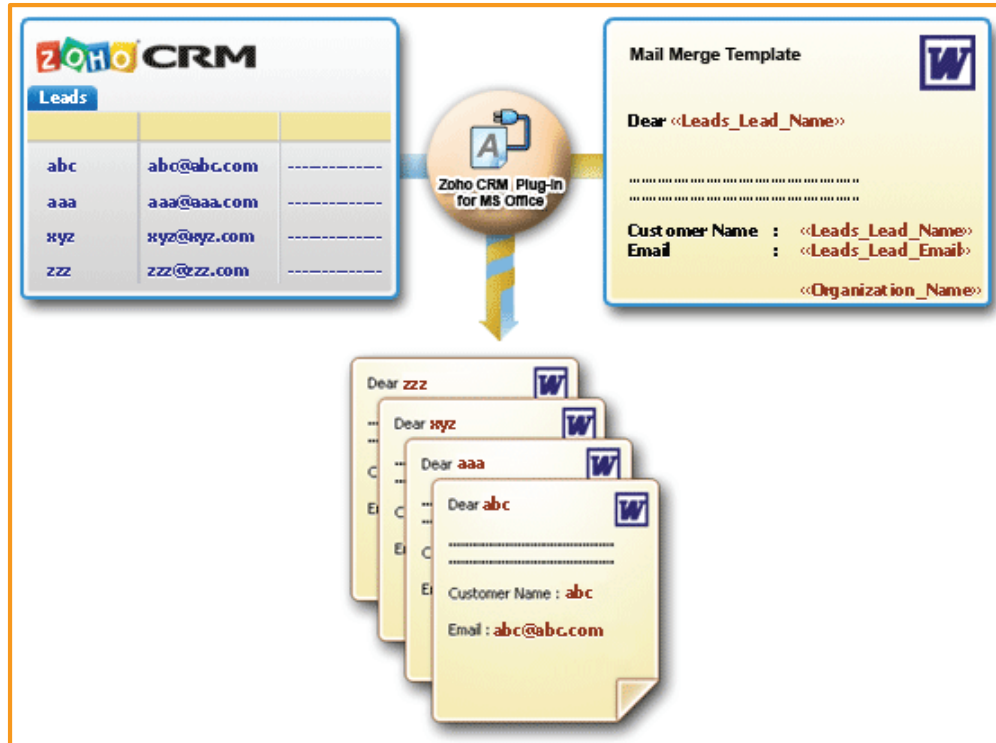
## Why is this an important integration?

- Save time by creating mail merge documents in bulk.
- Generate mail merge documents with up-to-date customer information.
- Import and share customized templates with Zoho CRM users.
- No need of any additional software to create mail merge document.

## How to manage mail merge docs?

- **Zoho Writer Add-on with CRM**
- Zoho CRM Plug-in for Microsoft Office

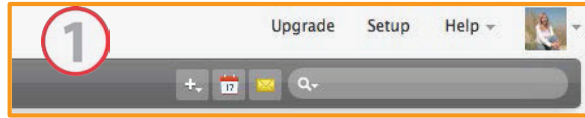
# How Does it work?



# How to create Mail Merge Documents?

- Activate license to users
- Create a mail merge template
- Store template in a folder
- Create a list of contacts or recipients
- Create mail merge document
- Print or email personalized document

# Activate License

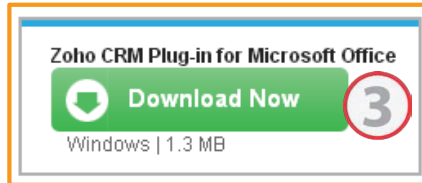


Subscribe for the Plug-in for MS Office (Administrator)

Full Name	Email Address	Role	Profile		Zoho CRM Plug-in for Microsoft Office
Patricia Boyle	patriciab@illum.com	CEO	Administrator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Hiyoshi	kylesinclair95@yahoo.com	Sales Manager	Standard	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Hanna Smith	hannas.smith432@gmail.com	Director of Sales	Standard	<input checked="" type="checkbox"/>	<input type="checkbox"/>

A screenshot of the 'Users List' table in Zoho CRM. A red circle with the number '2' is overlaid on the right side of the table.

Activate Plug-in to the Users (Administrator)

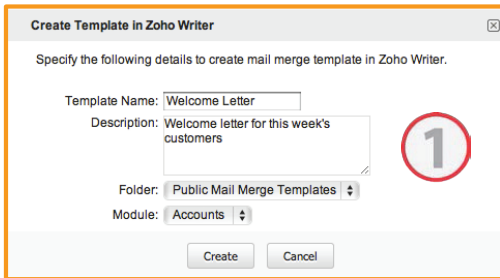


Install Plug-in for MS Office  
(required for MS Office User)

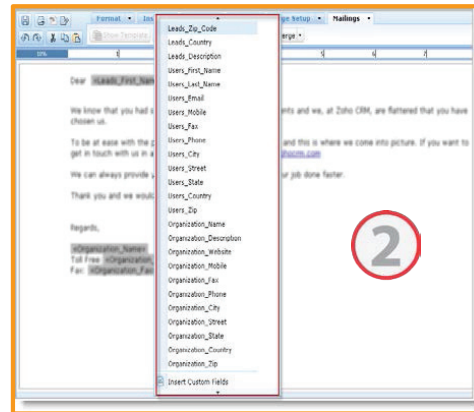


To create mail merge documents in Zoho Writer, user need not install any software.

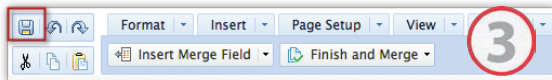
# Create a Template



Open Mail Merge Template link.



Draft your letter and insert mail merge fields at required places.



Save template in folder.

**Hint:** Click on **Setup >> Templates >> Mail Merge Templates >> Create Templates in Zoho Writer**

# Manage a List of Recipients

The image shows two overlapping screenshots from a CRM application. The bottom screenshot displays a list of contacts with columns for Lead Name, Company, and Email. A red circle with the number '2' highlights the 'More Actions' button. A dropdown menu is open, showing options: 'Mass Update', 'Change Owner', and 'Mail Merge'. The top screenshot shows the 'Create New View' dialog box. A red circle with the number '1' highlights the 'View Name' field, which contains the text 'Leads from USA'. Below it, the 'Specify Criteria' section shows a filter rule: 'Country' is 'USA'.

Lead Name	Company	Email
<input checked="" type="checkbox"/> Amy Gracelin	Apex Corp	amygracelin123@gmail.com
<input type="checkbox"/> Emma Clayton-Basset	Villa Margarita	e.clayton@samplecompany.com
<input type="checkbox"/> Hamid Ali Syed	Omas Missa	s.hamidali@samplecompany.com
<input type="checkbox"/> Munshi Abu Naim	Argentum	an.munshi@samplecompany.com
<input type="checkbox"/> Sazzad Islam	Hotel Punta	i.sazzad@samplecompany.com
<input checked="" type="checkbox"/> Elizabeth Robinson	Imperial	r.elizabeth@samplecompany.com
<input checked="" type="checkbox"/> Marc Badger	Ambassador	b.marc@samplecompany.com

**Create New View**

**View Information:**

\* View Name: Leads from USA

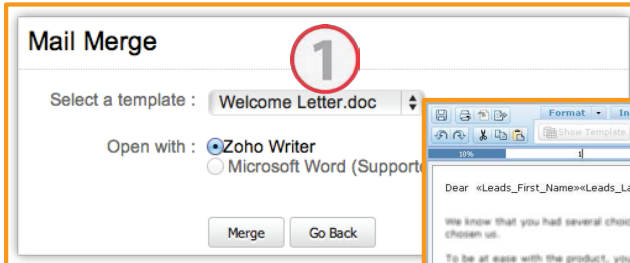
**Specify Criteria:**

Country is USA

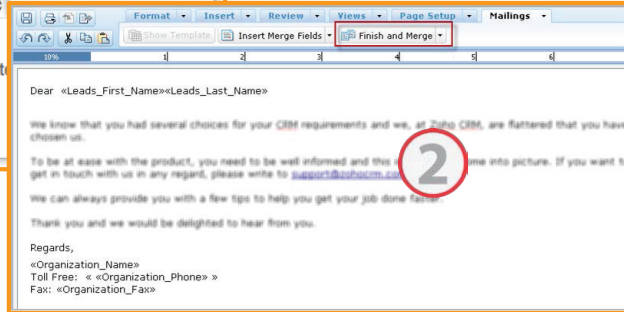
Create a custom view

Select a list of contacts

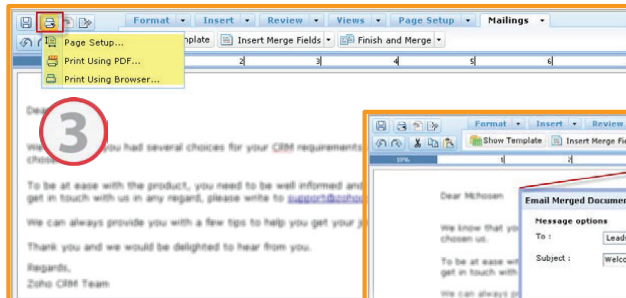
# Manage Mail Merge Documents



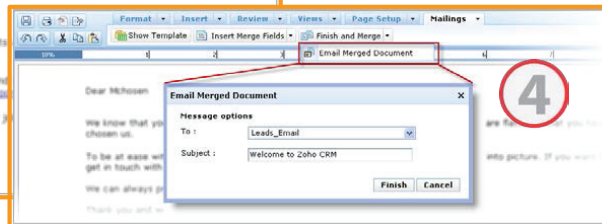
Select mail merge template.



Merge data with template.



Print document.



Email document.

# Things to Remember

- Microsoft Office users can also use Plug-in to manage mail merge documents.
- Users must have Plug-in for MS Office to create mail merge templates.
- The email limit for the organization is calculated based on the total number of confirmed and active users in the account.
- Zoho CRM Plug-in for MS Office is available only for Windows OS with 32 or 64-bit processors. You cannot use in other operating systems.
- Mail merge function is available only for leads, accounts, contacts, potentials, and Users modules.

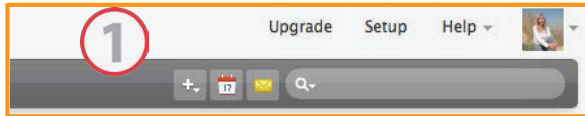
# Integration with MS Outlook

Zoho CRM Plug-in for Microsoft helps you synchronizing the contacts, tasks and events between Zoho CRM and Microsoft Outlook. Additionally, you can copy customer-specific emails (incoming/outgoing) from MS Outlook to Zoho CRM and create cases based on customer(s) email messages.

## What can you do with Zoho CRM Plug-in for MS Outlook?

- Synchronize contacts, calendar and tasks between Microsoft Outlook and Zoho CRM.
- Associate Outlook inbound and outbound emails with Leads, Contacts or Potentials in Zoho CRM.
- Modify email message and file attachments to the Lead or Contact in Zoho CRM without modifying the original message in Microsoft Outlook.
- Add email as a Case to Zoho CRM.
- Resolve conflicts while synchronizing contacts, calendar and tasks with Zoho CRM so that there is no duplication of customer data.

# How to Use?

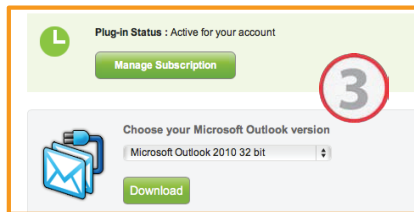


Subscribe for the plug-in (Administrator)

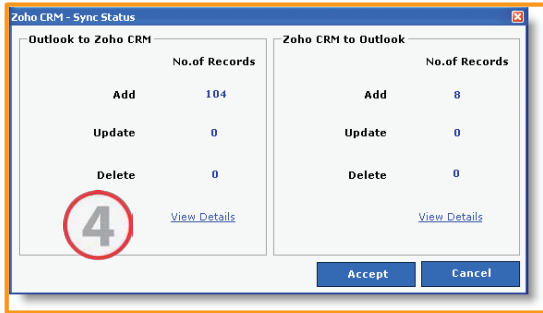
**Users List:**

Full Name	Email Address	User Status	Zoho CRM Plug-in for Microsoft Outlook
Patricia Boyle	patriciab@zillum.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Hiyoshi	kylesinclair95@yahoo.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Hanna Smith	hannas.smith432@gmail.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>

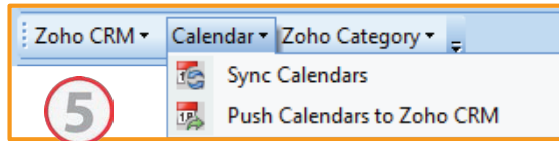
Activate plug-in for the Users (Administrator)



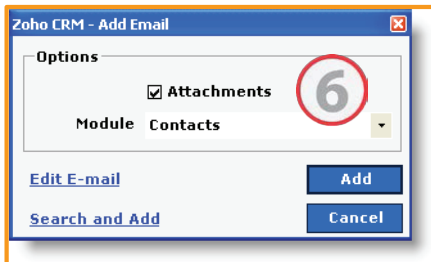
Download and Install plug-in (User)



Sync contacts between MS Outlook and CRM



Sync calendar between MS Outlook and CRM



Send Email to leads or contacts and copy to CRM

# Things to Remember

- Zoho CRM Plug-in for MS Outlook is available only for Windows OS with 32 or 64-bit processors. You cannot use in other operating systems.
- Contacts, Calendar, Tasks, in MS Outlook can be synchronized with your Online CRM Account, when you connect to the Internet.
- Use proper conflict resolution settings to overcome duplicate data and loss of data before synchronization.

# Zoho CRM for QuickBooks

## What is QuickBooks Integration?

Zoho CRM for QuickBooks helps you to synchronize customer data between Zoho CRM and QuickBooks. By transferring customer data, you can maintain complete and up-to-date customer information in your organization. Additionally, it will help you reduce the duplicate data entry and maintain consistency. With the QuickBooks Integration, you can import, export or synchronize data either manually or automatically.

## Why is this an important integration?

- Save time by creating mail merge documents in bulk.
- Generate mail merge documents with up-to-date customer information.
- Import and share customized templates with Zoho CRM users.
- No need of any additional software to create mail merge document.

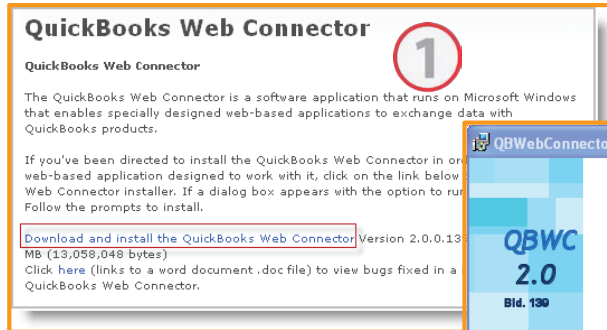
# What can you Do?

- Synchronize contacts and vendors between Zoho CRM and QuickBooks.
- Import & Export contacts, vendors, invoices, sales orders, products & quotes to/from Zoho CRM.
- Resolve conflicts while synchronizing data.
- Set up field mapping for Standard & Custom fields.
- View history of data transfer.

# How to Use?

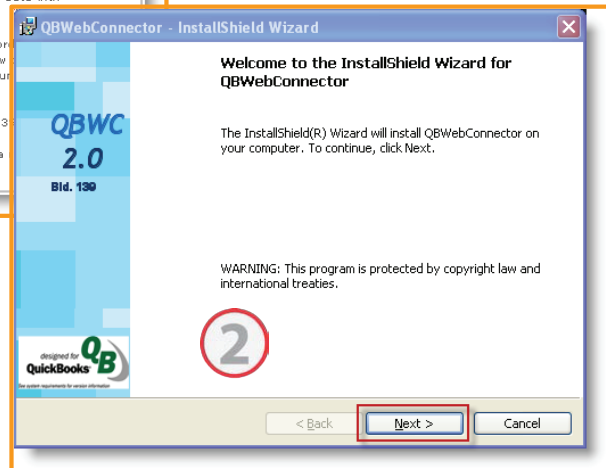
- Download QBWC
- Install QBWC
- Add Z CRM app to QBWC
  - Create QB company file in Z CRM
  - Browse QBC file in QBWC
  - Add QBC file to QBWC
- Match system time zone
- Map standard and custom fields
- Configure data transfer settings
- Transfer data: manual and automatic

# Install QuickBooks Web Connector



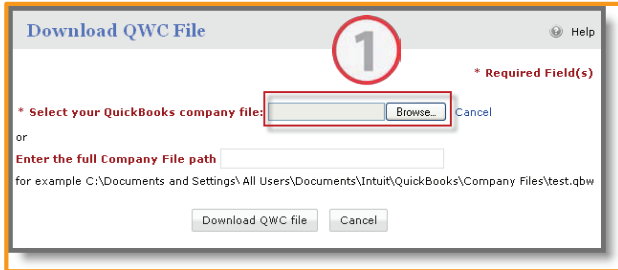
Download QuickBooks  
Web Connector

URL:  
<http://marketplace.intuit.com/webconnector>



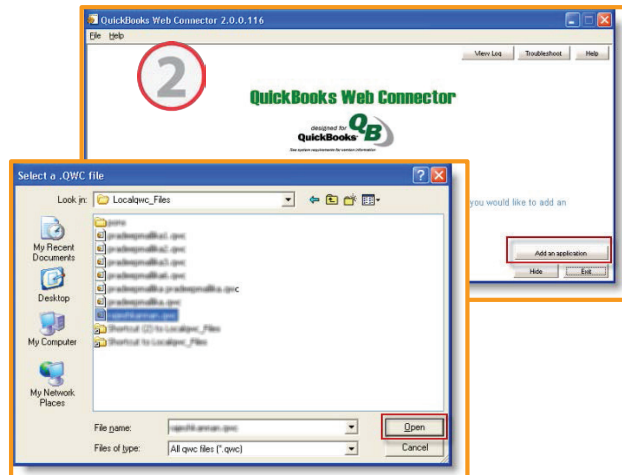
Install QuickBooks Web Connector

# Add CRM App to QBWC

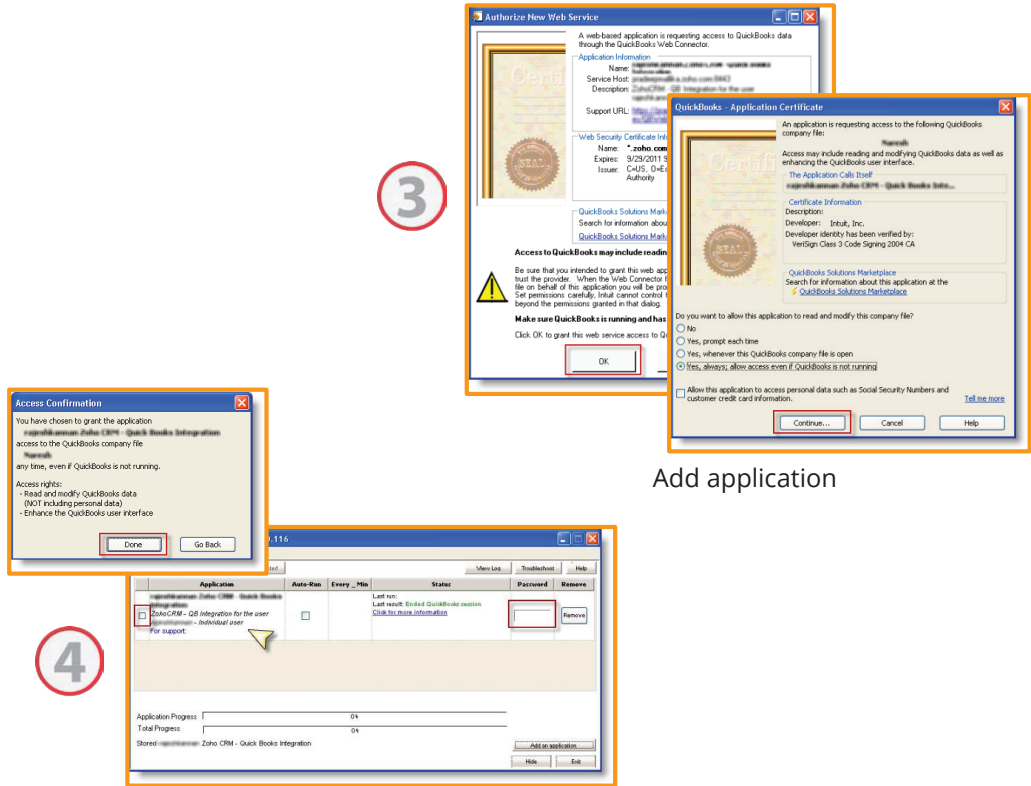


Select QB Company file in Zoho CRM

**Note:** The input you provide is a file with QBW extension and the output that you get after downloading is a file with QWC extension.

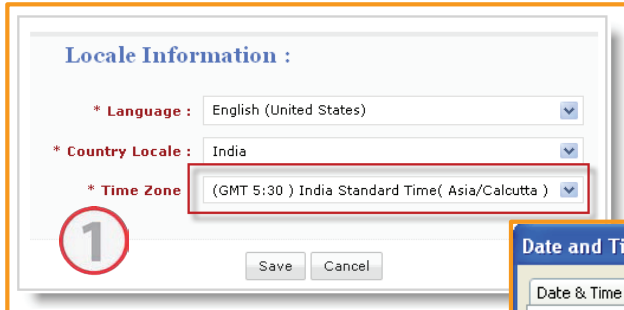


Browse QWC File in QuickBooks Web Connector



Zoho CRM application added to QuickBooks Web Connector

# Match Time Zone



**Locale Information :**

\* **Language :** English (United States)

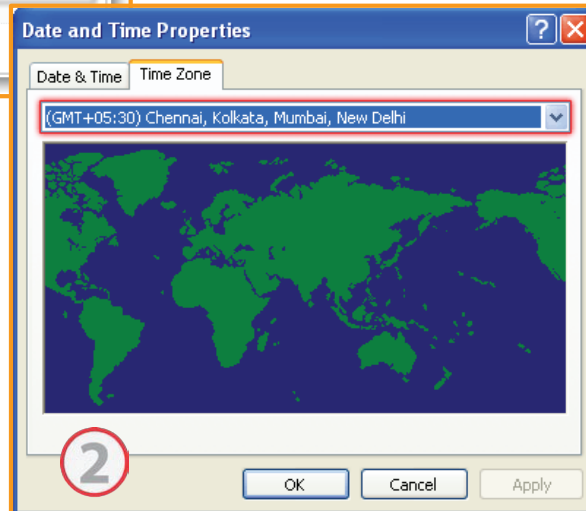
\* **Country Locale :** India

\* **Time Zone :** (GMT 5:30 ) India Standard Time( Asia/Calcutta )

1

Save Cancel

Set time zone in Zoho CRM account



**Date and Time Properties**

Date & Time Time Zone

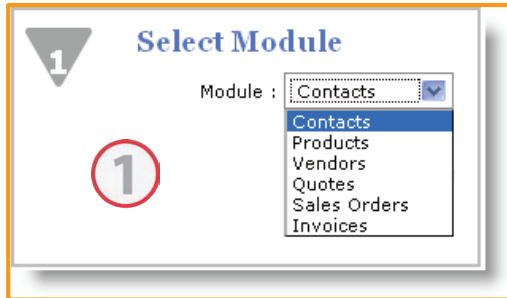
(GMT+05:30) Chennai, Kolkata, Mumbai, New Delhi

2

OK Cancel Apply

Set time zone in computer

# Map Fields

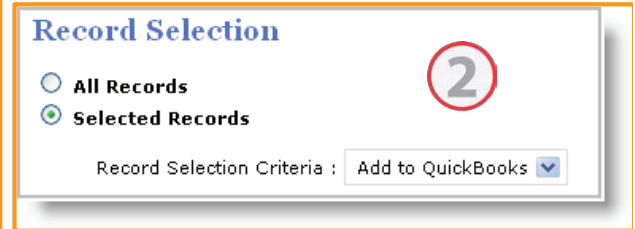


**Select Module**

Module : **Contacts**

- Contacts
- Products
- Vendors
- Quotes
- Sales Orders
- Invoices

Select a module



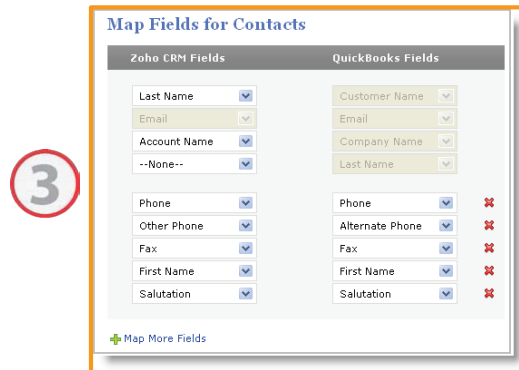
**Record Selection**

All Records

Selected Records

Record Selection Criteria : Add to QuickBooks

Choose data transfer option



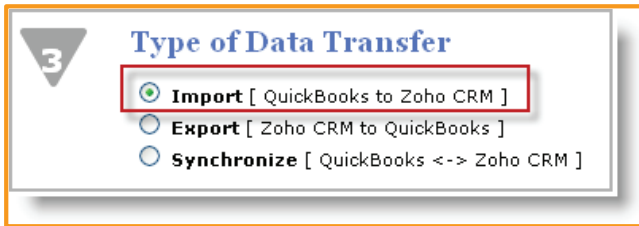
**Map Fields for Contacts**

Zoho CRM Fields	QuickBooks Fields
Last Name	Customer Name
Email	Email
Account Name	Company Name
--None--	Last Name
Phone	Phone
Other Phone	Alternate Phone
Fax	Fax
First Name	First Name
Salutation	Salutation

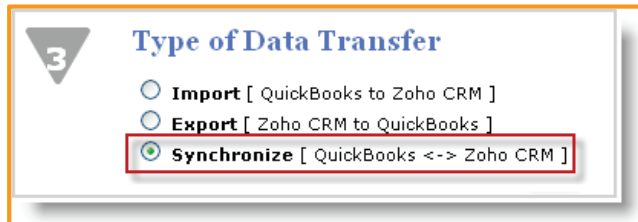
+ Map More Fields

Map fields for the Module

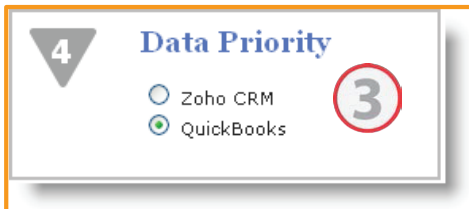
# Configure Data Transfer Settings



Select Type of Data Transfer (import/export)

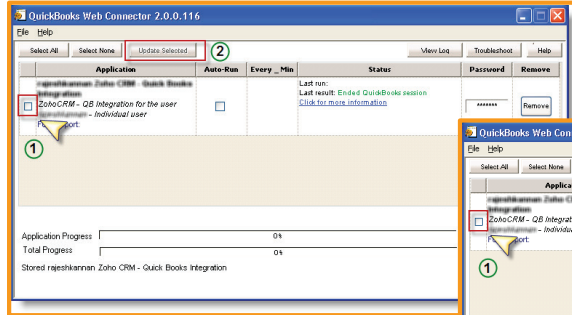


Select Type of Data Transfer as Synchronization

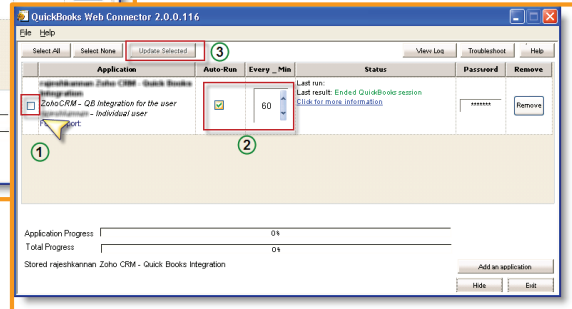


Set data priority  
Zoho CRM vs QuickBooks

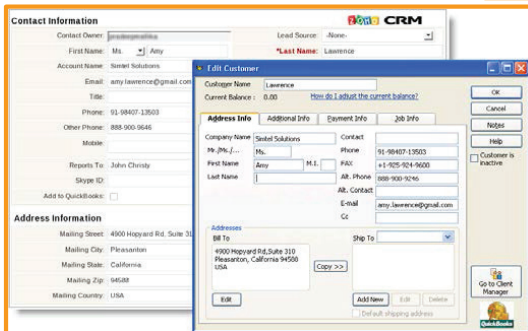
# Types of data transfer



Manual data transfer



Automatic data transfer



Data Synchronized between CRM and QuickBooks

# Things to Remember

- QuickBooks integration is available only for Contacts, Products, Quotes, Sales Orders, Invoices, and Vendors modules.
- Matching the time zone of your computer in which the QuickBooks software is installed and Zoho CRM account is mandatory to avoid any unexpected errors in data synchronization.
- Zoho CRM integration with QuickBooks is available only for these versions:
  - QuickBooks Premier 2008,2009, and 2010 (US Edition)
  - QuickBooks Simple Start 2008 and 2009 (US Edition)
  - QuickBooks Web Connector: Version 2.0.0.116 and above

# Online Resources

- <https://www.zoho.com/crm/help/zoho-writer/>
- <https://www.zoho.com/crm/help/outlook/index.html>
- <https://www.zoho.com/crm/help/quickbooks/>



# Migrating from other CRM system to Zoho

---

## Session schedule



Migration overview



Source data, target data



Importing

# Migration overview

## What needs to be migrated?

- core data (primary data tables)
- data relationships (e.g. Contact to Account connection)
- record users (Created by, Modified by, Owner)
- change history (e.g. Potential stage)

## Who can migrate data?

- system admin – in the backend
- user – import data in certain modules

# Migration overview

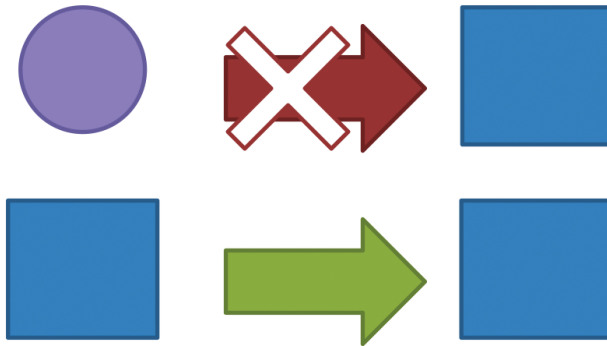
## Migration =

- + data extraction (get the data from the source)
- + data cleansing (dedupe, garbage, misplaced, missing)
- + data normalization (make its structure ready for import)
- + import
- + staging (single import or incremental?)
- + verification: statistical and functional

# Migration overview

## Functional differences

The imported data has to “make sense” in Zoho CRM, not just “dumped” in.



Example: the source system does not allow multiple contacts for an account, then contacts from the source data have to be grouped under the same account and then imported.

# A word on data quality...

Migration is an efficient way to introduce lots of junk data!

G.I.G.O.

vs.

Quality data IN



Quality data OUT

## Good data takes

- Good interface design
- Establish guidelines for data entry
- Clean data before import
- Store only relevant info
- Think "team"



# Source data

## When planning your data export, consider:

- data lockup: can you get all the data out?
- capabilities of the source system: manual extraction or a simple export?
- migration staging: single migration or staged?
- required import format: CSV
- primary and foreign keys: for the connected tables the data will need coordinated primary keys and foreign keys

# Source data

## Scenario 1: company name used as unique key

Accounts

Company	Address 1	Phone

1 N

Contacts

Company	First Name	Last Name	E-mail

The company name can be used to match records. The relationships are un-verified / un-enforced (missing, misspelled data) and can result in orphan records.

# Source data

## Scenario 2: primary key used as unique key

Accounts

ID	Company	Address 1	Phone

Contacts

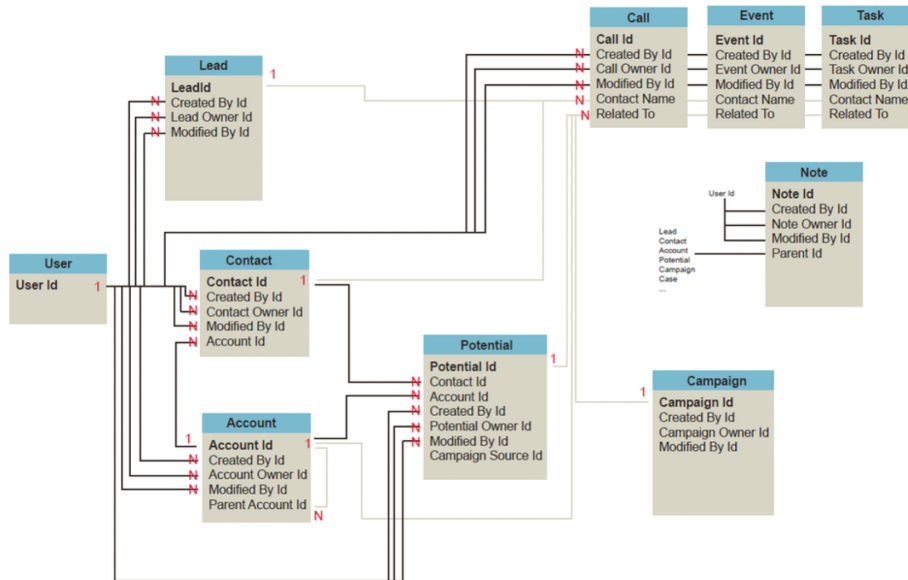
CompanySID	ID	First Name	Last Name	E-mail

1 N

Typically leads to better results but may require more work before import if the keys have to be manually created.

# Target data

## Relationship of the most important modules



# Target data

## Prepare data for import cleaning (optional)

- remove duplicates, junk
- fix misplaced data

## structuring

- all custom fields are present, right data type
- unique/foreign keys present

## create files

- all require fields present
- CSV format: field names, character coding
- file size limit 5MB

# Target data

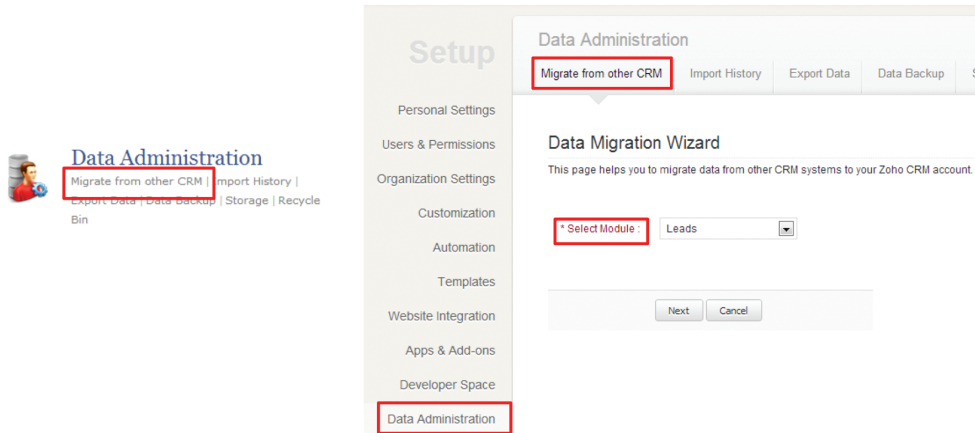
What can be imported?

Users → Campaigns → Leads → Accounts →  
Contacts → Potentials → Stage History →  
Competitors → Products → Cases → Solutions →  
Notes → Tasks → Events → Attachments.

This sequence must be followed to maintain table relationships.

# Importing

By administrator



The screenshot displays the Zoho CRM Setup interface. On the left, a sidebar lists various setup categories: Personal Settings, Users & Permissions, Organization Settings, Customization, Automation, Templates, Website Integration, Apps & Add-ons, Developer Space, and Data Administration. The 'Data Administration' category is highlighted with a red box. To the right of the sidebar, the 'Data Administration' section is expanded, showing a sub-menu with 'Migrate from other CRM' (highlighted with a red box), 'Import History', 'Export Data', and 'Data Backup'. Below this, the 'Data Migration Wizard' is visible, which includes a dropdown menu labeled '\* Select Module:' with 'Leads' selected. At the bottom of the wizard, there are 'Next' and 'Cancel' buttons.

# Importing

Specify source file

## Migrate Leads

Select a file to upload:

ZohoCRM-Mig...t-LEAD.csv  
[.csv file format only supported]

specify the source file

[Advanced Options](#)

**Character Encoding:**

ISO-8859-1

[Only for CSV and VCF]

character encoding

**Date and Time format in the import file:**

yyyy-MM-dd HH:mm:ss

2010-10-30 22:50:10

date format

**Send Notification Email:**



# Importing

## Source file field mapping

Lead Information		Zoho CRM Field: Import Field	Zoho CRM Field: Import Field	
* LeadId :	LeadId( Col: 1)	▼	Name : First Name( Col: 21)	▼
* LastName :	Last Name( Col: 22)	▼	Title : Title( Col: 23)	▼
Email :	Email( Col: 24)	▼	Phone : Phone( Col: 25)	▼
Fax :	Website( Col: 30)	▼	Mobile : Mobile( Col: 27)	▼
Website :	None	▼	Lead Status : Lead Status( Col: 3)	▼
Created Time :	Created Time( Col: 4)	▼	Modified Time : Modified Time( Col: 5)	▼
Skype ID :	Salutation( Col: 6)	▼	Email Opt Out : None	▼
Salutation :	None	▼	Secondary Email : Secondary Email( Col: 28)	▼
Twitter :	None	▼		

require fields MUST be mapped

unmapped data will not be imported

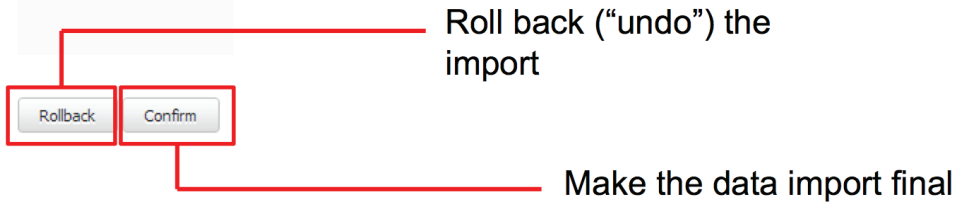
# Importing

## Verify data import

The import is put in an internal queue and completed soon after the request. The user received a notification when it is complete.

### List of Imports:

Import File Name
------------------



The data import can be rolled back within 30 days or manually finalized through confirmation. Please use caution around rollbacks as it may impact data integrity in a live system!

# Importing

## Unmapped fields warning

### Migrate Leads

#### Confirm Mapping:

Following Columns in your XLS/XLSX/CSV/VCF file are not mapped with any of the Zoho CRM field. The data in these columns will not be imported if you try to continue the importation. Click the Previous button to map these fields. If you wish to continue, click the Import button.

- Lead Source( Col: 2 )
- Lead Status( Col: 3 )
- Created Time( Col: 4 )
- Modified Time( Col: 5 )
- Salutation( Col: 6 )
- Last Activity Time( Col: 7 )
- Twitter( Col: 8 )

Prior to import the system will give a warning with the list of data fields present in the source file but NOT mapped (skipped). This warning helps avoid accidentally skipping data from the source file.

# Live demo



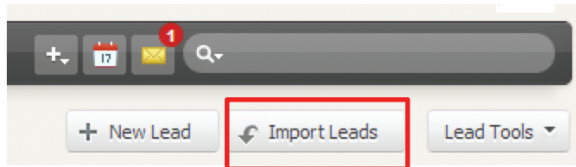
## Switch to Zoho CRM and demo:

- initiate an import by an admin

# User side import

## Users can also import data

Users can also initiate data import from the front end in many modules.



This import method is has different features than the migration initiated by an administrator in the system backend.

# User side import

## Unique features

Import My Leads  
 Import My Organization Leads

Assign ownership

Select a file to upload:

No file chosen

[only XLS, XLSX, CSV and VCF formats are supported]

Enable Manual Lead approval

**Duplicate Records:**

Skip  
 Overwrite  
 Clone

Specify behavior around existing data. It can be used to “update” fields in existing records

### Advanced Options

**Character Encoding:**

UTF-8 (Unicode) ▼

[Only for CSV and VCF]

**Workflow Task:**

None ▼

**Assign all imported Leads to this Lead Source:**

None ▼

# Live demo



## Switch to Zoho CRM and demo:

- initiate an import from the Leads module

## Additional Info

More information on this subject on the Zoho website:

<http://www.zoho.com/crm/help/migrate-data-from-salesforce.html>



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