Zoho CRM User Manual

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Getting Started

Welcome to Zoho CRM, an On-demand Customer Relationship Management software for managing your customer relations in a better way. Zoho CRM software helps streamlining your organization-wide sales, marketing, customer support, and inventory management functions in a single system.

Target Audience

- Sales Reps, Managers and Executives
- Lead Managers, Event Managers and Marketing Managers
- Customer Support Agents, Support Managers and Executives
- Accounting Managers and Stock Handlers
- Business Managers, Executives and Top Management
- CRM System Integrators

The Zoho CRM software comprises of the following business functions:

Sales Force Automation	Marketing Automation
- Lead Management - Account Management - Contact Management - Sales Management - Sales Forecasts - Sales Quotes Management - Sales Orders - Invoice Management	- Campaign Management - Lead Generation - Email Marketing
Customer Support & Service	Inventory Management
- Case Management - Solution Management	- Products Catalog - Price Books - Vendor Management (Procurement Process) - Purchase Orders
Analytics	Add - Ons
- Reports - Dashboards	- Outlook Plug-in - Web-to-Lead forms - Web-to-Case forms

Zoho CRM Modules

The following table describes various icons in Zoho CRM.

Module	Icon		Module	Icon
Task	⚙		Product	📦
Event	📋		Price Book	📖
Lead	🏃		Quote	ℹ
Account	🏢		Purchase Order	📄
Contact	👤		Sales Order	$
Potential	💰		Invoice	📑
Forecast	⭐		User Lookup	🔍
Campaign	📢		Calendar Day	1
Case	🗂		Calendar Week	7
Solution	🔧		Calendar Month	31

Campaign Management

Campaign management allows you to manage your entire marketing process by which marketing campaigns are planned, produced, distributed and analyzed. This includes planning the campaign, preparing your mailing list, executing the campaign and then analyzing the results.

You can use the **Campaigns** module for the following:

- Planning marketing activities and developing campaign hierarchies
- Outlining marketing campaign objectives
- Defining campaign success metrics
- Building and testing sample campaigns on a subset of customer data
- Storing and reusing content from previous marketing campaigns
- Measuring campaign effectiveness by linking directly to the leads and potentials
- Tracking customer inquiries related directly to campaigns.
- Tracking sales force closures related directly to campaigns.

You can perform the following operations in the **Campaigns** module:

- [Navigate campaigns](#)
- [Search campaigns](#)
- [Create list views](#)
- [Create campaigns](#)
- [Associate campaign with other records](#)
- [Change campaign owner](#)
- [Export campaigns](#)
- [Print campaign details](#)
- [View reports](#)
- [Delete campaigns](#)
- [Customize campaigns](#)

Navigating Campaigns

(Access Privilege: Read permission)

You can navigate the campaigns according to the status of the campaigns.

To navigate campaigns

1. Click the **Campaigns** tab.

2. In the *Campaigns Home* page, under the **Campaign List** section, select one of the views from **Select View** drop-down list to display the list of Campaigns according to the status of the Campaigns (For example, Contacted, Hot, Won, and others).
3. In the **Campaign List** section, click the <u>Start</u>, <u>Previous</u>, <u>Next</u>, or <u>End</u> links to access the respective list of Campaigns.

Searching Campaigns

(Access Privilege: Read permission)

You can search the campaigns alphabetically or filling the required information in Search box.

To search campaigns

1. Click the **Campaigns** tab.
2. In the *Campaigns Home* page, under *Campaign Search* section, do one of the following:
   o   Specify the search criteria in Search box and click the **Go** button. Or
   o   Select one of the alphabetical search links.

3. In the *Campaign List* page, a list of Campaigns is displayed as per search criteria.

(Access Privilege: Read/Write permissions)

Creating List Views

In the *Campaign List* you can create/modify/delete the custom views, sort columns in the list view (ascending/descending order), search the records available in the current list view. In addition, you can modify some of the columns in standard list views. By default, the following standard list views are available in the Campaigns module:

• All Campaigns
• All Active Campaigns
• My Active Campaigns

Note: User created list views are displayed under **User Created Views** category in **View** drop-down list.

To create custom views

1. Click the **Campaigns** tab.
2. In the *Campaigns Home* page, under *Campaign List* section, click the Create View link.

> Note: Under Campaign List section, some of the standard list
> views are displayed. You can only rearrange the order of columns
> and more columns.

3. In the *Create New View* page, do the following:
    o In the *View Information* section, specify name of the custom view in the **View Name** (mandatory) field. The custom view name appears in the View drop-down list. You can also set the custom view as a default list view by selecting the **Set as Default View** check box.
    o In the *Specify Criteria* section, specify the filter criteria. For more details, refer to the Specifying List View Criteria section.
    o In the *Choose Columns* section, select the columns to be displayed in the List View. For more details, refer to the Selecting List View Columns section.
    o In the *Accessibility Details* section, select the users to whom custom list view has to be enabled. For more details, refer to the Enabling View Access section.
4. Click **Save**. The custom list view is displayed in the View drop-down list.

Creating Campaigns

(Access Privilege: Read/Write permission)

In Zoho CRM, you can create campaigns by manually entering the data in *Campaign Details* form, quickly from the *Quick Create* section, or duplicating from the existing campaign information.

In the *Campaign: Edit* form, you need to specify the campaign-related information. The following table provides descriptions of the various fields in the form.

> Note: Some of the standard fields listed below may not be visible/editable depending on
> your organization business process and field-level security settings. In case your organization
> added/modified fields, please contact your System Administrator for more details about usage of
> the other fields.

List of Standard Campaign-related Fields

Field Name	Description	Data Type
Campaign Owner	Specify the owner name of the campaign.	Lookup
Campaign Name*	Specify the name of the campaign.	Text box, alphanumeric (40)
Type	Select the type of the campaign.	Check box
Status	Select the status of the campaign.	Pick List
Start Date	Specify the date on which the campaign starts.	Date
End Date	Specify the date on which the campaign ends.	Date
Expected Revenue	Specify the revenue expected after launching the campaign.	Currency
Actual Cost	Specify the actual amount spent on the campaign.	Currency
Budgeted Cost	Specify the planned amount to be spent on the campaign.	Currency
Expected Response	Specify the campaign turnout percentage.	Percent
Number sent	Specify the number of leads/contacts to whom the campaign details has been sent.	Integer
Description	Specify additional details about the campaign.	Text area (32KB)

To create campaigns individually

1. Click the New Campaign link.
2. In the *Campaign:* page, specify the campaign-related information.

   > **Note**: The **Campaign Name** is a mandatory field. Refer to the List of Standard Campaign-related Fields section for more details.

3. Click **Save**. Campaign details are displayed in *Campaign: <Campaign Name>* page where you can perform the additional operations. Refer to the Associating Campaigns with Other Records section for more details.

To create campaigns instantly

1. Click the **Campaigns** tab.
2. In the **Quick Create** (left hand-side bar) section, specify the campaign details, such as Campaign Name, Status, Start Date, End Date, and Expected Revenue.
3. Click **Save**. Campaign details are displayed in *Campaigns Home* page, where you can update the additional details.

To create campaigns from the existing campaign

1. Click the **Campaigns** tab.
2. In the *Campaign List* view page, select the Campaign to be duplicated.
3. In the *Campaign: <Campaign Name>* page, click the **Clone** button.
4. In the *Edit: <Campaign Name>* page, modify some of the Campaign details.
5. Click **Save**. Campaign details are displayed in the *Campaign: <Campaign Name>* page where you can perform the additional operations.

Associating Campaigns with Other Records

(Access Privilege: Read/Write permission)

After creating Campaigns, you may need to associate Campaigns with other records, such as tasks, events, e-mails, products, attachments, and notes until the Campaign is reached to a certain stage where it can be converted to potential as per your organization's sales process.

To associate campaign with other records

1. In the *Campaign: <Campaign Name>* page, you can update the following details:
   o **Open Activities:** To add tasks and events.
   o **Closed Activities:** To display the closed tasks and events.
   o **Leads:** To display the leads generated through campaign.
   o **Potentials:** To display the potentials converted through campaign.
   o **Attachments & Notes:** To attach documents and notes to the Campaign

2. After updating the associated records, you can proceed to the next record.

Exporting Campaigns

(Access Privilege: Export permission)

Occasionally it is very useful to export the campaigns from the Zoho CRM system to Spreadsheet programs, such as Microsoft Excel, OpenOffice, and others for further data analysis.

To export campaigns to external sources

1. Click the **Campaigns** tab.
2. In the *Campaigns: Home* page under the *Campaign Tools* section, click the **Export All Campaigns** button.
3. In the *File Download* pop-up dialog, Click **Save** to save the Campaigns details in CSV/XLS file format.

Changing Campaign Owner

(Access Privilege: Read/Write permission)

When the campaign is in progress, occasionally it may be very useful to change the owner of some of the campaigns in a single step. You can change the owner of an individual campaign or a group of campaigns.

To change owner of campaigns individually

1. Click the **Campaigns** tab.
2. In the *Campaigns: Home* page, select the Campaign.
3. In the *Campaign: <Campaign Name>* page, click the **Edit** button.
4. In the *Campaign: <Campaign Name>* page, change the Campaign owner from the **Campaign Owner** lookup field.
5. Click **Save**.

To change campaigns owner in bulk

1. Click the **Campaigns** tab.
2. In the *Campaigns: Home* page, go to the **Campaign List** section and select the check boxes corresponding to the Campaigns. You can also select all the Campaigns.
3. Click the **Change Owner** button.

4. In the *Campaigns: Change Owner* page, select the user from the **Select New Owner** pick
    list and click the **Update Owner** button to change the owner of the Campaigns
    permanently.

⚠️**Warning:** Campaigns ownership will be changed to another
user, irrespective of its existing owner. Use this operation carefully,
otherwise campaigns belonging to different users will be changed
to new user. To overcome this problem, first you may search the
campaigns with a required owner name then change the owner in
bulk.

Printing Campaign Details

(Access Privilege: Read permission)

You can view the campaign details in printable form and print them using browser's Print
function.

To print campaign details

1. Click the **Campaigns** tab.
2. In the *Campaigns: Home* page, go to the **Campaign List** section and select the required
    Campaign.
3. In the *Campaign: <Campaign Name>* page click the <u>Printable View</u> button.
4. In the *Campaign: <Campaign Name>,* page, click the **Print Page** button to print the
    document.

Viewing Reports

(Access Privilege: Read permission)

You can directly access some of the standard reports pertaining to campaigns from the *Campaign
Reports* section. By default, the following reports are displayed under Campaigns module:

*   Campaigns Revenue Report
*   Campaign Leads

To view campaign report

1. Click the **Campaigns** tab.
2. In the *Campaigns: Home* page, go to the **Campaign Reports** section.
3. Click the required Report link. The Report is displayed in Reports page, which can be further customized as per your requirements.

Refer to <u>Working with Reports</u> for more details about customizing the campaign reports.

Deleting Campaigns

(Access Privilege: Read/Write/Delete permission)

Occasionally you may need to remove some of the unnecessary Campaigns from the Zoho CRM system for a better user experience. You may consider removing Campaigns that are not useful for future reference.

Note: The deleted campaigns are temporarily stored in Recycle Bin. If required you can restore the deleted campaigns again. However, if you delete campaigns from Recycle Bin, you cannot restore again.

To delete campaigns individually

1. Click the **Campaigns** tab.
2. In the *Campaigns: Home* page, select the Campaign.
3. In the *Campaign: <Campaign Name>* page, click the **Delete** button.
4. In the *Confirmation* dialog, click **OK** to remove the Campaign permanently.

To delete campaigns in bulk

1. Click the **Campaigns** tab.
2. In the *Campaigns: Home* page, go to the *Campaign List* section and select the check boxes corresponding to the Campaigns to be removed.
3. Click the **Delete** button.
4. In the *Confirmation* dialog, click **OK** to remove the selected Campaigns permanently.

Customizing Campaigns

(Access Privilege: Customize ZohoCRM.com permission)

Customization of the campaigns module includes, renaming the tab name, modifying the pick list values in standard fields, adding new custom fields, modifying campaign page layout, and show/hide the related list views according to your Campaign management process requirements.

Working with Leads

Introduction

Businesses consider Lead management as one of the important activities in their organization-wide sales & marketing process. Leads are raw details about individuals or representatives of organizations collected from trade shows, seminars, advertisements, purchasing from external sources, and other marketing campaigns. These are used to qualify a particular individual or organization to next stage of your sales process so that you can sell your products/services to them in future. Sometimes leads may not be interested to purchase specific products/services, but may be useful as referral to sell other products in future.

The terminology related to lead management may differ across the industries, but the basic process is approximately same. You can use *Leads* module, if you have a well-defined lead management process in your organization. In Zoho CRM, lead contains a combination of company, person, and business opportunely (potential) details. You can use Zoho CRM for managing both **Business to Business** (B2B) and **Business to Consumer** (B2C) scenarios. In B2B, scenario company name can be made mandatory where as in B2C company name can be optional. For more details on customizing Zoho CRM for B2C, refer to [Zoho CRM for B2C](#) tutorial.

Typical Lead Management Process

1. Customize lead related fields in lead page according to your organization Sales & Marketing process (You may use the existing fields, disable some of the standard fields, or add new custom fields).
2. Setup **lead generation process** by filling the lead form, importing lead data from external sources, or capturing leads directly from your Web site
3. Assign leads to the correct sales persons/partners using the Lead Assignment rules.
4. Qualify the leads as potentials by following-up until the lead reached to a certain stage. Afterwards convert lead to potential. While converting leads to potentials, accounts and contacts are created automatically.
5. After converting leads to potentials follow-up further in **Potentials** module until the deal is either won or lost. All the converted leads status is changed to "Converted", which can be used for future reference.

Sales Funnel Diagram

✎**Note:**

- Standard fields in the Leads module are applicable to most of the industries. If your organization requires additional fields, your System Administrator can add them using product customization module.
- For creating leads, you must add the **Company Name** and **Last Name** of the lead. In Zoho CRM, lead information is a combination of company as well as the person's contact information.

The Leads home page contains,

- Leads list View
- Page Navigation
- Leads Reports
- Dashboard
- Lead Tools, such as Import, Export, Mass Delete, and Mass Transfer
- Alphabetical Search
- Custom Views

You can perform the following operations in *Leads* module:

- Navigate leads
- Search leads (Alphabetical or Advanced search options)
- Manage custom views

- [Create leads](#) (form filling, quick create, or duplicate options)
- [Import leads](#) (from external sources)
- [Associate lead with other records](#)
- [Send mass e-mail to the leads](#)
- [Merge duplicate leads](#)
- [Export leads](#) (to spreadsheet programs)
- [Convert lead to other sales records](#) (account, contact, and potential)
- [Map lead conversion fields](#)
- [Change lead status](#) (individually or in bulk)
- [Change lead owner](#) (individually or in bulk)
- [View Reports & Dashboards](#)
- [Print lead details](#)
- [Delete leads](#) (individually or in bulk)
- [Customize leads](#)
- [Set up Lead Assignment Rules](#)
- [Capture Leads from Web site](#)
- [Approve Web-to-Leads](#)

Navigating Leads

(Access Privilege: Read access)

You can navigate the leads according to the status of the leads.

To navigate leads

1. Click the **Leads** tab.
2. In the *Leads Home* page, under the **Lead List** section, select one of the views from **Select View** drop-down list to display the list of leads according to the status of the leads (For example, Contacted, Hot, Won, and others).
3. In the **Lead List** section, click the Start, Previous, Next, or End links to access the respective list of leads.

Searching Leads

(Access Privilege: Read permission)

You can search the leads alphabetically or filling the required information in Search box.

To search leads

1. Click the **Leads** tab.
2. In the *Leads Home* page, under *Lead Search* section, do one of the following:
    3.
    o Specify the search criteria in Search box and click the **Go** button. Or
    o Select one of the alphabetical search links.

3. In the *Lead List* page, a list of leads is displayed as per search criteria.

Creating Custom List Views

(Access Privilege: Read/Write permission)

In the *Lead List* view, you can create/modify/delete the custom views, sort columns in the list view (ascending/descending order), search the records available in the current list view. In addition, you can modify some of the columns in standard list views. By default, the following standard list views are available in the Leads module:

- Standard Views
    o All Open Leads
    o My Leads
    o Today's Leads
    o Converted Leads
    o My Converted Leads
- Recent Views
    o Recently Created Leads
    o Recently Modified Leads
    o Recently Viewed Leads

Note: User created list views are displayed under **User Created Views** category in **View** drop-down list.

To create custom views

1. Click the **Leads** tab.
2. In the *Leads Home* page, under *Lead List* section, click the Create View link.

    Note: Under the Lead List section, some of the standard list

views are displayed. You can only rearrange the order of columns and more columns.

3. In the *Create New View* page, do the following:
    o   In the *View Information* section, specify name of the custom view in the **View Name** (mandatory) field. The custom view name appears in the View drop-down list. You can also set the custom view as a default list view by selecting the **Set as Default View** check box.
    o   In the *Specify Criteria* section, specify the filter criteria. For more details, refer to the [Specifying List View Criteria](#) section.
    o   In the *Choose Columns* section, select the columns to be displayed in the List View. For more details, refer to the [Selecting List View Columns](#) section.
    o   In the *Accessibility Details* section, select the users to whom custom list view has to be enabled. For more details, refer to the [Enabling View Access](#) section.
4. Click **Save**. The custom list view is displayed in the View drop-down list.

Creating Leads

(Access Privilege: Write permission)

In Zoho CRM system, you can create leads by:

*   Entering data manually into lead details form
*   Importing leads from external sources
*   Capture leads from Web site through Web-to-Lead form

Note: Some of the standard fields listed below may not be visible/editable depending on your organization business process and field-level security settings. In case your organization added/modified fields, please contact your System Administrator for more details about usage of the other fields.

List of Standard Lead-related Fields

In the *Lead: Edit* form, you need to specify the lead-related information. The following table provides descriptions of the various standard fields in the form.

Field Name	Description	Data Type
Salutation	Select the salutation from the drop-down list.	Pick list
First Name	Specify the first name of the lead.	Text box, Alphanumeric (40)

Last Name*	Specify the last name of the lead. This field is a mandatory.	Text box, Alphanumeric (80)
Company*	Specify the name of the company where the lead is working. This field is a mandatory.	Text box, Alphanumeric (100)
Designation	Specify the designation of the lead.	Text box, Alphanumeric (50)
Lead Source	Select the source of the lead, that is, from where the lead is generated.	Pick list
Industry	Select the industry to which the lead belongs.	Pick list
Annual Revenue	Specify the annual revenue of the company where the lead is working.	Text box, decimal value (19).
Lead Owner	Display the Zoho CRM user ID to whom the lead is assigned.	Pick list
Phone	Specify the phone number of the lead.	Text box, Alphanumeric (50)
Mobile	Specify the mobile number of the lead.	Text box, Alphanumeric (50)
Fax	Specify the fax number of the lead.	Text box, Alphanumeric (50)
E-mail	Specify the E-mail address of the lead.	E-mail (100)
Skype ID	Specify the Skype ID of the lead. Currently skype ID can be in the range of 6 to 32 characters.	50 characters
Web site	Specify the Web site of the lead.	URL (50)
Lead Status	Select the status of the lead from the drop-down list.	Pick list
Rating	Select the rating of the lead from the drop-down list.	Pick list
No of Employees	Specify the number of employees in lead's company.	Text box, integer value (50)
Street	Specify the street address of the lead.	Text box, Alphanumeric (250)
City	Specify the name of the city where the lead lives.	Text box, Alphanumeric (30)
State	Specify the name of the state where the lead lives.	Text box, Alphanumeric (30)
ZIP Code	Specify the postal code of the lead's address.	Text box, integer value (30)
Country	Specify the name of the lead's country.	Text box, Alphanumeric (30)
Description	Specify any other details about the lead.	Text area (long text)

Creating Leads Individually

You can create leads manually whenever there are very less number of leads. For example, you might have met a person in travel, and in normal chat, he/she has shown some interest in your product/service. After that, you have exchanged business cards and were asked to contact him/her later with more details about the product/service. The next day morning, you can create a lead manually with the available details. The best way to handle this type of scenarios is to create leads manually where you can fill the available details instantly.

You can create leads by:

- Filling details in the lead creation form.
- Using the *Quick Create*, a quick create component present in left hand-side of the *Leads Home* page.
- Duplicating the lead with few changes in the existing lead details

Note: By default, the person who creates the lead owns the lead. If you want to assign the lead to a different user, select the user name from the **Change Owner** field in the lead details view. In addition, the lead status is marked with a default lead status as per your organization's sales process.

To create leads individually

1. Click the New Lead link.
2. In the *Lead:* page, enter the lead-related information.

   Note: The **Last Name** and **Company** fields are mandatory. Refer to the List of Standard Lead-related Fields section for more details.
3. Click **Save**. Lead details are displayed in *Lead: <Lead Name>* page where you can perform the additional operations. Refer to the Associating Leads with Other Records section for more details.

To create leads instantly

1. Click the **Leads** tab.
2. In left hand-side under the **Quick Create** section, enter the mandatory details, such as Last Name and Company name.
3. Click **Save**. Lead details are displayed in *Leads Home* page, where you can update the additional details.

To create duplicate leads

1. Click the **Leads** tab.
2. In the *Lead List* view page, select the lead to be duplicated.
3. In the *Lead: <Lead Name>* page, click the **Clone** button.
4. In the *Edit: <Lead Name>* page, modify some of the lead details.
5. Click **Save**. Lead details are displayed in the *Lead: <Lead Name>* page where you can perform the additional operations.

Importing Leads

(Access Privilege: Data import permission)

Importing leads from external to the CRM system is one of the most important activities in marketing and sales, when you are using different systems to gather leads data. For example, you may be purchasing leads from external sources, capturing product requests through Web site, getting leads from a different business unit within organization where there is a chance of cross-selling of products, or migrating data from your old system to the Zoho CRM system. In all these cases, importing leads enhances your productivity.

You can import leads, if you are authorized to perform this operation. Otherwise, **Import Leads** button in *Leads Home* page will be hidden in your user interface. By default, lead ownership is held up with the user, who imports the leads. You can change the lead ownership while importing by adding a **lead owner** column in import (CSV/XLS) file and map to the **Assigned To** field. This will automatically assign leads to particular users. Use the exact Zoho CRM users' names while creating the lead import file, otherwise leads are not created in Zoho CRM.

Important Tips

*   Before importing leads, you must have the lead details in a CSV/XLS file.
*   You must have privilege to import the leads into the Zoho CRM system.
*   Before importing the leads, close the CSV/XLS file and the Spreadsheet program.
*   Remove apostrophe any place in the CSV file (For example, ABC's).
*   You can import a maximum of 1000 leads in one import cycle.

To import leads

1. Click the **Leads** tab.
2. In the *Leads: Home* page under *Lead Tools* section, click the **Import My Leads** or **Import My Organization Leads** button.

> ✎**Note:** Import link is displayed only if you have privilege to use Import feature. Please contact your administrator in case these links are disabled.

3. In the *Specify Import File:* page, browse the leads-related import file (CSV/XLS format) and then click the **Next** button.
4. In the *Fields Mapping* page, map the CSV/XLS column header with lead fields in Zoho CRM.
5. Click the **Import** button. It will take few minutes to complete the importation.
6. In the *Import Summary* page, click the **Go to Leads List** button.
7. In the *Leads: Home* page, imported leads are displayed under the *Leads List* section. You can continue the importation further or complete the operation.

Merging Duplicate Leads

Over a period, there may be a chance of accumulation of duplicate leads. You can merge these duplicate leads for a better organization of your leads.

To merge duplicate leads

1. Click the **Leads** tab.
2. In the *Leads Home* page, under the **Lead List** section, click the required lead.
3. In the *Lead Details* page, click the **Find & Merge Duplicates** button.
4. In the *Find Duplicate Leads* page, do the following:
    1. Under the *Search Criteria* section, by default the some of the matching criteria and the corresponding values are displayed. Add additional criteria if required. Click the **Search** button.
    2. Under the *Matching Leads* section, select the leads to be merged.
    3. Click the **View Duplicates** button.
5. In the *Merge Leads* page, select the fields to be updated to master record. All the duplicate fields are highlighted with a different color.
6. Click the **Merge** button. The field's details will be merged with the master lead record and lead details page is displayed for further operations.

Associating Leads with Other Records

(Access Privilege: Read/Write permission)

After creating leads, you may need to associate leads with other records, such as tasks, events, E-mails, products, attachments, and notes until the lead is reached to a certain stage where it can be converted to potential as per your organization's sales process.

To associate lead with other records

1. In the *Lead: <Lead Name>* page, you can update the following details:
    2.
        o **Open Activities:** To add tasks and events (meetings, and calls).
        o **Closed Activities:** To archive the closed activities.
        o **Products:** To add products to the lead.
        o **Attachments & Notes:** To attach documents and notes to the lead.
        o **Mails:** To archive the sent email messages as part of the mass mailing.
        o **Notes:** To add notes to the lead.

2. After updating the associated records, you can work with the next record.

Sending Email to Leads

(Access Privilege: Write permission)

You can send bulk Emails to the selected leads from the *Leads* module. Before sending E-mail, ensure that the lead contains a valid Email address; otherwise, Email will not be sent to the corresponding lead.

To send Emails to individual leads

1. Click the *Leads* tab.
2. In the *Leads: Home* page under the *Lead List View* section, select the lead.
3. In the *Lead Details* page, go to Mails related list view and click the **Send Mail** button.
4. In the Compose Mail page, enter the email message, attach files, add additional email IDs in CC & BCC fields, and finally click the **Send** button. An Email will be sent to the recipients and copy of the mail is stored under Mails related list view.

To send E-mails to a group of leads

1. Click the *Leads* tab
2. In the *Leads: Home* page under the *Lead Tool* section, click the <u>Mass E-mail Lead</u> link.
3. In the *Mass E-mail* page, do the following:
    o By default, the **E-mail Template** tab is enabled. Select the template to be used from the **E-mail Template** pick list. The template content is displayed under *E-mail Template Body* section.
    o Click **Matching Criteria** tab. You can create a leads mailing list by specifying the matching criteria under Specify Criteria section.

4. Click the **Send** button to send the E-mail message to the selected leads.

Exporting Leads

(Access Privilege: Data export permission)

Occasionally it is very useful to export the leads from Zoho CRM to Spreadsheet programs, such as Microsoft Excel, OpenOffice, and others for further data analysis.

To export leads to external sources

1. Click the **Leads** tab.
2. In the *Leads: Home* page under the *Lead Tools* section, click the **Export All Leads** button.
3. In the *File Download* pop-up dialog, Click **Save** to save the leads details in CSV/XLS file format.

Converting Leads to Other Sales Records

(Access Privilege: Lead Conversion permission)

Once lead status has reached a certain stage, where it can be qualified as a potential, i.e., there is a chance of further negotiations with the lead, it can be converted to account, contact, and potential. It depends on your organization's sales process. During lead conversion, all the fields in Lead details are converted to the account, contact, and potential fields. Also the related lists, such as tasks, events,

> **Note:** Once a lead is converted into potential, lead status will be changed to **Converted** in *Leads Home* page.

Lead Conversion Rule

While converting a lead to a potential first a new account and contact are created with the relevant lead data, and then a new potential is created. The following table provides descriptions of the various fields converted to account, contact, and potential (optional) during lead conversion:

Lead Field	Converted To
Salutation	Contact: Salutation
First Name	Contact: First Name

Lead Field	Converted To
Last Name	Contact: Last Name
Company	Account: Name
Designation	Contact: Designation
Lead Source	Potential: Lead Source
Industry	Account: Industry
Annual Revenue	Account: Annual Revenue
Assigned To	Account, Contact, Potential: Assigned To
Phone	Account: Phone Contact: Phone
Mobile	Contact: Mobile
Fax	Account: Fax Contact: Fax
E-mail	Contact: Amyl
Skype ID	Contact: Skype ID
Web site	Account: Web site
Lead Status	Potential: Status
Rating	Potential: Rating
No of Employees	Account: No. of Employees
Street	Account: Street Contact: Street
City	Account: City Contact: City
State	Account: State Contact: State
Postal Code	Account: Postal Code Contact: Postal Code
Country	Account: Country Contact: Country
Custom Fields	Users can add their own custom fields.

To convert leads to other sales records

1. Click the **Leads** tab.
2. In the *Leads: Home* page, select the lead to be converted.
3. In the *Lead: <Lead Name>* page, click the **Convert Lead** button.
4. In the *Convert Lead: <Lead Name>* page, enter the following details:
    5.
    o   Assigned To - Select the user name.

- o Account Name - Display the company name. This field is non-editable.
- o Potential Name - Specify the potential name.
- o Potential Close Date - Specify the potential closing date or select the date from the pop-up Calendar.

5. Click **Save**.

Mapping Custom Fields

(Access Privilege: System Administrator permission)

By default, all the standard lead fields are mapped with the corresponding account, contact, and potential

To map lead fields with other records

1. Click the <u>Setup</u> link.
2. In the Setup page, expand the <u>Lead Settings</u> section and click the <u>Fields</u> link.
3. In the *Lead Fields* page, click the **Map Custom Fields** button.
4. In the *Map Lead Custom Fields* page, custom fields are displayed under **Lead Custom Fields** column.

Changing Lead Status

(Access Privilege: Read/Write permission)

When the prospecting is in progress, it may be very useful to change the status of some of the leads in a single step. Lead status is customizable and your administrator has already configured the **Lead Status** field as per your organization's sales process. You can change the status of individual lead or group of leads.

To change the status of leads individually

1. Click the **Leads** tab.
2. In the *Leads: Home* page, select the lead.
3. In the *Lead: <Lead Name>* page, click the **Edit** button.
4. In the *Lead: <Lead Name>* page, change the lead status from **Lead Status** pick-list.
5. Click **Save** to update the lead status.

To change the status of leads in bulk

1. Click the **Leads** tab.
2. In the *Leads: Home* page, go to the **Lead List** section and select the check boxes corresponding to the leads. You can also select all the leads.
3. Click the **Change Status** button.
4. In the *Leads: Change Status* page, select the status from the **Select New Status** pick list and click the **Update Status** button.

> **Note:** Leads status will be changed to a new status, irrespective of its existing status. Use this operation carefully, otherwise leads at different states will be changed to new status violating the organization's sales process. If you are not sure of using this operation, change the status of leads one-after-another. The other ways of overcoming this problem is first search the leads with a required status then change the status in bulk.

Changing Lead Owner

(Access Privilege: Read/Write permissions)

When the prospecting is in progress, occasionally it may be very useful to change the owner of some of the leads in a single step. You can change the owner of an individual lead or a group of leads.

To change owner of leads individually

1. Click the **Leads** tab.
2. In the *Leads: Home* page, select the lead.
3. In the *Lead: <Lead Name>* page, click the **Edit** button.
4. In the *Lead: <Lead Name>* page, change the lead owner from the **Lead Owner** lookup field.
5. Click **Save** to update the lead owner.

To change owner of leads in bulk

1. Click the **Leads** tab.
2. In the *Leads: Home* page, go to the **Lead List** section and select the check boxes corresponding to the leads. You can also select all the leads.
3. Click the **Change Owner** button.
4. In the *Leads: Change Owner* page, select the user from the **Select New Owner** pick list and click the **Update Owner** button to change the owner of the leads permanently.

> ⚠️**Warning:** Leads ownership will be changed to another user, irrespective of its existing owner. Use this operation carefully, otherwise leads belonging to different users will be changed to new user. To overcome this problem, first you may search the leads with a required owner name then change the owner in bulk.

Viewing Reports

(Access Privilege: Read/Write permission)

You can directly access some of the standard reports pertaining to leads from the *Lead Reports* section. In addition to reports, you can access one of the dashboards in Leads module.

By default, the following reports are displayed under Leads module:

- Leads By Source
- Leads By Status
- Today's Leads
- Leads by Ownership
- Converted Leads
- Leads by Industry

To view Lead report

1. Click the **Leads** tab.
2. In the *Leads: Home* page, go to the **Lead Reports** section.
3. Click the required Report link. The Report is displayed in Reports page, which can be further customized as per your requirements.

Printing Lead Details

(Access Privilege: Read permission)

You can view the lead details in printable form and print them using browser's Print function.

To print lead details

1. Click the **Leads** tab.
2. In the *Leads: Home* page, go to the **Lead List** section and select the required lead.
3. In the *Lead: <Lead Name>* page, click the Printable View link.

4. In the *Lead: <Lead Name>* page, click the **Print Page** button. You can print the
document using the Web browser print function.

Deleting Leads

(Access Privilege: Read/Write/Delete permissions)

Occasionally you may need to remove some of the unnecessary leads from the Zoho CRM
system for a better user experience. You may consider removing leads that are not useful for
future reference.

⚠️**Warning:** The deleted leads are temporarily stored in Recycle Bin. If required you can
restore the deleted leads again. However, if you delete leads from Recycle Bin, you cannot
restore again.

To delete leads individually

1. Click the **Leads** tab.
2. In the *Leads: Home* page, select the lead.
3. In the *Lead: <Lead Name>* page, click the **Delete** button.
4. In the *Confirmation* dialog, click **OK** to remove the lead permanently.

To delete leads in bulk

1. Click the **Leads** tab.
2. In the *Leads: Home* page, go to the *Lead List* section and select the check boxes
corresponding to the leads to be removed.
3. Click the **Delete** button.
4. In the *Confirmation* dialog, click **OK** to remove the selected leads permanently.

Customizing Leads

(Access Privilege: System Administration)

Customization of the Leads module includes, renaming the tab name, modifying the pick list
values in standard fields, adding new custom fields, modifying lead page layout, and show/hide
the related list views according to your Lead management process requirements.

Setting up Lead Assignment Rules

(Access Privilege: Manage Lead Assignment Permission)

You can setup lead assignment rules based on your organization-wide lead distribution (based on sales territories) process so that leads generated through import tool are automatically assigned to the respective sales team members.

Lead Assignment Workflow

- Create lead assignment rule.
- Associate rule entries to the assignment rule, which contains matching criteria, selecting user, and adding default workflow task.
- Select the required assignment rule in lead import tool
- During lead importation, first assignment rule is evaluated and the leads are assigned to the Zoho CRM users according matching criteria.

Limitations

- You can create up to 20 different lead assignment rules.
- In each assignment rule, you can associate up to 20 different criteria.
- Even though you can setup multiple rules, users can select only one rule at a time.
- Lead assignment rule can be used only for the leads generated through import tool.

To set up lead assignment rules

1. Click the <u>Setup</u> link.
2. In the *Settings Home* page, under the *Lead Settings* section click the <u>Assignment Rules</u> link.
3. In the *Lead Assignment Rules* page, under the *Rules List* section list of default rules are displayed. Click the **Create New Rule** button to add a new rule.
4. In the *New Rule* page, specify the rule in the **Rule Name** field and click the **Save**.

Specify Rule Name

5. In the *Lead Assignment Rule Entry* page, under the *Rules Entries* section list of default rule entries are displayed. Click the **Create New Rule Entry** button to add a new rule entry.
6. In the *Rule Entry* page, do the following:
   1. **Specify Criteria:** Select the matching criteria to evaluate the rule (Refer to [Managing Workflow](#))
   2. **Select User:** Select the user to whom the lead has to be assigned.
   3. **Add Task:** Select the workflow task to be assigned (Refer to [Managing Workflow](#))
7. Click **Save**.

Rule Entry

⊘ **Specify Criteria** ①

○ Match all of the following   ○ Match any of the following

✖ Country ▾ contains ▾ USA, United States

✖ and City ▾ contains ▾ New York

Add Criteria

⊘ **Specify User:** ②

* **Assign To:** gopals 🔍

⊘ **Associate Task:** ③

📝 Note:
 → To create a new workflow task, you must exit this process and create the new workflow task in your personal setup section.
 → Lead Assignment Rules automatically assigns the task selected below based on the criteria specified in the rule entry.

Select a task to associate with the rule entry: Follow up Lead 🔍

Remove

Save **Cancel**

Specify Rule Details

Capturing Leads from Web site (Web-to-Lead Form)

(Access Privilege: Web-to-Lead Permission)

Using Web-to-Lead form your organization can allow Web site visitors submitting their information directly so that you can create leads directly. All the leads captured through Web site are first assigned to the Lead Administrator, which can be reassigned to the corresponding Sales persons.

Important Points

- Anyone visiting your Web site can submit leads and submit any type of information. Hence, you cannot control the Spam.
- All the leads are first assigned to the User selected in Web-to-Lead settings page. The Lead Administrator can change the lead ownership to other users.
- To send automate replies to visitors select the required e-mail template from the Web-to-Lead settings.
- The generated Web-to-Lead form contains only Web form related tags. You have to customize the generated Lead form further to suite your Website requirements.
- Test the complete workflow of Web-to-Lead form, before publishing in the Website.

Note: For creating a lead, **Last Name** and **Company Name** fields are mandatory. If your Website visitors do not enter these fields, lead with company name as "Not Available" is created.

To create Web-to-Lead form

1. Click the Setup link.
2. In the *Settings Home* page, under the *Lead Settings* section click the Web-to-Lead link.
3. In the *Capturing Leads from Website* page, do the following:
4. Enable **Web-to-Lead** option for your organization: Refer *To configure Web-to-Lead settings* section.
5. Set up **Custom Lead Fields** in Web-to-Lead form: Refer To add custom lead fields in Web-to-Lead form section.
6. **Generate HTML page** as per your fields in the Web-to-Lead form: Refer To generate HTML page for Web-to-Lead form section.
7. The generated HTML page contains only the web form objects and minimal HTML tags. Customize the web page according to your Website layout requirements.
8. Publish the Web-to-Lead form in your Website. Your visitors can submit their contact information, which will be routed to Leads module. All the leads captured through Web Form are assigned to the Owner selected in Web-to-Lead settings page.

To configure Web-to-Lead settings

1. In the *Capturing Leads from Website* page, click the <u>Web-to-Lead</u> link.
2. In the *Web-to-Lead Settings* page do the following:
3. **Enable Web-to-Lead:** Select the check box the enable the Web-to-Lead form.
4. **Return URL:** Specify the URL of the page to be displayed after visitor submits the case (For example, Thanks page for submitting the information)
5. **Web Leads Approval:** Select the checkbox to enable approval system, so that leads will be assigned to respective sales person upon approving the lead. By default, the lead approval is disabled.
6. **Default Lead Owner/Creator:** Specify the Zoho CRM user to whom the case has to be assigned.
7. **Default Response Template:** Select the automate e-mail response template, which is used for sending an e-mail to the person submits the case.
8. Click **Save**. Again, *Capturing Leads from your Web Site* page is displayed.

To add custom lead fields in Web-to-Lead form

1. In the *Capturing Leads from Website* page, click the <u>Setup Custom Lead Fields</u> link.
2. In the Lead Fields section, add the custom fields to be added. For more details, refer to *Customizing Zoho CRM*
3. Once you have completed the field customization, click the <u>Web-to-Lead</u> link under *Lead Settings* section.

To generate HTML page for Web-to-Lead form

1. In the *Capturing Leads from Website* page, click the <u>Generate the HTML</u> link.
2. In the *Generating HTML for Web-to-Lead* page, do the following:
    1. Select Web Form Fields: Select the lead fields to be displayed in the Web Form.
    2. **Confirm Password:** Specify your password (User who creates the Web-to-Lead form) to authenticate your Account from the Zoho CRM on-demand service.
3. Click the **Generate HTML** button.
4. In the *Copy Generated HTML* page, copy the HTML content, paste to your favorite HTML editor, and click the **Finish** button.
5. Customize the Web-to-Lead form (HTML page) to suite your Website requirements and publish in your Website.

Warning: If you change your password after publishing the Web-to-Lead form, please ensure that updating the following information in Web-to-Lead form.

Example:

```
<!-- Begin: Do not edit the section -->
<form action="http://zohocrm.com/crm/WebtoLeadServlet?encoding=UTF-8" method="POST">
<input type='hidden' name='orgId' value='1'/>
<input type='hidden' name='xnQsjsdp' value=Z29wYWxzQGFkdmVudG5ldC5jb20=/>
<input type='hidden' name='xmPqMMnsd' value=dGVzdGl0/>
<input type='hidden' name='actionType' value=Q2FzZXM=/>
<input type='hidden' name='returnURL' value='http://www.zohocrm.com' />
<!-- End: Do not edit the section -->
```

Otherwise, leads submitted through Website will not be captured in Leads module, due to authentication failure.

Approving Leads Captured through Website

(Access Privilege: Web-to-Lead Permission)

By default, leads captured through Website are assigned to one of the Lead Administrator who can update the leads with additional information and assign to the corresponding Sales Person in your organization. It will allow your sales persons focus mainly on high priority leads (lead contain correct contact information, and interest on your offering).

To approve leads from Website

1. Click the Setup link.
2. In the *Settings Home* page, under the *Lead Settings* section click the Approve Web Leads link.
3. In the Web-to-Lead Approval page, under Web-to-Lead list, leads are displayed. View the lead details, assign to specific user, and click the **Approve** button. Afterwards lead owner can follow-up the lead.

Working with Accounts

Introduction

In a typical Business to Business (B2B) scenario, **Account** represents a Company or a Department within the company, with which your Company is doing or planning to do business in future. In an Account, you can store the company address, number of employees, annual revenue, and other details.

You can associate an account with contacts (persons) within the company and the potentials (business opportunities) during pre-sales. After successful completion of the sales, you can also provide customer support & service through Zoho CRM - Case Management.

The Accounts home page contains,

- Accounts List
- Account Reports
- Tools, such as Import, Export, mass transfer, and delete accounts
- Quick Create pane
- Search
- Alphabetical Search
- Custom Views
- Change Owner
- Delete
- Page Navigation

You can perform the following operations in the **Accounts** module:

- Navigate accounts
- Search accounts (Alphabetical or advanced options)
- Create list views
- Create accounts (Form filling, quick create, or duplicate options)
- Import accounts (from external sources)
- Associate account with other records
- Export accounts to spreadsheets
- Change account owner (individually or in bulk)
- Print account details
- View reports
- Delete accounts (individually or in bulk)
- Customize accounts

Navigating Accounts

(Access Privilege: Read permissions)

You can navigate accounts according to the type of account.

To navigate accounts

1. Click the **Accounts** tab.
2. In the *Accounts Home* page, under the **Account List** section, select one of the views from **Select View** drop-down list to display the list of accounts according to the type of the account (For example, Prospect, Investor, Reseller, and others).
3. In the **Account List** section, click the <u>Start</u>, <u>Previous</u>, <u>Next</u>, or <u>End</u> links to access the respective list of accounts.

Searching Accounts

(Access Privilege: Read permission)

You can search the contacts alphabetically or filling the required information in Search box.

To search accounts

1. Click the **Accounts** tab.
2. In the *Accounts Home* page, under the *Account Search* section, do one of the following:
    o Specify the search criteria in Search box and click the **Go** button. Or
    o Select one of the alphabetical search links.
3. In the *Contact List* page, list of accounts are displayed as per search criteria.

Creating List Views

(Access Privilege: Read/Write permissions)

In the *Account List* you can create/modify/delete the custom views, sort columns in the list view (ascending/descending order), search the records available in the current list view. In addition, you can modify some of the columns in standard list views. By default, the following standard list views are available in the Accounts module:

- Standard Views
    o All Accounts

- o My Accounts
- o New This Week
- o New Last Week
- Recent Views
  - o Recently Created Accounts: Accounts created during 24 hours.
  - o Recently Modified Accounts: Accounts modified during 24 hours.
  - o Recently Viewed Accounts: Accounts viewed during 24 hours.

Note: User created list views are displayed under **User Created Views** category in **View** drop-down list.

To create custom views

1. Click the **Accounts** tab.
2. In the *Accounts Home* page, under *Account List* section, click the <u>Create View</u> link.
   Note: Under Account List section, some of the standard list views are displayed. You can only rearrange the order of columns and more columns.
3. In the *Create New View* page, do the following:
   - o In the *View Information* section, specify name of the custom view in the **View Name** (mandatory) field. The custom view name appears in the View drop-down list. You can also set the custom view as a default list view by selecting the **Set as Default View** check box.
   - o In the *Specify Criteria* section, specify the filter criteria. For more details, refer to the <u>Specifying List View Criteria</u> section.
   - o In the *Choose Columns* section, select the columns to be displayed in the List View. For more details, refer to the <u>Selecting List View Columns</u> section.
   - o In the *Accessibility Details* section, select the users to whom custom list view has to be enabled. For more details, refer to the <u>Enabling View Access</u> section.
4. Click **Save**. The custom list view is displayed in the View drop-down list.

Creating Accounts

(Access Privilege: Read/Write permissions)

In Zoho CRM, you can create accounts by:

- Entering data in account details form
- Duplicating the account with a few changes from the existing account details
- Using the *New Account*, a quick create component present in left hand-side of the *Accounts Home* page

- Importing accounts from other Contact Management and CRM applications
- Synchronizing Microsoft Outlook contacts with Zoho CRM (Special case: An account will be created in Zoho CRM while Company Name field is specified in the Microsoft Outlook)
- Converting leads to accounts

Note: Some of the standard fields listed below may not be visible/editable depending on your organization business process and field-level security settings. In case your organization added/modified fields, please contact your System Administrator for more details about usage of the other fields.

List of Standard Account-related Fields

In the **Account: Edit** form, you need to specify the account-related information. The following table provides descriptions of the various standard fields in the form.

Field Name	Description	Data Type
Account Name*	Specify the company name. This field is mandatory.	Text box, alphanumeric (100)
Website	Specify the URL of the company's Web site.	URL, alphanumeric (30)
Ticker Symbol	Specify the ticker symbol of the Company.	Text box, alphanumeric (30)
Parent Account	Select the parent company name from the Change pop-up dialog.	Lookup
Employees	Specify the number of employees in account's company.	Text box, integers (10)
Ownership	Specify the type of ownership of the company.	Text box, alphanumeric (50)
Industry	Select the type of industry from the drop-down list.	Pick list
Type	Select the type of account from the drop-down list.	Pick list
Account Owner	Select the Zoho CRM user to whom the account to be assigned. By default, the record is assigned to the user who creates it.	Pick list
Phone	Specify phone number of the account.	Text box, alphanumeric (30)
Fax	Specify fax number of the account.	Text box, alphanumeric (30)

E-mail	Specify the official E-mail address of the account.	E-mail, alphanumeric and special characters (100)
Rating	Specify the rating of the account.	Pick list
SIC Code	Specify the Standard Industrial Classification code of the account.	Text box, integers (10)
Annual Revenue	Specify the annual revenue of the account.	Text box, integers (10)
Billing Address • Street • City • State • Postal Code • Country	Specify the billing address of the account to send the quotes, invoices, and other agreements.	• Street, alphanumeric (250) • City, alphanumeric (30) • State, alphanumeric (30) • Postal Code, alphanumeric (30) • Country, alphanumeric (30)
Shipping Address • Street • City • State • Postal Code • Country	Specify the shipping address of the account to deliver the shipment.	-Do-
Description	Specify any other details about the account.	Text area (32 Kb)

Notes: By default, the person who creates the account owns the account.
If you want to assign the account to a different user, in account creation form,
select the user name from **Assigned To** field. In addition, the account status

is marked with a default account status, as per your organization's sales process.

To create accounts individually

1. Click the <u>New Account</u> link.
2. In the *Account:* page, specify the account details.

     Note: Account Name is a mandatory field. Refer to the <u>List of Standard Account-related Fields</u> section for more details.

3. Click **Save**. Account details are displayed in *Account: <Account Name>* page where you can perform the additional operations. Refer to <u>Associating Accounts with Other Records</u> section for more details.

To create accounts instantly

1. Click the **Accounts** tab.
2. In left hand-side under the **New Account** section, enter the mandatory details, such as Company name.
3. Click **Save**. Account details are displayed in *Account: <Account Name>* page where you can update additional details or perform the additional operations.

To create duplicate accounts

1. Click the **Accounts** tab.
2. In *Account List* view page, select the account to be duplicated.
3. In *Account: <Account Name>* page, click the **Duplicate** button.
4. In *Edit: <Account Name>* page, modify some of the account details.
5. Click **Save**. Account details are displayed in *Account: <Account Name>* page where you can perform the additional operations.

Importing Accounts

(Access Privilege: Data Import permission)

You can import your accounts from other legacy Business applications to Zoho CRM to have a better-centralized database.

Tips:

- Before importing accounts into Zoho CRM, you must have the accounts details in CSV/XLS file.
- You must have privilege to import the accounts into Zoho CRM.
- Before importing the accounts into Zoho CRM close the import file and the Spreadsheet program.
- Remove apostrophe if present in any place in the CSV file (For example, ABC's).
- You can import a maximum of 1000 accounts in one import cycle.

To import accounts

1. Click the **Accounts** tab.
2. In the *Accounts: Home* page under *Account Tools* section, click the **Import My Accounts** or **Import My Organization Accounts** button.

   Note: Import link is displayed only if you have privilege to use Import feature. Please contact your administrator in case these links are disabled.

3. In the *Specify Import File:* page, browse the accounts-related import file (CSV/XLS format) and then click the **Next** button.
4. In the *Fields Mapping* page, map the CSV/XLS column header with account fields in Zoho CRM.
5. Click the **Import** button. It will take a few seconds to complete the importation.
6. In the *Accounts: Home* page, imported accounts are displayed under the *Accounts List* section. You can continue the importation further or complete the operation.

Associating Account with Other Records

(Access Privilege: Read/Write permissions)

You can create a 360 degrees view of the account to display all the associated details, such as contacts, potentials, trouble tickets, activities, attachments, and notes in a single view.

To associate account with other records

1. In the *Account: <Account Name>* page, update the following details:

- o **Potentials:** To add potentials to the account
- o **Contacts:** To add contacts to the account
- o **Open Activities:** To add tasks and events (meetings, and calls) to the account.
- o **Closed Activities:** To display the closed activities
- o **Products:** To add products to the account.
- o **Quotes**: To add quotes to the account.
- o **Sales Orders**: To add sales orders to the account.
- o **Invoices**: To add invoices to the account.
- o **Attachments & Notes:** To attach documents and notes to the account.
- o **Member Accounts:** To add other divisons or subsidiaries to the parent account.
2. After updating the associated records, you can move to the next record.

Exporting Accounts

(Access Privilege: Data Export permission)

Occasionally it is very useful to export the accounts from Zoho CRM to Spreadsheet programs, such as Microsoft Excel, OpenOffice, and others for further data analysis.

To export contacts to external sources

1. Click the **Accounts** tab.
2. In the *Accounts: Home* page under *Account Tools* section, click the **Export All Accounts** button.
3. In the *File Download* pop-up dialog, Click **Save** to save the Accounts files in **CSV/XLS** file format.

Merging Duplicate Accounts

Over a period, there may be a chance of accumulation of duplicate accounts. You can merge these duplicate accounts for a better organization of your accounts.

To merge duplicate accounts

1. Click the **Accounts** tab.
2. In the *Accounts Home* page, under the **Account List** section, click the required account.
3. In the *Account Details* page, click the **Find & Merge Duplicates** button.
4. In the *Find Duplicate Accounts* page, do the following:

1. Under the *Search Criteria* section, by default the some of the matching criteria and the corresponding values are displayed. Add additional criteria if required. Click the **Search** button.
2. Under the *Matching Accounts* section, select the accounts to be merged.
3. Click the **View Duplicates** button.

5. In the *Merge Accounts* page, select the fields to be updated to master record. All the duplicate fields are highlighted with a different color.
6. Click the **Merge** button. The field's details will be merged with the master account record and account details page is displayed for further operations.

Changing Account Owner

(Access Privilege: Owner change permission)

When the prospecting is in progress, occasionally it may be very useful to change the owner of some of the accounts in a single step. You can change the owner of an individual account or a group of accounts.

To change owner of accounts individually

1. Click the **Accounts** tab.
2. In the *Accounts: Home* page, select the contact.
3. In the *Account: <Account Name>* page, click the **Edit** button.
4. In the *Account: <Account Name>* page, change the account owner from the **Account Owner** lookup field.
5. Click **Save** to update the account owner.

To change owner of accounts in bulk

1. Click the **Accounts** tab.
2. In the *Account: Home* page, go to the **Account List** section and select the check boxes corresponding to the accounts. You can also select all the accounts.
3. Click the **Change Owner** button.
4. In the *Accounts: Change Owner* page, select the user from the **Select New Owner** pick list and click the **Update Owner** button to change the owner of the accounts permanently.

⚠️**Warning:** Accounts ownership will be changed to another user, irrespective of its existing owner. Use this operation carefully, otherwise accounts belonging to different users will be changed to new user. To overcome this problem, first you may search the

accounts with a required owner name then change the owner in bulk.

Printing Account Details

(Access Privilege: Read permission)

You can view a printable form and print the account details using browser's Print function.

To print account details

1. Click the **Accounts** tab.
2. In the *Accounts: Home* page under the *Account List* section, select the required account.
3. In the *Account: <Account Name>* page, click the **Print Preview** button.
4. In the *Account: <Account Name>,* page, click the **Print Page** button to print the document.

Viewing Reports

(Access Privilege: Read/Write permissions)

You can directly access some of the standard reports pertaining to accounts from the *Account Reports* section. By default, the following reports are displayed under accounts module:

- Contact Mailing List
- Key Accounts
- Accounts by Industry

To view account reports

1. Click the **Accounts** tab.
2. In the *Accounts: Home* page, go to the **Account Reports** section.
3. Click the required Report link. The Report is displayed in Reports page, which can be further customized as per your requirements.

For more details about reports customization refer to Chapter <>: <u>Working with Reports</u>

Deleting Accounts

(Access Privilege: Read/Write/Delete permissions)

Rarely, you may need to remove some of the unnecessary accounts (customers) from the Zoho CRM database to have a better control over the existing accounts.

You can delete accounts that are not useful, individually or in bulk. All the deleted accounts are stored in Recycle bin. If required you can restore the accounts. However, if you delete the records from Recycle Bin your records will be deleted permanently, hence use this option carefully.

While deleting the accounts, the related activities, notes, and attachments are also deleted.

⚠️**Warning:** The deleted accounts are temporarily stored in Recycle Bin. If required you can restore the deleted accounts again. However, if you delete accounts from Recycle Bin, you cannot restore again.

To delete accounts individually

1. Click the **Accounts** tab.
2. In the *Accounts: Home* page, select the account.
3. In the *Account: <Account Name>* page, click **Delete**.
4. In the *Confirmation* dialog, click **OK** to delete the account permanently.

To delete accounts in bulk

1. Click the **Accounts** tab.
2. In the *Accounts: Home* page under the *Account List* section, select the check boxes corresponding to the accounts to be removed.
3. Click the **Delete** button.
4. In the *Confirmation* dialog, click **OK** to delete the selected accounts permanently.

Customizing Accounts

(Access Privilege: Customize ZohoCRM.com permission)

Customization of the accounts module includes, renaming the tab name, modifying the pick list values in standard fields, adding new custom fields, modifying accounts page layout, and show/hide the related list views according to your Account management process requirements.

Working with Contacts

Introduction

Contacts are people with whom you communicate, either in pursuit of a business opportunity or for personal reasons. In Business-to-Consumer (B2C) scenario, contact is the most important information for acquiring customers where as in Business-to-Business (B2B) it is a part of the organization details with which you are doing business. You can also create personal contacts that are not associated with any account. A personal contact does not display as part of the account or business opportunity information. Only you can see your personal contacts.

Contacts can be added to the Zoho CRM system by filling the contact form, importing contacts from other Contact Management & CRM applications, synchronizing contacts from the Microsoft Outlook software, or converting leads to contacts. Contact information can include an address, title, phone numbers, e-mail address, Birth date, and other personal details of an individual.

The most important function of contacts module in the Zoho CRM system is they can be used for both customers' acquisition as well as procurement of products from the vendors, i.e., contacts can be related to accounts as well as vendors according to your business process.

Contacts Module contains the following:

- Contact List View
- Page Navigation
- Quick Create Contacts
- Contact Reports
- Contact Tools such as Import, Export, Mass Delete, and Mass Transfer
- Alphabetical Search
- Custom Views

You can perform the following operations in Contacts module:

- Navigate contacts
- Search contacts (Alphabetical or advanced search options)
- Create list views
- Create contacts (Form filling, quick create, or duplicate options)
- Import contacts (from external sources)
- Associate contacts with other records
- Send E-mail to the contacts

- [Export contacts](#) to other spreadsheets
- [Change contact owner](#) (individually or in bulk)
- [View contact related reports](#)
- [Print contact details](#)
- [Delete contacts](#) (individually or in bulk)
- [Customize contacts](#)

Navigating Contacts

(Access Privilege: Read permission)

You can navigate contacts available in the Contact List.

To navigate contacts

1. Click the **Contacts** tab.
2. In the *Contacts Home* page, under the *Contact List* section, select one of the views from **Select View** drop-down list to display the list of accounts according to the type of the account (For example, Prospect, Investor, Reseller, and others).
3. In the **Contact List** section, click the <u>Start</u>, <u>Previous</u>, <u>Next</u>, or <u>End</u> links to access the respective list of contacts.

Searching Contacts

(Access Privilege: Read permission)

You can search the contacts alphabetically or filling the required information in Search box.

To search contacts

1. Click the **Contacts** tab.
2. In the *Contacts Home* page, under the *Contact Search* section, do one of the following:
   - Specify the search criteria in Search box and click the **Go** button. Or
   - Select one of the alphabetical search links.
3. In the *Contact List* page, list of contacts are displayed as per search criteria.

Creating List Views

(Access Privilege: Read/Write permissions)

In the *Contact List* you can create/modify/delete the custom views, sort columns in the list view (ascending/descending order), search the records available in the current list view. In addition, you can modify some of the columns in standard list views. By default, the following standard list views are available in the Contacts module:

- Standard Views
    - All Contacts
    - My Contacts
    - New This Week
    - New Last Week
- Recent Views
    - Recently Created Contacts
    - Recently Modified Contacts
    - Recently Viewed Contacts

Refer to *Chapter <>: Managing List Views* chapter to learn more about creating list views.

To create list views

1. Click the **Contacts** tab.
2. In the *Contacts Home* page, under *Contact List* section, click the Create View link.

> **Note:** Under the *Contact List* section some of the standard list views are displayed. You can only rearrange the order of columns and add more columns to the standard list views.

3. In the *Create New View* page, do the following:
    - In the *View Information* section, specify name of the custom view in the **View Name** (mandatory) field. The custom view name appears in the View drop-down list. You can also set the custom view as a default list view by selecting the **Set as Default View** check box.
    - In the *Specify Criteria* section, specify the filter criteria. For more details, refer to the Specifying List View Criteria section.
    - In the *Choose Columns* section, select the columns to be displayed in the List View. For more details, refer to the Selecting List View Columns section.
    - In the *Accessibility Details* section, select the users to whom custom list view has to be enabled. For more details, refer to the Enabling View Access section.
4. Click **Save**. The custom list view is displayed in the View drop-down list.

Creating Contacts

(Access Privilege: Read/Write permissions)

In Zoho CRM, you can create contacts as given below:

- Entering data in contact details form
- Duplicating the contact with few changes from the existing contact details
- Importing contacts from other Contact Management applications
- Converting leads to contacts
- Synchronizing Microsoft Outlook contacts with Zoho CRM

> **Note:** Some of the standard fields listed below may not be visible/editable depending on your organization business process and field-level security settings. In case your organization added/modified fields, please contact your System Administrator for more details about usage of the other fields.

In the *Contact: Edit* form, you need to specify the contact-related information. The following table provides descriptions of the various fields in the form.

List of Standard Contact-related Fields

Field Name	Description	Data Type
Salutation	Select the Salutation of the contact, such as Mr., Ms, Mrs., or others.	Pick list
First Name	Specify the first name of the contact.	Text box, Alphanumeric (40)
Last Name*	Specify the last name of the contact. This field is mandatory.	Text box, Alphanumeric (40)
Account Name	Select the account related the contact.	Lookup
Lead Source	Select the source from which the contact is created.	Pick list
Title	Specify the job position of the contact.	Text box, Alphanumeric (50)
Department	Specify the department of the contact.	Text box, Alphanumeric (30)
Date of Birth	Specify the birthday of the contact to send greetings for a better relationship.	Date
Reports To	Select the person to whom the contact reports	Lookup
Do Not Call	Select this option not to make a call to the contact (If	Check box

Field Name	Description	Data Type
	the contact is not interested to be contacted by phone even though having a phone number).	
Assigned To	Select the name of the user to whom the contact has to be assigned.	Pick list
Phone	Specify the office phone number of the contact.	Text box, Alphanumeric (50)
Mobile	Specify the mobile number of the contact.	Text box, Alphanumeric (50)
Home Phone	Specify the home phone number of the contact.	Text box, Alphanumeric (50)
Other Phone	Specify the other phone number of the contact (if any).	Text box, Alphanumeric (50)
Fax	Specify the Fax number of the contact.	Text box, Alphanumeric (50)
E-mail	Specify the primary E-mail address of the contact.	Text box, Alphanumeric (100)
Assistant	Specify the name of the contact's assistant.	
Assistant Phone	Specify the phone number of the contact's assistant.	Text box, Alphanumeric (100)
Mailing Address • Street • City • State • Postal Code • Country	Specify the primary address of the contact.	
Other Address • Street • City • State • Postal Code • Country	Specify the other address of the contact (if any).	
Description	Specify any other details about contact.	Text area (long text)

To create contacts individually

1. In the Contacts home page under Contacts list, click the **New Contact** button.
2. In the *Contact: < >* page, enter the contact-related information. The **Last Name** is a mandatory field. Refer to the [List of Standard Contact-related Fields](#) section for more details.
3. Click **Save**. Contact details are displayed in the *Contact: <Contact Name>* page where you can perform the additional operations. Refer to the [Associating Contact with Other Records](#) section for more details.

Note: By default, the person who creates the contact owns the contact. If you want to assign the contact to a different user, in contact creation form, select the user name from the **Assigned To** field.

To create contacts instantly

1. Click the **Contacts** tab.
2. In the left hand-side bar under the **New Contact** section, enter the contact's last name.
3. Click **Save**. Contact details are displayed in the *Contact: <Contact Name>* page where you can update with additional details or perform the additional operations.

To create duplicate contacts

1. Click the **Contacts** tab.
2. In the *Contact List* view page, select the contact to be duplicated.
3. In the *Contact: <Contact Name>* page, click the **Clone** button.
4. In the *Edit: <Contact Name>* page, modify some of the contact details.
5. Click the **Save**. Contact details are displayed in the *Contact: <Contact Name>* page where you can perform the additional operations.

Importing Contacts

(Access Privilege: Data Import permission)

You can import contacts from other Contact Management, CRM, and Address Book applications. Before migrating data, you must convert the data into CSV/XLS format.

> **Tips**
>
> - Before importing contacts into Zoho CRM, you must have the contacts details in a CSV/XLS file.
> - You must have privilege to import the contacts in Zoho CRM.
> - Before importing, the contacts into Zoho CRM close the CSV/XLS file and the Spreadsheet program.
> - Remove apostrophe any place in the CSV file (For example, ABC's).
> - You can import a maximum of 1000 contacts in one import cycle.

To import contacts

1. Click the **Contacts** tab.
2. In the *Contacts: Home* page under *Contact Tools* section, click the **Import My Contacts** or **Import My Organization Contacts** button.
   Note: Import link is displayed only if you have privilege to use Import feature. Please contact your administrator in case these links are disabled.
3. In the *Specify Import File:* page, browse the Contacts-related import file (CSV/XLS format) and then click the **Next** button.
4. In the *Fields Mapping* page, map the CSV/XLS column header with contact fields in Zoho CRM.
5. Click the **Import** button. It will take a few seconds to complete the importation.
6. In the *Contacts: Home* page, imported contacts are displayed under the *Contacts List* section. You can continue the importation further or complete the operation.

Associating Contact with other Records

(Access Privilege: Read/Write permissions)

You can create a 360-degrees view of the contact to display all the associated details, such as potentials, trouble tickets, open activities, history of the completed activities, attachments, and notes.

To associate contact with other records

1. In the *Contact: <Contact Name>* page, you can update the following details:
   - **Open Activities:** To add tasks and events
   - **Closed Activities:** To display all the closed tasks and events
   - **Cases:** To create cases for the contact

- o **Products:** To add products for the contact
- o **Attachments:** To attach documents and notes
- o **Notes**: To attach notes to the contact.
2. After updating the associated records, you can move to the next record.

Sending Emails to Contacts

(Access Privilege: Read/Write permissions)

You can create mailing list for contacts and send mass E-mail to the contacts from contact list view. Please ensure the contacts contain an E-mail ID otherwise, E-mail will not be sent to the corresponding contact(s).

Note: Standard Users can use the standard E-mail templates available in the system where as System Administrator can create E-mail templates from **Setup** section. If you are a System Administrator, refer to the Creating E-mail Templates section.

To send Emails to individual contacts

1. Click the *Contacts* tab.
2. In the *Contacts: Home* page under the *Contact List View* section, select the contact.
3. In the *Contact Details* page, go to Mails related list view and click the **Send Mail** button.
4. In the *Compose Mail* page, enter the email message, attach files, add additional email IDs in CC & BCC fields, and finally click the **Send** button. An Email will be sent to the recipients and copy of the mail is stored under **Mails** related list view.

To send Emails to a group of contacts

1. Click the *Contacts* tab
2. In the *Contacts: Home* page under the *Contact Tool* section, click the Mass E-mail Contacts link.
3. In the *Mass E-mail* page, do the following:
    - o By default, the **E-mail Template** tab is enabled. Select the template to be used from the **E-mail Template** pick list. The template content is displayed under *E-mail Template Body* section.
    - o Click **Matching Criteria** tab. You can create a contacts mailing list by specifying the matching criteria under Specify Criteria section.
4. Click the **Send** button to send the E-mail message to the selected contacts.

Exporting Contacts

(Access Privilege: Data Export permission)

Occasionally it is very useful to export the contacts from Zoho CRM to Spreadsheet programs for further data analysis.

To export contacts to spreadsheets

1. Click the **Contacts** tab.
2. In the *Contacts: Home* page under the *Contact Tools* section, click the **Export All Contacts** button.
3. In the *File Download* pop-up dialog, click **Save** to save the contacts files in CSV/XLS file format.

Changing Contact Owner

(Access Privilege: Owner change permission)

When the prospecting is in progress, occasionally it may be very useful to change the owner of some of the contacts in a single step. You can change the owner of an individual contact or a group of contacts.

To change owner of contacts individually

1. Click the **Contacts** tab.
2. In the *Contacts: Home* page, select the contact.
3. In the *Contact: <Contact Name>* page, click the **Edit** button.
4. In the *Contact: <Contact Name>* page, change the contact owner from the **Contact Owner** lookup field.
5. Click **Save** to update the contact owner.

To change owner of contacts in bulk

1. Click the **Contacts** tab.
2. In the *Contacts: Home* page, go to the **Contact List** section and select the check boxes corresponding to the contacts. You can also select all the contacts.
3. Click the **Change Owner** button.
4. In the *Contacts: Change Owner* page, select the user from the **Select New Owner** pick list and click the **Update Owner** button to change the owner of the contacts permanently.

⚠️**Warning:** Contacts ownership will be changed to another user, irrespective of its existing owner. Use this operation carefully, otherwise contacts belonging to different users will be changed to new user. To overcome this problem, first you may search the contacts with a required owner name then change the owner in bulk.

Printing Contact Details

(Access Privilege: Read permission)

You can view a printable form and print the contact details using browser's Print function.

To print contact details

1. Click the **Contacts** tab.
2. In the *Contacts: Home* page, go to the **Contact List** section and select the required contact.
3. In the *Contact: <Contact Name>* page, click the **Print Preview** button.
4. In the *Contact: <Contact Name>,* page, click the **Print Page** button to print the document.

Viewing Reports

(Access Privilege: Read/Write permissions)

You can directly access some of the standard reports pertaining to contacts from the *Contacts Reports* section. By default, the following reports are displayed under Contacts module:

- Contact Mailing List
- Key Accounts
- Accounts by Industry

To view contact report

1. Click the **Contacts** tab.
2. In the *Contacts: Home* page, go to the **Contacts Reports** section.
3. Click the required report link. The report is displayed in *Reports* page, which can be further customized as per your requirements.

For more details about reports customization refer to Chapter <>: Working with Reports.

Deleting Contacts

(Access Privilege: Read/Write/Delete permissions)

Rarely, you may need to remove some of the unnecessary contacts, which are moved from the existing account or not doing business with you for a long time. This will help you manage your contacts in a better way. You can delete contacts either individually or in bulk.

Note: The deleted contacts are temporarily stored in Recycle Bin. If required you can restore the deleted contacts again. However, if you delete contacts from Recycle Bin, you cannot restore again.

To delete contacts individually

1. Click the **Contacts** tab.
2. In the *Contacts: Home* page, select the contact to be removed.
3. In the *Contact: <Contact Name>* page, click **Delete**.
4. In the *Confirmation* dialog, click **OK** to delete the contact permanently.

To delete contacts in bulk

1. Click the **Contacts** tab.
2. In the *Contacts: Home* page, under the *Contact List* section, select the contacts to be removed using the **Select Contacts** check box (first column).
3. Click the **Delete** button.
4. In the *Confirmation* dialog, click **OK** to remove the selected contacts permanently.

Customizing Contacts

(Access Privilege: Customize ZohoCRM.com permission)

Customization of the contacts module includes, renaming the tab name, modifying the pick list values in standard fields, adding new custom fields, modifying contacts page layout, and show/hide the related list views according to your Contact management process requirements.

Working with Opportunities

In any sales organization, potentials are the most important records to generate the real revenue for the organization. In a typical B2B organization, all the potentials have to undergo a complete sales cycle, which start with identifying the hot prospect and end with sales won or lost. The in between sales activities that has to be completed are sending product information to potentials, product demonstrations, sending sales quotations and business negotiations. Precisely, potential provides the following information for the sales management:

- Sales cycle (Duration of the prospecting the potential)
- The potential sales volume (Product units and price)
- Up-to-minute sales stage and the estimated sales probability in each stage
- Reasons for the sales status (Won/Lost)
- Competitors of the potential
- Forecast for the next quarter/year sales

The Potentials home page contains,

- Potentials List
- Potential Reports
- Tools such as Import, Export, change owner, and delete
- Quick Create pane
- Search
- Alphabetical Search
- Custom Views
- Page Navigation

You can perform the following operations in Potentials module:

- Navigate potentials
- Search potentials (Alphabetical or advanced search options)
- Creating Custom List Views
- Create potentials (Form filling, quick create, or duplicate options)
- Import potentials (from external sources)
- Associate potentials with other records
- Associate competitors with potential
- Add contact roles
- Customize contact roles
- Change potential owner (individually or in bulk)
- Export potentials to spreadsheets

- [Print potentials details](#)
- [View reports](#)
- [Delete potentials](#)(individually or in bulk)
- [Customize potentials](#)
- [Set up Big-Deal Alert](#)
- [Configure Sales Stage pick lists](#)
- [Map Sales Stage-Probability values](#)

Navigating Potentials

(Access Privilege: Read permission)

You can navigate potentials available in the potentials list according to the status of the potentials.

To navigate potentials

1. Click the **Potentials** tab.
2. In the *Potentials Home* page, under the **Potential List** section, select one of the views from the **Select View** drop-down list to display the list of accounts according to the type of the account (For example, Prospect, Investor, Reseller, and others).
3. In the **Potential List** section, click the <u>Start</u>, <u>Previous</u>, <u>Next</u>, or <u>End</u> link to access the respective list of potentials.

Searching Potentials

(Access Privilege: Read permission)

You can search the potentials alphabetically or filling the required information in Search box.

To search potentials

1. Click the **Potentials** tab.
2. In the *Potentials Home* page, under the *Potential Search* section, do one of the following:
   - Specify the search criteria in Search box and click the **Go** button. Or
   - Select one of the alphabetical search links.
3. In the *Potential List* page, a list of potentials is displayed as per search criteria.

Creating Custom List Views

(Access Privilege: Read/Write permissions)

In the *Potential List* you can create/modify/delete the custom views, sort columns in the list view (ascending/descending order), search the records available in the current list view. In addition, you can modify some of the columns in standard list views. By default, the following standard list views are available in the Potentials module:

- **Standard Views**
  - All Potentials
  - My Potentials
  - New This Week
  - New Last Week
  - Closing This Month
  - Closing Next Month
- **Recent Views**
  - Recently Created Potentials
  - Recently Modified Potentials
  - Recently Viewed Potentials

To create custom views

1. Click the **Potentials** tab.
2. In the *Potentials Home* page, under *Potential List* section, click the Create View link.

> **Note:** Under the Potential List section, some of the standard list views are displayed. You can only rearrange the order of columns and more columns.

3. In the *Create New View* page, do the following:
   - In the *View Information* section, specify name of the custom view in the **View Name** (mandatory) field. The custom view name appears in the View drop-down list. You can also set the custom view as a default list view by selecting the **Set as Default View** check box.
   - In the *Specify Criteria* section, specify the filter criteria. For more details, refer to the Specifying List View Criteria section.
   - In the *Choose Columns* section, select the columns to be displayed in the List View. For more details, refer to the Selecting List View Columns section.
   - In the *Accessibility Details* section, select the users to whom custom list view has to be enabled. For more details, refer to the Enabling View Access section.
4. Click **Save**. The custom list view is displayed in the View drop-down list.

Creating Potentials

(Access Privilege: Read/Write permissions)

In Zoho CRM, you can create potentials as given below:

- By entering data in potential details form
- Importing potentials from other sales force automation applications

> *Note:* Some of the standard fields listed below may not be visible/editable depending on your organization business process and field-level security settings. In case your organization added/modified fields, please contact your System Administrator for more details about usage of the other fields.

In the *Potential: Edit* form, you need to specify the potential-related information. The following table provides descriptions of the various fields in the form.

List of standard potential-related fields

Field Name	Description	Data Type
Potential Name*	Specify name of the potential. This field is mandatory.	Text box, Alphanumeric (120)
Account Name*	Select name of the account to which potential has to be created. This field is mandatory.	Lookup
Type	Select the type of potential (New Business or Existing Business) from the drop-down list.	Pick list
Lead Source	Select the lead source from the drop-down list	Pick list
Product Name	Select the product name from the pick list.	Text box, Alphanumeric (50)
Amount	Specify the amount that can be expected after closing the potential.	Text box, Decimal (10)
Expected Close Date*	Specify or select the expected close date. This field is mandatory.	Date format (yyyy/mm/dd)
Next Step	Specify the next step of the sales process.	Text box, Alphanumeric (100)
Sales Stage*	Select the sales stage from the drop-down list. This filed is mandatory.	Pick list
Probability	Specify the probability of closing a potential.	Text box, Decimal (2, 2)

Field Name	Description	Data Type
Assigned To	Select the user to whom the potential has to be assigned.	Pick list
Description	Specify any other details about potential.	Text area (long text)

You can create potentials by:

- Filling details in the potential creation form.
- Using the *New Potential*, a quick create component present in left hand-side of the *Potentials Home* page
- Duplicating the contact with a few changes from the existing contact details

To create potentials individually

1. Click the New Potential link.
2. In the *Potential: page*, enter the potential information.

   Note: Company name is a mandatory field. Refer to the "List of Standard Potential-related Fields" section for more details.
3. Click **Save** to save the potential information. Potential details are displayed in *Potential: <Potential Name>* page where you can perform the additional operations. Refer to the Associating Potentials with Other Records section for more details.

To create potentials instantly

1. Click the **Potentials** tab.
2. In left hand-side under **New Potential** section, enter the mandatory details, such as Potential Name, Account Name, Expected Close Date, and Sales Stage.
3. Click **Save**. Potential details are displayed in *Potential: <Potential Name>* page where you can update the additional details or perform the additional operations.

To create duplicate potentials

1. Click the **Potentials** tab.
2. In the *Potential List* view page, select the potential to be duplicated.
3. In the *Potential: < Potential Name>* page, click the **Duplicate** button.
4. In the *Edit: < Potential Name>* page, modify some of the potential-related details.
5. Click **Save**. Potential details are displayed in the *Potential: < Potential Name>* page where you can perform the additional operations.

Importing Potentials

(Access Privilege: Data Import permission)

You can migrate your potentials from other CRM and Account Management applications. Before migrating data, you must convert the data into CSV/XLS format. Import link is displayed only if you have privilege to use Import feature. Please contact your administrator in case import link is disabled.

Tips

- Before importing potentials into Zoho CRM, you must have the potentials details in a CSV/XLS file.
- You must have privilege to import the potentials in Zoho CRM.
- Before importing the potentials into Zoho CRM close the CSV/XLS file and the Spreadsheet program.
- Remove apostrophe any place in the CSV file (For example, ABC's).
- You can import a maximum of 1000 potentials in one import cycle.

To import potentials

1. Click the **Potentials** tab.
2. In the *Potentials: Home* page under *Potential Tools* section, click the **Import My Potentials** or **Import My Organization Potentials** button.
3. In the *Specify Import File:* page, browse the Potentials-related import file (CSV/XLS format) and then click the **Next** button.
4. In the *Fields Mapping* page, map the CSV/XLS column header with potential fields in Zoho CRM.
5. Click the **Import** button. It will take a few seconds to complete the importation.
6. In the *Potentials: Home* page, imported potentials are displayed under the *Potentials List* section. You can continue the importation further or complete the operation.

Associating Potential with Other Records

(Access Privilege: Read/Write permissions)

You can create a 360-degrees view of the potential to display all the associated details, such as open activities, history of the completed activities, contacts, products, sales stage history, attachments, and notes.

To associate potential with other records

1. In the *Potential* page, you can update the following details:
    - o **Sales Stage History:** To display the history of the sales stage.
    - o **Competitors:** To associate competitors to the potential.
    - o **Contact Roles**: To select contacts associated to the potential.
    - o **Open Activities:** To create tasks and events.
    - o **Closed Activities:** To display the completed tasks and events.
    - o **Products:** To add products to the potential.
    - o **Quotes:** To create quote for the potentials.
    - o **Sales Orders:** To create sales order for the potential.
    - o **Invoices:** To create invoices for the potential.
    - o **Attachments:** To attach documents to the potential.
    - o **Notes:** To add notes to potential.
2. After updating the associated records, you can move to the next record.

Associating Competitors with Potential

(Access Privilege: Manage Competitor permission)

Most of the companies prefer to purchase products after analyzing the track of the different vendors. If you are working with a highly competitive market, where your competitors are directly competing with you in winning the deals, it is always better to know their strengths and weaknesses well in advance so that you can propose your offering in a better way.

In the competitor page, you can add the competitor's strengths and weaknesses.

To associate competitors with potential

1. Click the **Potentials** tab.
2. In the *Potentials: Home* page under *Potential List* section, select the required potential.
3. In the *Potential Details* page under *Competitors* section, click the **New** button.

4. In the *Competitor* page, under *Competitor Information* section do the following:
   o **Competitor Name:** Specify the company name of the competitor. This is a mandatory field
   o **Website:** Specify the URL of the competitor website.
   o **Strengths:** Specify the strengths of the competitor's offering.
   o **Weaknesses:** Specify the weaknesses of the competitor's offering.
5. Click **Save**.

Adding Contact Roles to Contacts

(Access Privilege: Read/Write permissions)

While prospecting, you may need to contact different persons (contacts) to finalize the sales deal. It is always better to know the contact's role in your prospecting organization, so that always you have a right discussion with the right persons. For example, explaining about product price and discounts is always better with Financial Manager where as product features with the Product Manager. This kind of approach helps you to negotiate with the prospecting organization in a better way and cut short the sales lead-time.

To add contact roles to contacts

1. Click the **Potentials** tab.
2. In the *Potentials: Home* page under *Potential List* section, select the required potential.
3. In the *Potential Details* page under *Contact Roles* section, list of contacts associated with potential are displayed. Click the **Add Role** button.
4. In the *Contact Roles Mapping* page, for each contact select the role from the **Contact Role** drop-down list.
5. Once you have completed associating roles to all the contacts, click **Save**.

Customizing Contact Roles

(Access Privilege: Contact Role permission)

By default, some of the contact roles, such as Decision Maker, Product Management, Purchasing and other roles are available. You can customize the contact roles according to your business process.

Note: Users with "Administrator" privilege can customize the contact roles. Please contact your System Administrator in case you need some additional roles.

To add/modify contact roles

1. Click the <u>Setup</u> link.
2. In the *Setup* page under the *Potential Settings* section, click the <u>Contact Roles</u> link.
3. In the *Edit Contact Roles* page, do the following:
   o Click the <u>Add Role</u> link to add a new role.
   o Click the <u>Delete Role</u> link after selecting the role(s) to delete roles.
   o Modify the existing roles from the **Contact Role** text box.
4. Once you have completed updating the contact roles click **Save**.

Changing Potential Owner

(Access Privilege: Read/Write permissions)

When the prospecting is in progress, occasionally it may be very useful to change the owner of some of the potentials in a single step. You can change the owner of an individual potential or a group of potentials.

To change owner of potentials individually

1. Click the **Potentials** tab.
2. In the *Potentials: Home* page, select the potential.
3. In the *Potential: <Potential Name>* page, click the **Edit** button.
4. In the *Potential: <Potential Name>* page, change the potential owner from the **Potential Owner** lookup field.
5. Click **Save** to update the potential owner.

To change owner of potentials in bulk

1. Click the **Potentials** tab.
2. In the *Potentials: Home* page, go to the **Potential List** section and select the check boxes corresponding to the potentials. You can also select all the potentials.
3. Click the **Change Owner** button.
4. In the *Potentials: Change Owner* page, select the user from the **Select New Owner** pick list and click the **Update Owner** button to change the owner of the potentials permanently.

> ⚠️**Warning:** Potentials ownership will be changed to another user, irrespective of its existing owner. Use this operation carefully, otherwise potentials belonging to different users will be changed to new user. To overcome this problem, first you may search the

potentials with a required owner name then change the owner in bulk.

Exporting Potentials

(Access Privilege: Data Export permissions)

Occasionally, it is very useful to export the potentials from the Zoho CRM system to a spreadsheet programs for further data analysis.

To export potentials to external sources

1. Click the **Potentials** tab.
2. In the *Potentials: Home* page under the *Potential Tools* section, click the **Export All Potentials** button.
3. In the *File Download* pop-up dialog, click **Save** to save the Potentials files in *.CSV file format

Printing Potential Details

You can view a printable form and print the potential details using browser's Print function.

To print potential details

1. Click the **Potentials** tab.
2. In the *Potentials: Home* page, under the *Potential List* section, select the required potential.
3. In the *Potential: <Potential Name>* page click the **Printable View** button.
4. In the *Potential: <Potential Name>* page, click the **Print Page** button to print the document.

Viewing Reports

(Access Privilege: Read permission)

You can directly access some of the standard reports pertaining to potentials from the *Potentials Reports* section. By default, the following reports are displayed under Potentials module:

- Pipeline by Stage
- Potentials Closing by this Month

- Sales Person's Performance Report
- Lost Potentials
- Potentials by Type
- Open Potentials
- Pipeline by Probability
- Sales By Lead Source
- This month sales
- Today's Sales

To view potentials report

1. Click the **Potentials** tab.
2. In the *Potentials: Home* page under the *Potentials Reports* section, click the required report link.
3. The report is displayed in *Reports* page, which can be further customized as per your requirements.

Deleting Potentials

(Access Privilege: Read/Write/Delete permissions)

Rarely, you may need to remove the unnecessary potentials, which are lost. This helps you manage your potentials in a better way. You can delete potentials either individually or in bulk.

⚠️**Warning:** The deleted potentials are temporarily stored in Recycle Bin. If required you can restore the deleted potentials again. However, if you delete potentials from Recycle Bin, you cannot restore again.

To delete potentials individually

1. Click the **Potentials** tab.
2. In the *Potentials: Home* page, select the potential to be deleted.
3. In the *Potential: <Potential Name>* page, click **Delete**.
4. In the *Confirmation* dialog, click OK to delete the potential permanently.

To delete potentials in bulk

1. Click the Potentials tab.
2. In the *Potentials: Home* page, under the *Potential List* section, select the potentials to be deleted using **Select Potentials** check box (first column).

3. Click the **Mass Delete** button.
4. In the *Confirmation* dialog, click **OK** to delete the selected potentials permanently.

Customizing Potentials Module

(Access Privilege: Customize ZohoCRM.com permission)

Customization of the Potentials module includes, renaming the tab name, modifying the pick list values in standard fields, adding new custom fields, modifying Potential page layout, and show/hide the related list views according to your Sales management process requirements.

For more details, refer to *Customizing Zoho CRM*

Setting up Big Deal Alert

You can use the Big-deal Alert function to notify your management/Colleagues if there is a chance of winning a big deal, which you wish to share the good news with them. Sometimes executive board members may be interested to know all the Big-deal information well in advance. You can send the Big-deal alert as an e-mail notification to all the Zoho CRM users/selected users and colleagues not registered as Zoho CRM users.

To configure big deal alert

1. Click the Setup link.
2. In the *Setup: Home* page, under *Potentials Settings* section, click the Big Deal Alert link.
3. In the *Workflow Rule* page, do the following:
    4.
    o   In the *Rule Edit* section, the **Big Alert rule** details are displayed. The default criteria is "Amount >= 1000 and the probability = 100". You can change the Amount and Probability by editing the existing criteria.
    o   In the *Related Alerts* section, the Alert details are displayed. The default alert is "Select the Big Deal E-mail template and send to all the users in Zoho CRM". You can change the Alert details by editing the existing alert.
    o   In the *Related Tasks* section, you can add tasks for the Big deal Alert rule.

For more details, refer to *Chapter 25: Managing Workflow*

Configuring Sales Stage Pick list

You can modify the default stage for new and converted leads.

To configure Sales Stage Pick list

1. Click the Setup link.
2. In the *Setup: Home* page, under *Potentials Settings* section, click the Field List link.
3. In the *Potentials List* page, edit the **Sales Stage** field.
4. In the *Edit Pick List* page, add/modify values in the **Values** list box. Once you have updated the pick list values you can sort the values alphabetically and use the first values as the default pick list value.
5. Click **Save**.

Mapping Stage and Probability Values

Sales Stage is very important criteria to identify the performance of organization-wide Sales pipeline. In the Stage-Probability mapping page, you can perform the following operations:

- Create different types of Sales stages according to your organization-wide Sales process
- Associate Probability values to the Sales stages
- Associate Forecast types (Open, Closed-won, or Closed-lost) to Sales stages
- Associate Forecast categories (Pipeline, Closed, Omitted, Best Case, Committed) - For more details refer to Chapter 7: Managing Sales Forecasts

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Tips:

- For a better sales pipeline analysis assign different probabilities to sales stage values.
- For each stage, assign probability in the range of 0 to 100.
- You may consider using probability value as 100 when the deal is closed-won and 0 for deal closed-lost.

To map stage and probability values

1. Click the Setup link.
2. In the *Setup: Home* page, under *Potentials Settings* section, click the Stage-Probability Mapping link.
3. In the *Stage-Probability Mapping* page, do the following:
   o Add the **Sales Stage** and the corresponding **Probability** of closing the sales deal
   o Delete **Sales Stage** and assign the existing **Probability** to another Sales Stage value
   o To modify the existing Sales Stages, use the **Replace** option.

4. Click **Save**.

To map sales stage and forecast type

1. Click the Setup link.
2. In the *Setup: Home* page, under *Potentials Settings* section, click the Stage-Probability Mapping link.
3. In the *Stage-Probability Mapping* page, do the following:
   o Add the **Sales Stage** and the corresponding **Forecast Type**
   o Delete **Sales Stage** and assign the existing **Forecast Type** to another Sales Stage value.
4. Click **Save**.

To map sales stage and forecast category

1. Click the Setup link.
2. In the *Setup: Home* page, under *Potentials Settings* section, click the Stage-Probability Mapping link.
3. In the *Stage-Probability Mapping* page, do the following:
   o Add the **Sales Stage** and the corresponding **Forecast Category**
   o Delete **Stage Stage** and assign the existing **Forecast Category** to another Sales Stage value.
4. Click **Save**.

Working with Forecasts

Forecasting provides real-time insight for tracking the sales numbers against quotas, probabilities, plans, etc., which helps organization to fine-tune the organization-level sales process. For sales mangers, forecast feature provides an overall picture of company sales pipeline, as well as those of each individual sales staff performance. Sales Representatives can use forecasting to meet/exceed quotas assigned to them and in turn increase company profits.

Note: In Zoho CRM, you cannot consolidate the individual sales persons' forecasts and provide the organization-wide forecast.

You can perform the following operations in **Forecasts** module:

- Navigate forecasts
- Search forecasts (Alphabetical or Advanced search options)
- Create list views
- Create new forecasts (Form filling, quick create, or duplicate options)
- Associate forecast with other records
- View forecast reports
- Delete forecasts (individually or in bulk)

Navigating Forecasts

(Access Privilege: Read permission)

You can navigate the forecasts according to the status of the forecasts.

To navigate forecasts

1. Click the **Forecasts** tab.
2. In the *Forecasts Home* page, under the **Forecast List** section, select one of the views from **Select View** drop-down list to display the list of forecasts according to the status of the forecasts (For example, Contacted, Hot, Won, and others).
3. In the **Forecast List** section, click the Start, Previous, Next, or End links to access the respective list of forecasts.

Searching Forecasts

(Access Privilege: Read permission)

You can search forecasts alphabetically are filling the required information in Search box.

To search forecasts

1. Click the **Forecasts** tab.
2. In the *Forecasts Home* page, under *Search* section, do one of the following:
    3.
    o   Specify the search criteria in the **Search** field and click the **Go** button. Or
    o   Select one of the alphabetical search links.

3. In the *Forecast List* page, a list of forecasts is displayed as per search criteria.

Creating List Views

(Access Privilege: Read/Write permission)

In the *Forecast List* you can create/modify/delete the custom views, sort columns in the list view (ascending/descending order), search the records available in the current list view. In addition, you can modify some of the columns in standard list views. By default, the following standard list views are available in the Forecasts module:

*   All Forecasts
*   My Forecasts

Note: User created list views are displayed under **User Created Views** category in **View** drop-down list.

To create custom views

1. Click the **Forecasts** tab.
2. In the *Forecasts Home* page, under *Forecast List* section, click the Create View link.

    Note: Under the *Forecast List* section, some of the standard list views are displayed. You can only rearrange the order of the columns and add more columns.

3. In the *Create New View* page, do the following:

- In the *View Information* section, specify name of the custom view in the **View Name** (mandatory) field. The custom view name appears in the View drop-down list. You can also set the custom view as a default list view by selecting the **Set as Default View** check box.
- In the *Specify Criteria* section, specify the filter criteria. For more details, refer to the [Specifying List View Criteria](#) section.
- In the *Choose Columns* section, select the columns to be displayed in the List View. For more details, refer to the [Selecting List View Columns](#) section.
- In the *Accessibility Details* section, select the users to whom custom list view has to be enabled. For more details, refer to the [Enabling View Access](#) section.

4. Click **Save**. The custom list view is displayed in the View drop-down list.

Creating Forecasts

(Access Privilege: Read/Write permission)

In Zoho CRM, you can create forecasts for a financial year and for each quarter by entering data manually in forecast details.

If you have already created forecast for a specific quarter, you cannot create forecast for the same quarter. For example, first, you have created a forecast for the Quarter 1 in Year 2006, and then you cannot create a new forecast in the same quarter. You can only modify the existing quarter details.

Note: You cannot customize the fields in forecast module.

List of Standard Forecast-related Fields

In the *Forecast: Edit* form, you need to specify the forecast-related information. The following table provides descriptions of the various standard fields in the form.

Field Name	Description	Data Type
Year*	Select the fiscal year from the drop-down list.	Pick list
Quarter*	Select the quarter of the fiscal year.	Pick list
Month	Display the month of the selected quarter.	Month
Quota	Specify the quota for the month.	Currency
Closed	Display the amount from the closed won potentials.	Currency
Commit Amount	Specify the total amount a sales person confident of closing during forecast period.	Currency

Field Name	Description	Data Type
Best Case Amount	Specify the amount a sales person might be closing. This amount can be either more or less than Commit Amount.	Currency
Pipeline	Displays the amount in the sales pipeline.	Currency
Owned By	Displays the owner of the forecast.	Lookup
Created By	Displays the person created the forecast first time.	Date/Time
Last Modified By	Displays the person modified the forecast.	Date/Time

By default, the person who creates the forecast owns the forecast. If you want to assign the forecast to a different user, select the user name from the **Change Owner** field in the forecast details view.

To create forecasts

1. Click the New Forecast link.
2. In the *New Forecast:* page, select the mandatory forecast-related fields, such as **Year** and **Quarter**.

> **Note:** The **Year** and **Quarter** fields are mandatory. Refer to the List of Standard Forecast-related Fields section for more details.

3. Click **Save**. Forecast details for the three months and forecast history are displayed in the forecast details page.

Associating Forecasts with Other Records

(Access Privilege: Read/Write permissions)

After creating forecasts, you can add potentials in each month. Once the potential is closed, it is automatically displayed under forecast history. All the potentials created/followed-up are displayed under sales person's monthly forecast list.

To associate forecast with other records

1. In the *Forecast: <Forecast Name>* page, you can update the following details:
   2.
      o **Months list Potentials:** To display the potentials in each month. You can also add new potential to the month.

o **Forecast History:** To display the historical data of the forecasts.

2. After updating the associated records, you can move to the next record.

Viewing Reports

(Access Privilege: Read/Write permission)

You can directly access some of the standard reports pertaining to forecasts from the *Forecasts Reports* section. By default, the following reports are displayed under Forecasts module:

- Quarterly Sales Forecast
- Forecast History

To view forecast report

1. Click the **Forecasts** tab.
2. In the *Forecasts: Home* page under the *Forecasts Reports* section click the required report link. The report is displayed in *Reports* page, which can be further customized as per your requirements.

For more details about reports customization, refer to *Chapter 19: Working with Reports*.

Deleting Forecasts

(Access Privilege: Read/Write/Delete permission)

Occasionally you may need to remove some of the unnecessary forecasts from the Zoho CRM system for a better user experience. You may consider removing forecasts that are not useful for future reference.

⚠️**Warning:** The forecast details are deleted permanently, hence use the delete operation carefully.

To delete forecasts individually

1. Click the **Forecasts** tab.
2. In the *Forecasts: Home* page under the *Forecast List* section, select the forecast.
3. In the *Forecast: <Forecast Name>* page, click the **Delete** button.

4. In the *Confirmation* dialog, click **OK** to remove the forecast permanently.

To delete forecasts in bulk

1. Click the **Forecasts** tab.
2. In the *Forecasts: Home* page under the *Forecast List* section, select the check boxes corresponding to the forecasts to be removed.
3. Click the **Delete** button.
4. In the *Confirmation* dialog, click **OK** to remove the selected forecasts permanently.

Working with Cases

In the Internet world, online [Customer Support](#) became an integral part of the organizations' business process. [Customer Support](#) is becoming an important activity in retaining all types of products and service industries. In general cases (trouble tickets) are used to capture the customer feedback on various types of problems arises after purchasing product/service from your company. Sometimes customers may provide some good feature requests, which can be useful during future product/service enhancements.

Typical Case Management Process

1. Customize the fields in Case page according to your organization [Customer Support](#) process (You may use the existing fields, disable some of the fields, or add new custom fields).
2. Setup case generation process by filling the Case form, importing cases data from external sources, or capturing cases directly from Website using Web-to-Case form.
3. Assign cases to the correct users using the workflow rules.
4. Follow-up cases until resolutions are sent to the customers.
5. Once the resolution is working fine, add the solution to the publicly accessible Solutions module for future reference.

In Zoho CRM, cases can be generated through telephone, E-mail, or Website. In addition, you can also generate cases from customer specific E-mails in Microsoft Outlook using the Zoho CRM Outlook Edition. Refer to Chapter 28: [Working with Outlook Edition](#).

The Cases home page contains,

- Cases List
- Case Reports
- Tools, such as Import, Export, mass transfer, and delete cases
- Quick Create pane
- Search
- Alphabetical Search
- Custom Views
- Change Owner
- Delete
- Page Navigation

You can perform the following operations in *Cases* module:

- [Navigate cases](#)
- [Search cases](#) (Alphabetical or advanced options)
- [Create List views](#)
- [Create cases](#) (Form filling, quick create, or duplicate options)
- [Associate cases with other records](#)
- [Import cases](#) (individual/Organizational)
- [Change case owners](#) (individually or in bulk)
- [Export cases](#)
- [Print cases details](#)
- [View case reports](#)
- [Delete cases](#) (individually or in bulk)
- [Customize cases](#)
- [Capture cases from Website](#) (using Web-to-Case form)
- Track cases through Email

Navigating Cases

(Access Privilege: Read permission)

You can navigate cases available in the *Cases List*.

To navigate cases

1. Click the **Cases** tab.
2. In the *Cases Home* page, go to the **Cases List** section and select one of the views from **Select View** drop-down list to display the list of Cases according to the priority of the Case (For example, Low, Medium, High, and others).
3. In the **Cases List** section, click the <u>Start</u>, <u>Previous</u>, <u>Next</u>, or <u>End</u> link to access the respective list of cases.

Searching Cases

(Access Privilege: Read permission)

You can search the cases alphabetically or filling the required information in Search box.

To search cases

1. Click the **Cases** tab.
2. In the *Cases Home* page, under *Case Search* section, do one of the following:

3.
   o Specify the search criteria in Search box and click the **Go** button. Or
   o Select one of the alphabetical search links.

3. In the *Case List* page, a list of cases is displayed as per search criteria.

Creating List Views

(Access Privilege: Read/Write permission)

In the *Case List* you can create/modify/delete the custom views, sort columns in the list view (ascending/descending order), search the records available in the current list view. In addition, you can modify some of the columns in standard list views. By default, the following standard list views are available in the Cases module:

- All Cases
- My Cases
- Today Cases
- Open Cases
- Closed Cases
- Escalated Cases

Note: User created list views are displayed under **User Created Views** category in **View** drop-down list.

To create custom views

1. Click the **Cases** tab.
2. In the *Cases Home* page, under *Case List* section, click the Create View link.

> **Note:** Under the Case List section, some of the standard list
> views are displayed. You can only rearrange the order of columns
> and more columns.

3. In the *Create New View* page, do the following:
   o In the *View Information* section, specify name of the custom view in the **View Name** (mandatory) field. The custom view name appears in the View drop-down list. You can also set the custom view as a default list view by selecting the **Set as Default View** check box.

- In the *Specify Criteria* section, specify the filter criteria. For more details, refer to the Specifying List View Criteria section.
- In the *Choose Columns* section, select the columns to be displayed in the List View. For more details, refer to the Selecting List View Columns section.
- In the *Accessibility Details* section, select the users to whom custom list view has to be enabled. For more details, refer to the Enabling View Access section.
4. Click **Save**. The custom list view is displayed in the View drop-down list.

Creating Cases

(Access Privilege: Read/Write permissions)

In Zoho CRM, you can create cases by:

- Entering data manually into case details form
- Importing cases from external sources
- Capture cases from Website through Web-to-Case form
- Adding customer-specific e-mail message as case from Microsoft Outlook to Cases module

In the *Case: Edit* form, you need to specify the case-related information. The following table provides descriptions of the various fields in the form.

List of Standard Case-related Fields

Field Name	Description	Data Type
Case Number	Display the case ID after creating a case.	Number
Case Owner	Select the name of the Zoho CRM user to whom the Case is assigned.	Lookup
Subject*	Specify the title of the Case. This field is mandatory.	Text box, Alphanumeric (255)
Priority	Select the priority of the Case from the drop-down list.	Pick list
Status	Select the status of the Case from the drop-down list.	Pick list
Category	Select the category of the Case from the drop-down list.	Pick list
Reported By	Displays the name of the contact.	-
Related To	Select the name of the contact who submitted the	Lookup

Field Name	Description	Data Type
	Case.	
Type	Select the type of problem. It can be a general question, feature request, or real issue in your product/service.	Pick list
Case Origin	Select the source from which the case has been generated. You can select Email, Phone, or Website. If you select Email, you must specify the Email ID of the customer.	Pick list
Email	Specify the Email ID of the contact.	Email
Phone	Specify the phone number of the customer	Textbox
Case Reason	Specify the reason for the case	Pick list
No of comments	Display the number of comments submitted during case resolution.	-
Description	Specify complete details about the case.	Text Area (32 KB)
Comments	Specify follow-up notes about case.	Text Area (32 KB)

To create cases

1. Click the <u>New Case</u> link.
2. In the *Case:* page, enter the details.

   Note: Case Title is a mandatory field. Refer to the <u>List of Standard Case-related Fields</u> section for more details.
3. Click **Save** to save the Case details. Case details are displayed in *Case: <Case Name>* page where you can perform the additional operations. Refer to the <u>Associating cases with Other Records</u> section for more details.

To create cases instantly

1. Click the **Cases** tab.
2. In left hand-side under the **New Case** section, specify the mandatory details, such as Status, Case Origin, and Subject.
3. Click **Save**. Case details are displayed in the *Case: < Case Name>* page where you can update the additional details or perform the additional operations.

To create duplicate cases

1. Click the **Cases** tab.

2. In the *Case List* view page, select the Case to be duplicated.
3. In the *Case: < Case Name>* page, click the **Clone** button.
4. In the *Edit: < Case Name>* page, modify some of the Case-related details.
5. Click **Save**. Case details are displayed in the *Case: <Case Name>* page where you can perform the additional operations.

Importing Cases

(Access Privilege: Data Import permission)

You can import cases from other Help Desk and CRM applications to the Zoho CRM system for a better integration of your organization-wide sales and customer support processes.

Tips

- Before importing cases into Zoho CRM, you must have the cases details in a CSV/XLS file.
- You must have privilege to import the cases in Zoho CRM.
- Before importing the cases into Zoho CRM close the CSV/XLS file and the Spreadsheet program.
- Remove apostrophe any place in the CSV file (For example, ABC's).
- You can import a maximum of 1000 cases in one import cycle.

To import cases from external sources

1. Click the **Cases** tab.
2. In the *Cases: Home* page under *Case Tools* section, click the **Import My Cases** button.
3. In the *Import My Cases Wizard* page, browse the Cases-related data (CSV/XLS format) and then click the **Next** button.
4. In the *Fields Mapping* page, map the CSV/XLS column header with case fields in Zoho CRM.
5. Click the **Import** button. It will take a few seconds to complete the importation.
6. In the *Cases: Home* page, imported cases are displayed under the *Cases List* section. You can continue the importation further or complete the operation.

Associating Cases with Other Records

(Access Privilege: Read/Write permissions)

You can create a 360-degrees view of the Case to display all the associated details, such as potentials, cases, open activities, history of the completed activities, attachments, and notes.

To associate cases with other records

1. Click the **Cases** tab.
2. In the *Cases Home* page, under the *Case List* section, select the required Case.
3. In the *Case: <Case Name>* page, you can perform the following operations:
    o   Edit the Case details.
    o   Create activities, such as events and tasks related to case
    o   Attach documents and notes
4. Close the case page once all the required information is updated for the case.

Exporting Cases

(Access Privilege: Data Export permission)

Occasionally it is very useful to export the cases from Zoho CRM to Spreadsheet programs, such as Microsoft Excel, OpenOffice, and others for further data analysis.

To export cases to external sources

1. Click the **Cases** tab.
2. In the *Cases: Home* page under the *Case Tools* section, click the **Export All Cases** button.
3. In the *File Download* pop-up dialog, Click **Save** to save the cases details in CSV/XLS file format.

Changing Case Owner

(Access Privilege: Read/Write permission)

You can change the owner of an individual case or a group of cases to other users.

To change owner of cases individually

1. Click the **Cases** tab.
2. In the *Cases: Home* page, select the case.
3. In the *Case: <Case Name>* page, click the **Edit** button.

4. In the *Case: <Case Name>* page, change the case owner from the **Case Owner** lookup field.
5. Click **Save** to update the case owner.

To change owner of cases in bulk

1. Click the **Cases** tab.
2. In the *Cases: Home* page, go to the **Case List** section and select the check boxes corresponding to the cases. You can also select all the cases.
3. Click the **Change Owner** button.
4. In the *Cases: Change Owner* page, select the user from the **Select New Owner** pick list and click the **Update Owner** button to change the owner of the cases permanently.

Note: Cases ownership will be changed to another user, irrespective of its existing owner. Use this operation carefully, otherwise cases belonging to different users will be changed to new user. To overcome this problem, first you may search the cases with a required owner name then change the owner in bulk.

Printing Case Details

(Access Privilege: Read permission)

You can view a printable form and print the Case details using browser's Print function.

To print case details

1. Click the **Cases** tab.
2. In the *Cases: Home* page, under the **cases List** section, select the required Case.
3. In the *Case: <Case Name>* page click the **Printable View** button.
4. In the *Case: <Case Name>* page, click the **Print Page** button to print the document.

Viewing Case Reports

(Access Privilege: Read/Write permission)

You can directly access some of the standard reports pertaining to cases from the *Case Reports* section. By default, the following reports are displayed under Cases module:

- Cases By Origin
- Cases By Status

- Cases By Priority
- Cases By Comments

To view case report

1. Click the **Cases** tab.
2. In the *Cases: Home* page, go to the **Case Reports** section.
3. Click the required report link. The report is displayed in *Reports* page, which can be further customized as per your requirements.

Deleting Cases

(Access Privilege: Read/Write/Delete permissions)

Rarely, you may need to remove the unnecessary cases, which are not tracked further. This will help you manage your cases in a better way. You can delete cases either individually or in bulk.

Note: The deleted cases are temporarily stored in Recycle Bin. If required you can restore the deleted cases again. However, if you delete cases from Recycle Bin, you cannot restore again.

To delete cases individually

1. Click the **Cases** tab.
2. In the *Cases: Home* page, select the Case to be deleted.
3. In the *Case: < Case Name>* page, click **Delete**.
4. In the *Confirmation* dialog, click **OK** to delete the case permanently.

To delete cases in bulk

1. Click the **Cases** tab.
2. In the *Cases: Home* page, under the *cases List* section, select the cases to be deleted using the **Select** check box (first column).
3. Click the **Mass Delete** button.
4. In the *Confirmation* dialog, click **OK** to delete the selected cases permanently.

Customizing Cases

(Access Privilege: Customize ZohoCRM.com permission)

Customization of the cases module includes, renaming the tab name, modifying the pick list values in standard fields, adding new custom fields, modifying case page layout, and show/hide the related list views according to your Case management process requirements.

Capturing Cases from Website (Web-to-Case form)

(Access Privilege: Customize ZohoCRM.com permission)

Using Web-to-Case form your organization can allow Website visitors submitting cases directly to the **Cases** module. All the cases captured through Website are first assigned to the Customer Support Administrator, which can be reassigned to the corresponding Support persons.

Important Points

- Anyone visiting your Web site can submit cases and submit any type of information. Hence, you cannot control the Spam.
- All the cases are first assigned to the User selected in Web-to-Case settings page. The Customer Support Administrator can change the case ownership to other users.
- Contacts are automatically created if you have enabled **Web to Contacts** option in the Web-to-Case settings.
- To send automate replies to visitors select the required e-mail template from the Web-to-Case settings.
- The generated Web-to-Case form contains only Web form related tags. You have to customize the generated case form further to suite your Website requirements.
- Test the complete workflow of Web-to-Case form, before publishing in the Website.

To create Web-to-Case form

1. Click the Setup link.
2. In the *Settings Home* page, under the *Case Settings* section click the Web-to-Case link.
3. In the *Capturing Cases from Website* page, do the following:
4. Enable **Web-to-Case** option for your organization: Refer *To configure web-to-case settings* section.
5. Set up **Custom Case Fields** in Web-to-Case form: Refer To add custom case fields in Web-to-Case form section.
6. **Generate HTML page** as per your fields in the Web-to-Case form: Refer To generate HTML page for Web-to-Case form section.
7. The generated HTML page contains only the web form objects and minimal HTML tags. Customize the web page according to your Website layout requirements.

8. Publish the Web-to-Case form in your Website. Your Web site visitors can submit cases/feedback, which will be routed to Cases module. All the cases captured through web form are assigned to the Owner selected in Web-to-Case settings page.

To configure Web-to-Case settings

1. In the *Capturing Cases from Website* page, click the <u>Web-to-Case</u> link.
2. In the Web-to-Case Settings page do the following:
3. **Enable Web-to-Case:** Select the check box the enable the Web-to-Case form.
4. **Return URL:** Specify the URL of the page to be displayed after visitor submits the case (For example, Thanks page for submitting the information)
5. **Default Case Owner/Creator:** Specify the Zoho CRM user to whom the case has to be assigned.
6. **Web to Contacts:** Enable this option to create contact upon submitting the case. Contact Name and Email are mandatory fields, which are added to Web-to-Case form.
7. **Default Response Template:** Select the automate e-mail response template, which is used for sending an e-mail to the person submits the case.
8. Click **Save**. Again, Capturing Cases from your Web Site page is displayed. Next go to Next Step.

To add custom case fields in Web-to-Case form

1. In the *Capturing Cases from Website* page, click the <u>Setup Custom Case Fields</u> link.
2. In the Case Fields section, add the custom fields to be added. For more details, refer to *Chapter 24: Customizing Zoho CRM*
3. Once you have completed the field customization, click the <u>Web-to-Case</u> link under *Case Settings* section.

To generate HTML page for Web-to-Case form

1. In the *Capturing Cases from Website* page, click the <u>Generate the HTML</u> link.
2. In the *Generating HTML for Web-to-Case* page, do the following:
3. Select Web Form Fields: Select the case fields to be displayed in the Web Form.
4. **Confirm Password:** Specify your password (User who creates the Web-to-Case form) to authenticate your Account from the Zoho CRM on-demand service.
5. Click the **Generate HTML** button.
6. In the *Copy Generated HTML* page, copy the HTML content and paste to your favorite HTML editor and click Finish button.
7. Customize the Web-to-Case form (HTML page) to suite your Website requirements and publish in your Website.

> ✎**Warning:** If you change your password after publishing the Web-to-Case form, please ensure that updating the following information in Web-to-Case form.
>
> **Example:**
>
> ```
> <!-- Begin: Do not edit the section -->
> <form action="http://zohocrm.com/crm/WebtoCaseServlet?encoding=UTF-8" method="POST">
> <input type='hidden' name='orgId' value='1'/>
> <input type='hidden' name='xnQsjsdp' value=Z29wYWxzQGFkmVudG5ldC5jb20=/>
> <input type='hidden' name='xmPqMMnsd' value=dGVzdGl0/>
> <input type='hidden' name='actionType' value=Q2FzZXM=/>
> <input type='hidden' name='returnURL' value='http://www.zohocrm.com' />
> <!-- End: Do not edit the section -->
> ```
>
> Otherwise, cases submitted through Website will not be captured in Cases module, due to authentication failure.

Managing Email-bases Cases

With the rapid growth of Internet and related technologies, Email has emerged as one of the most important media for the customer support. Email-based case management helps Zoho CRM customers is easy to use and track all the customer-specific cases in a consolidated

Frequently Asked Questions

1. What are all the various sources of cases?

Ans: In Zoho CRM, cases can be generated from different customer touch-points, such as phone, e-mail, and website. You can create a case based on telephonic conversation with your customer, add the customer-specific e-mail message as case from Microsoft Outlook Mail client using Outlook Edition, or capture from the Website using Web-to-Case form.

2. Is it possible to send replies to the customer queries from the Cases module?

Ans: You cannot send replies to the customers from Cases module.

3. I have published Web-to-Case form for my organization. However, my cases submitted by my Website visitors are not captured in Cases module. Why it is happening?

Ans: You may not be able to capture cases properly if:

- Password is changes after publishing the Web-to-Case form.
- Removed some of the necessary Web form action entries in your HTML page while customizing the Web-to-Case form.

Working with Solutions

Over a period, direct customer support helps your organization to build a rich knowledge Base for future reference. Knowledge Base in the form of solutions (also called as articles or frequently asked questions) enables your organization in solving the repetitive problems encountered by customers with limited resources. Solutions module integrated with Cases is very useful for organizations that are mainly focusing on post-sales support, particularly technology and knowledge-based industries.

The Solutions home page contains,

- Solutions List
- Solution Reports
- Tools, such as Import, Export, mass transfer, and delete solutions
- Quick Create pane
- Search
- Alphabetical Search
- Custom Views
- Change Owner
- Delete
- Page Navigation

You can perform the following operations in *Solutions* module:

- Navigate Solutions
- Search Solutions
- Create List views
- Create solutions
- View solutions list
- Attach documents to the solution
- Import solutions
- Export solutions
- Print solution details
- Change solutions Owners (individually or in bulk)
- Delete solutions (individually or in bulk)
- Customize Solutions

Navigating Solution

(Access Privilege: Read permission)

You can navigate cases available in the *Solution List*.

To navigate solutions

1. Click the **Solution** tab.
2. In the *Solution Home* page, go to the **Solution List** section and select one of the views from **Select View** drop-down list to display the list of Solution according to the priority of the Case (For example, Low, Medium, High, and others).
3. In the **Solution List** section, click the <u>Start</u>, <u>Previous</u>, <u>Next</u>, or <u>End</u> link to access the respective list of solutions.

Searching Solution

(Access Privilege: Read permission)

You can search the solutions alphabetically or filling the required information in Search box.

To search solutions

1. Click the **Solution** tab.
2. In the *Solution Home* page, under *Solution Search* section, do one of the following:
   3.
      o Specify the search criteria in Search box and click the **Go** button. Or
      o Select one of the alphabetical search links.

3. In the *Solution List* page, a list of solutions is displayed as per search criteria.

Creating List Views

(Access Privilege: Read/Write permission)

In the *Solution List* you can create/modify/delete the custom views, sort columns in the list view (ascending/descending order), search the records available in the current list view. In addition, you can modify some of the columns in standard list views. By default, the following standard list views are available in the Solutions module:

- All Solutions
- My Solutions
- Published Solutions

> *Note:* User created list views are displayed under **User Created Views** category in **View** drop-down list.

To create custom views

1. Click the **Solutions** tab.
2. In the *Solutions Home* page, under *Solution List* section, click the Create View link.

> *Note:* Under the Solution List section, some of the standard list views are displayed. You can only rearrange the order of columns and more columns.

3. In the *Create New View* page, do the following:
    - In the *View Information* section, specify name of the custom view in the **View Name** (mandatory) field. The custom view name appears in the View drop-down list. You can also set the custom view as a default list view by selecting the **Set as Default View** check box.
    - In the *Specify Criteria* section, specify the filter criteria. For more details, refer to the Specifying List View Criteria section.
    - In the *Choose Columns* section, select the columns to be displayed in the List View. For more details, refer to the Selecting List View Columns section.
    - In the *Accessibility Details* section, select the users to whom custom list view has to be enabled. For more details, refer to the Enabling View Access section.
4. Click **Save**. The custom list view is displayed in the View drop-down list.

Creating Solutions

(Access Privilege: Read/Write/Delete permission)

In the *Solutions: Edit* form, you need to specify the Solutions-related information. The following table provides descriptions of the various fields in the form.

List of Standard Solutions Fields

Field Name	Description	Data Type
Solution Title*	Specify the subject of the solution.	Text box, Alphanumeric (255)
Solution Owner	Select the Zoho CRM user's name to which the solution is assigned.	Pick list

Field Name	Description	Data Type
Product Name	Select the name of the product to which the solution has to be associated.	Lookup
Category	Select the category of the solution.	Text box, Alphanumeric (255)
Question*	Select the priority of the solution from the drop-down list.	Text box, Alphanumeric (255)
Answer*	Specify solution details.	Text Area
Status	Specify the status of the solution.	Pick list
Description	Specify any other details about solution.	Text Area (32 KB)
Comments	Specify additional comments about the solution.	Text Area (32 KB)

To create Solutions

1. Click the **Solutions** tab.
2. In the *Solutions:* page, specify the solution details.
   Note: Solution Title, Question, and Answer are mandatory fields.
3. Click **Save**.

To create solutions instantly

1. Click the **Solutions** tab.
2. In left hand-side under the **New Solution** section, specify the mandatory details, such as Solution Title, Question and Answer.
3. Click **Save**. Solution details are displayed in the *Solution: < Solution Name>* page where you can update the additional details or perform the additional operations.

To create duplicate solutions

1. Click the **Solutions** tab.
2. In the *Solution List* view page, select the Solution to be duplicated.
3. In the *Solution: < Solution Name>* page, click the **Clone** button.
4. In the *Edit: < Solution Name>* page, modify some of the Solution-related details.
5. Click **Save**. Solution details are displayed in the *Solution: <Solution Name>* page where you can perform the additional operations.

Importing Solutions

(Access Privilege: Data import permission)

Administrator can import the solutions from other Help Desk and Knowledge Base applications.

Tips

- Use the CSV/XLS file format.
- The import file should contain the header column to map the data with Zoho CRM.
- Disable the Sort filter in import file (In import file, disable the filter option by Data □ Filter □ AutoFilter).
- Before importing the solutions into Zoho CRM close the import file and the corresponding Spreadsheet program.
- Remove apostrophe if present anywhere in the import file.
- You can import a maximum of 1000 potentials in one import cycle.

To import solution from external sources

1. Click the **Solutions** tab.
2. In the *Solutions: Home* page under *Solution Tools* section, click the **Import My Solutions** button.
3. In the *Import My Solutions Wizard* page, browse the solutions-related data (CSV/XLS format and then click the **Next** button.
4. In the *Fields Mapping* page, map the CSV/XLS column header with solution fields in Zoho CRM.
5. Click the **Import** button. It will take a few seconds to complete the importation.
6. In the *Solutions: Home* page, imported solutions are displayed under the *Solutions List* section. You can continue the importation further or complete the operation.

Viewing Solutions

(Access Privilege: Read permission)

Before replying to the cases, you may refer to the existing solutions. If the required solution is already available, you can save a lot of time and enhance the productivity. If the solution is not available, you can add a new solution item so that all the customer support persons can use it in future while encountering a similar problem.

To view solutions

1. Click the **Solutions** tab.

2. In the *Solutions Home* page, under the *Solutions List* section list of Solutions select the required Solutions.
3. In the *Solutions: <Solutions>* page the answer for the question is displayed.

Attaching Documents to the Solution

(Access Privilege: Read/Write/Delete permission)

You can attach additional documents to the solution.

To attach documents with solution

1. Click the **Solutions** tab.
2. In the *Solutions Home* page, under the *Solution List* section, select the required Solution.
3. In the *Solution: <Solution Name>* page, attach the documents.
4. Close the Solution page once all the required information is updated.

Exporting Solutions

(Access Privilege: Export permission)

Occasionally it is very useful to export the solutions from Zoho CRM to Spreadsheet programs, such as Microsoft Excel, OpenOffice, and others for further data analysis.

To export solutions to spreadsheets

1. Click the **Solutions** tab.
2. In the *Solutions: Home* page under the *Solution Tools* section, click the **Export All Solutions** button.
3. In the *File Download* pop-up dialog, Click **Save** to save the solutions details in *.CSV file format.

Changing Solution Owner

(Access Privilege: Read/Write permission)

It may be very useful to change the owner of some of the solutions when there are changes in support organization. You can change the owner of a single solution or multiple solutions.

To change owner of solutions individually

1. Click the **Solutions** tab.
2. In the *Solutions: Home* page, select the solution.
3. In the *Solution: <solution Name>* page, click the **Edit** button.
4. In the *solution: <solution Name>* page, change the solution owner from the **Solution Owner** lookup field.
5. Click **Save** to update the solution owner.

To change owner of solutions in bulk

1. Click the **solutions** tab.
2. In the *Solutions: Home* page, go to the **Solution List** section and select the check boxes corresponding to the solutions. You can also select all the solutions.
3. Click the **Change Owner** button.
4. In the *solutions: Change Owner* page, select the user from the **Select New Owner** pick list and click the **Update Owner** button to change the owner of the solutions permanently.

> ⚠️**Warning:** Solutions ownership will be changed to another user, irrespective of its existing owner. Use this operation carefully, otherwise solutions belonging to different users will be changed to new user. To overcome this problem, first you may search the solutions with a required owner name then change the owner in bulk.

Printing Solution Details

(Access Privilege: Read permission)

You can view a printable form and print the Solution details using Web browser's Print function.

To print solution details

1. Click the **Solutions** tab.
2. In the *Solutions: Home* page, under the **Solution List** section, select the required Solution.
3. In the *Solution: <Name>* page, click the **Printable View** link.
4. In the *Solution: <Solution Name>* page, click the **Print Page** button to print the document.

Deleting Solutions

(Access Privilege: Read/Write/Delete permission)

Occasionally you may need to remove some of the unnecessary solutions from the Zoho CRM system for a better user experience. You may consider removing solutions that are not useful for future reference.

Note: The deleted solutions are temporarily stored in Recycle Bin. If required you can restore the deleted again. However, if you delete solutions from Recycle Bin, you cannot restore again.

To delete solutions individually

1. Click the **Solutions** tab.
2. In the *Solutions: Home* page, select the Solution.
3. In the *Solution: <Solution Name>* page, click the **Delete** button.
4. In the *Confirmation* dialog, click **OK** to remove the Solution permanently.

To delete solutions in bulk

1. Click the **Solutions** tab.
2. In the *Solutions: Home* page, go to the *Solution List* section and select the check boxes corresponding to the solutions to be removed.
3. Click the **Delete** button.
4. In the *Confirmation* dialog, click **OK** to remove the selected solutions permanently.

Customizing Solutions

(Access Privilege: Customize ZohoCRM.com permission)

Customization of the solutions module includes, renaming the tab name, modifying the pick list values in standard fields, adding new custom fields, modifying solutions page layout, and show/hide the related list views according to your [Customer Support](#) management process requirements.

Working with Products

Products can be either goods or services, which are sold or procured by your organization. In Zoho CRM, you can manage your company- wide products that are sold to the customers as well as procured from the vendors. Hence, both sales and purchasing departments can use the Products module effectively according to their department process. In case your organization procures products from vendors and sell to customers with a markup, both sales and purchase departments can coordinate in a better way.

Sales department can use the products module along with other modules, such as leads, accounts, potentials, quotes, Sales Orders, and Invoices where as purchasing department can use along with Vendors and Purchase Orders. In general, Product details page contains the product name, manufacturer/reseller name, part numbers, sales start/end dates, support start/end dates, price, stock position and others.

The Products home page contains,

- Products List
- Product Reports
- Tools such as Import, Export, change owner, and delete
- Quick Create pane
- Search
- Alphabetical Search
- Custom Views
- Page Navigation

You can perform the following operations in *Products* module:

- Navigate products
- Search products (Alphabetical or advanced search options)
- Create List views
- Create new products (Form filling, quick create, or duplicate options)
- Associate products with other records
- Changing Product Owner (individually or in bulk)
- Export Products
- Print products details
- View Reports
- Delete products (individually or in bulk)
- Customize products

Navigating Products

(Access Privilege: Read permission)

You can navigate products available in the Products List.

To navigate products

1. Click the **Products** tab.
2. In the *Products Home* page, under the **Products List** section, click the Start, Previous, Next, or End link to access the list of products.

Searching Products

(Access Privilege: Read permission)

You can search the sales orders alphabetically or filling the required information in Search box.

To search products

1. Click the **Products** tab.
2. In the *Products Search* section, do one of the following:
    3.
    - o Specify the search criteria in Search box and click the **Go** button. Or
    - o Select one of the alphabetical search links.

3. In the *Products List* page, list of products are displayed as per search criteria.

Creating List Views

(Access Privilege: Read/Write permission)

In the *Product List* you can create/modify/delete the custom views, sort columns in the list view (ascending/descending order), search the records available in the current list view. In addition, you can modify some of the columns in standard list views. By default, the following standard list views are available in the Products module:

- All Products
- My Products
- Active Products

> **Note:** User created list views are displayed under **User Created Views** category in **View**
> drop-down list.

To create custom views

1. Click the **Products** tab.
2. In the *Products Home* page, under *Product List* section, click the Create View link.

   > **Note:** Under the Product List section, some of the standard list views are
   > displayed. You can only rearrange the order of columns and more columns.

3. In the *Create New View* page, do the following:
   o In the *View Information* section, specify name of the custom view in the **View
      Name** (mandatory) field. The custom view name appears in the View drop-down
      list. You can also set the custom view as a default list view by selecting the **Set as
      Default View** check box.
   o In the *Specify Criteria* section, specify the filter criteria. For more details, refer to
      the Specifying List View Criteria section.
   o In the *Choose Columns* section, select the columns to be displayed in the List
      View. For more details, refer to the Selecting List View Columns section.
   o In the *Accessibility Details* section, select the users to whom custom list view has
      to be enabled. For more details, refer to the Enabling View Access section.
4. Click **Save**. The custom list view is displayed in the View drop-down list.

Creating Products

(Access Privilege: Read/Write permission)

In Zoho CRM, you can store product details by entering data in product detail form.

> **Note:** Some of the standard fields listed below may not be visible/editable depending on
> your organization business process and field-level security settings. In case your organization
> added/modified fields, please contact your System Administrator for more details about usage of
> the other fields.

In the *Product: Edit* form, you need to specify the product-related information. The following
table provides descriptions of the various fields in the form.

List of Standard Product-related Fields

Field Name	Description	Data Type
Product Name*	Specify the name of the product. This field is mandatory.	Text box, alphanumeric (50)
Product Code	Specify the product identification.	Text box, alphanumeric (40)
Product Active	Specify the status of the product.	Check box
Commission Rate	Specify the commission rate for selling the product.	Text box, decimal ()
Qty/Unit	Specify the quantity rate for selling the product.	Decimal
Unit Price	Specify the unit price of the product.	Decimal
Manufacturer	Select the name of the product manufacturer.	Pick list
Product Category	Select the category of the product.	Pick list
Purchase Date	Select the date of purchase from the calendar.	Date
Support Start Date	Select the date on which the product support starts.	Date
Support Expiry Date	Select the date on which the product support ends.	Date
Description	Specify any other details about product.	Text area (long text)

To create products individually

1. Click the New Product link.
2. In the *Product:* page, specify the product details.

    Note: Product Name is a mandatory field. Refer to the List of Standard Product-related Fields section for more details.

3. Click **Save**.

Importing Products

(Access Privilege: Data Import permission)

Importing product details from external source to the CRM system is one of the most important activities while migrating data from legacy systems to Zoho CRM.

You can import products, if you are authorized to perform this operation. Otherwise, **Import Products** button in *Products Home* page will be hidden in your user interface. By default, product ownership is held up with the users, who import the products. You can change the product ownership while importing by adding a **product owner** column in import (CSV/XLS) file and map to the **Assigned To** field. This will automatically assign products to particular users. Use the exact Zoho CRM users' names while creating the product import file, otherwise product details are not created in Zoho CRM.

Tips:

- Before importing products into Zoho CRM, you must have the products details in a CSV/XLS file.
- You must have privilege to import the products in Zoho CRM.
- Before importing the products into Zoho CRM close the CSV/XLS file and the Spreadsheet program.
- Remove apostrophe any place in the CSV file (For example, ABC's).
- You can import a maximum of 1000 products in one import cycle.

To import product details from external sources

1. Click the **Products** tab.
2. In the *Products: Home* page under *Product Tools* section, click the **Import Products** button.
3. In the *Import Products* page, browse the Products-related data in CSV/XLS format and then click the **Submit** button.
4. In the *Fields Mapping* page, map the CSV/XLS column header with product related fields in Zoho CRM.
5. Click the **Import** button. It will take a few seconds to complete the importation.
6. In the *Products: Home* page, imported products are displayed under the *Products List* section. You can continue the importation further or complete the operation.

Associating Products with Other Records

(Access Privilege: Read permission)

You can create a 360-degrees view of the product to display all the associated details, such as products, trouble tickets, open activities, history of the completed activities, attachments, and notes:

- **Price Books:** To add different list prices to the product.
- **Open Activities:** To add tasks and events to product.
- **Closed Activities:** To display the closed tasks and events to product.
- **Cases:** To add cases to the product.
- **Solutions:** To add solutions to the product.
- **Attachments:** To attach documents to the product.
- **Notes:** To add notes to the product.

To associate Products with other Records

1. Click the **Products** tab.
2. In the *Products Home* page, under the *Product List* section, select the required product.
3. In the *Product: <Product Name>* page, do the following:
    - Edit the Product details.
    - Create activities, such as tasks and events.
    - Attach documents and notes.

4. You can close the Product page once all the required information is updated for the product.

Changing Product Owner

(Access Privilege: Read/Write permissions)

It may be very useful to change the owner of some of the products when there are changes in your organization structure. You can change the owner of a single product or multiple products.

To change owner of products individually

1. Click the **Products** tab.
2. In the *Products: Home* page, select the product.
3. In the *Product: <Product Name>* page, click the **Edit** button.
4. In the *Product: <Product Name>* page, change the product owner from the **Product Owner** lookup field.
5. Click **Save** to update the product owner.

To change owner of products in bulk

1. Click the **Products** tab.
2. In the *Products: Home* page, go to the **Product List** section and select the check boxes corresponding to the products. You can also select all the products.
3. Click the **Change Owner** button.
4. In the *Products: Change Owner* page, select the user from the **Select New Owner** pick list and click the **Update Owner** button to change the owner of the products permanently.

> **Note:** Products ownership will be changed to another user, irrespective of its existing owner. Use this operation carefully, otherwise products belonging to different users will be changed to new user. To overcome this problem, first you may search the products with a required owner name then change the owner in bulk.

Exporting Products

(Access Privilege: Data Export permissions)

Occasionally, it is very useful to export the products from Zoho CRM to a spreadsheet programs for further data analysis.

To export products to external sources

1. Click the **Products** tab.
2. In the *Products: Home* page under the *Product Tools* section, click the **Export All Products** button.
3. In the *File Download* pop-up dialog, click **Save** to save the Products files in *.CSV file format

Printing Product Details

(Access Privilege: Read permission)

You can view a printable form and print the product details using browser's Print function.

To print product details

1. Click the **Products** tab.
2. In the *Products: Home* page, go to the **Products List** section and select the required product.
3. In the *Product: < Product Name>* page click the **Printable View** link.

4. In the *Product: < Product Name>* page, click the **Print Page** button to print the document.

Viewing Reports

(Access Privilege: Read permission)

You can directly access some of the standard reports pertaining to products from the *Products Reports* section. By default, the following reports are displayed under Products module:

- Products by Category
- Products by Support Termination date
- Products by Cases

To view products report

1. Click the **Products** tab.
2. In the *Products: Home* page, go to the **Products Reports** section.
3. Click the required report link. The report is displayed in *Reports* page, which can be further customized as per your requirements.

For more details about reports customization, refer to *Chapter 19: [Working with Reports](#)*.

Deleting Products

(Access Privilege: Read/Write/Delete permission)

Rarely, you may need to remove the unnecessary products, which are not tracked further. This will help you manage your products in a better way. You can delete products either individually or in bulk.

⚠️**Warning:** The deleted potentials are temporarily stored in Recycle Bin. If required you can restore the deleted potentials again. However, if you delete potentials from Recycle Bin, you cannot restore again.

To delete products individually

1. Click the **Products** tab.
2. In the *Products: Home* page, select the product to be deleted.

3. In the *Product: <Product Name>* page, click **Delete**.
4. In the *Confirmation* dialog, click **OK** to delete the product permanently.

To delete products in bulk

1. Click the **Products** tab.
2. In the *Products: Home* page under the *Products List* section, select the products to be deleted using the **Select** check box.
3. Click the **Delete** button.
4. In the *Confirmation* dialog, click **OK** to delete the selected products permanently.

Customizing Products

(Access Privilege: Customize ZohoCRM.com permission)

Customization of the Products module includes, renaming the tab name, modifying the pick list values in standard fields, adding new custom fields, modifying Product page layout, and show/hide the related list views according to your Product catalog management process requirements.

Working with Price Books

Price Books are used for selling products at different prices, based on the agreement terms with a particular type of customer. For each customer you can sell the same product at different prices.

There are two key prices in Price Book one is **Unit Price** and other **List Price**. Unit Price is a fixed price of the product decided by manufacturer, which cannot be changed. List Price is the sellers' price. The manufacturer/resellers may sell the product with different prices to their resellers/customers. These variable prices for the same product are called as List Prices. The List Prices may vary according to the manufacturer's understanding with the reseller/customer.

The Price Book home page contains,

- Price Book List
- Tools, such as Import, Export, mass transfer, and delete vendors
- Quick Create pane
- Search
- Alphabetical Search
- Custom Views
- Change Owner
- Delete
- Page Navigation

Note: While creating a potential you can select products only from a single Price Book.

You can perform the following operations in *Price Books* module:

- Navigate Price Books
- Search Price Books (Basic and alphabetical)
- Create new Price Books (Form filling, duplicate, or import options)
- Associate products with Price Books
- Print Price Books
- Delete Price Books (individually or in bulk)
- Customize Price Books

Navigating Price Books

You can navigate Price Books available in the Price books list view.

To navigate Price Books

1. Click the **Price Books** tab.
2. In the *Price books Home* page under the **Price Books List** section, click the <u>Start</u>, <u>Previous</u>, <u>Next</u>, or <u>End</u> link to access the list of Price Books.

Searching Price Books

You can search the Price Books with basic details or alphabetically.

To search Price Books

1. Click the **Price Books** tab.
2. In the *Price books Home* page, under *Search* (Top LHS corner) section, do one of the following:
    o Enter the search criteria click the **Go** button. Or
    o Select one of the alphabetical search links.
3. In the *Price books, List* page, list of Price Books are displayed as per search criteria.

Creating Price Books

In Zoho CRM, you can store Price Book details by entering data in Price Book form or importing the data from external source.

Note: Some of the standard fields listed below may not be visible/editable depending on your organization business process and field-level security settings. In case your organization added/modified fields, please contact your System Administrator for more details about usage of the other fields.

In the *Price book: Edit* form, you need to specify the Price Book-related information. The following table provides descriptions of the various fields in the form.

List of Standard Price Book-related Fields

Field Name	Description	Data Type
Price book Owner	Select the Price Book owner from the available users list	Lookup
Price book Name*	Specify the name of the Price Book. This field is mandatory.	Text box, alphanumeric (50)

Field Name	Description	Data Type
Price book Owner	Select the Price Book owner from the available users list	Lookup
Active	Select the Active check box to set the status of the Price Book as active.	Check box
Description	Specify any other details about Price Book.	Text area (long text)

To create Price Books

1. Click the New Price Book link.
2. In the *Price book: < >* page, enter the Price Book details.
   Note: Price book Name is a mandatory field. Refer to the <u>List of Standard Price book-related Fields</u> section for more details.
3. Click **Save** to save the Price Book details.

To import Price Book data

1. Click the **Price Books** tab.
2. In the *Price books Home* page, under *Price book Tools* section, click the <u>Import My Price Books</u> or Import <u>My Organization Price Books</u> link according to your privilege.
3. In the *Specify Import File* section, browse the Price Book file (XLS or CSV format) and click the **Next**.
4. In the *Map Fields* section, map the XLS/CSV file headers with the Price Book related fields.
5. In the *Confirm Mapping* section, check the mapped fields. If you are OK with the mapping, click the **Import** button.
6. In the *Import Summary* page, click the **Go to Price book list** button. The imported data is displayed in the Price Books Home page.

Associating Products with Price Books

You can associate products with Price Books to create different list prices for the same product.

To associate Product with Price Book

1. Click the **Price Books** sub-tab.
2. In the *Price books Home* page, under the *Price book List* section, select the required Price Book.
3. In the *Price book: <Price book Name>* page, do the following:
   o In *Product List* section, click the **Add Product** button.

- o In *Add Products to Price Book* page, specify the List Price and select the products to be added to the Price Book.
- o Click the **Add to Price Book** button to add the products to the Price Book.

Changing Price Books Owner

You can transfer the Price Books record in between users whenever there are some organization changes.

To transfer Price Books individually

1. Click the **Price Books** tab.
2. In the *Price books: Home* page, select the Price Book to be transferred.
3. In the *Price book: <Price book Name>* page, click **Change Owner**.
4. In the *Confirmation* dialog, click **OK** to change the owner of the Price Book.

To transfer Price Books in bulk

1. Click the **Price Books** tab.
2. In the *Price books: Home* page, go to the *Price books List* section and select the Price Books to be transferred using the **Select** check box.
3. Click the **Change Owner** button.
4. In the *Confirmation* dialog, click **OK** to change the owner of the selected Price Books.

Printing Price Book Details

You can view a printable form and print the Price Book details using browser's Print function.

To print Price Book details

1. Click the **Price Books** tab.
2. In the *Price books: Home* page, go to the **Price books List** section and select the required Price Book.
3. In the *Price book: < Price book Name>* page click the Printable View link.
4. In the *Price book: < Price book Name>* page, click the **Print Page** button to print the document.

Deleting Price Books

Rarely, you may need to remove the unnecessary Price Books, which are not tracked further. This will help you manage your Price Books in a better way. You can delete Price Books either individually or in bulk.

⚠️**Warning:** The deleted Price Books are temporarily stored in Recycle Bin. If required you can restore the deleted Price Books again. However, if you delete Price Books from Recycle Bin, you cannot restore again.

To delete Price Books individually

1. Click the **Price Books** tab.
2. In the *Price books: Home* page, select the Price Book to be deleted.
3. In the *Price book: <Price book Name>* page, click **Delete**.
4. In the *Confirmation* dialog, click **OK** to delete the Price Book.

To delete Price Books in bulk

1. Click the **Price Books** tab.
2. In the *Price books: Home* page under the *Price books List* section, select the Price Books to be deleted using the **Select** check box.
3. Click the **Delete** button.
4. In the *Confirmation* dialog, click **OK** to delete the selected Price Books.

Customizing Price Books

(Access Privilege: Customize ZohoCRM.com permission)

Customization of the Price Books module includes, renaming the tab name, modifying the pick list values in standard fields, adding new custom fields, modifying Price Book page layout, and show/hide the related list views according to your Sales management requirements.

Working with Quotes

Sales Quotes are legally binding agreement between customer and vendor to deliver customer requested products in a specified timeframe at a predefined price. Your customers can place orders within the stipulated period (validity date) that has been specified in the quote otherwise you may cancel the quote or send a new quote extending the timeframe. In general Sales Quote contains the Quote number, date, line items (products) including the quantities and prices based on your Price Books, Terms & Conditions and others. In Zoho CRM, you can create a quote directly from the potential or from the account page.

The Quotes home page contains,

- Quotes List
- Quote Reports
- Quick Create pane
- Search
- Alphabetical Search
- Custom Views
- Page Navigation

You can perform the following operations in *Quotes* module:

- Navigate quotes
- Search quotes (Basic or alphabetical options)
- Create List views
- Create new quotes (Form filling or duplicate options)
- Associate quotes with other records
- Print quotes details
- View reports
- Delete quotes (individually or in bulk)
- Customize Quotes

Navigating Quotes

You can navigate quotes available in the Quotes List.

To navigate quotes

1. Click the **Quotes** tab.

2. In the *Quotes Home* page, under the **Quotes List** section, click the <u>Start</u>, <u>Previous</u>, <u>Next</u>, or <u>End</u> link to access the list of quotes.

Searching Quotes

You can search the quotes with basic details, such as Subject, Quote Name, Account Name, and Quote Stage. You can also search quotes alphabetically.

To search quotes

1. Click the **Quotes** tab.
2. In the *Quotes Home* page, under the *Quote Search* section, do one of the following:
    o Enter the search criteria in Quote Name, Quote Code, and Qty/Unit and Unit Price and click the **Search** button. Or
    o Select one of the alphabetical search links.
3. In the *Quotes List* page, list of quotes are displayed as per search criteria.

Creating List Views

(Access Privilege: Read/Write permission)

In the *Quote List* you can create/modify/delete the custom views, sort columns in the list view (ascending/descending order), search the records available in the current list view. In addition, you can modify some of the columns in standard list views. By default, the following standard list views are available in the Quotes module:

- All Quotes
- My Quotes

Note: User created list views are displayed under **User Created Views** category in **View** drop-down list.

To create custom views

1. Click the **Quotes** tab.
2. In the *Quotes Home* page, under *Quote List* section, click the <u>Create View</u> link.

> **Note:** Under the Quote List section, some of the standard list views are displayed. You can only rearrange the order of columns

and more columns.

3. In the *Create New View* page, do the following:
    o   In the *View Information* section, specify name of the custom view in the **View Name** (mandatory) field. The custom view name appears in the View drop-down list. You can also set the custom view as a default list view by selecting the **Set as Default View** check box.
    o   In the *Specify Criteria* section, specify the filter criteria. For more details, refer to the Specifying List View Criteria section.
    o   In the *Choose Columns* section, select the columns to be displayed in the List View. For more details, refer to the Selecting List View Columns section.
    o   In the *Accessibility Details* section, select the users to whom custom list view has to be enabled. For more details, refer to the Enabling View Access section.
4. Click **Save**. The custom list view is displayed in the View drop-down list.

Creating Quotes

In Zoho CRM, you can store quote details by entering data in quote detail form.

Note: Some of the standard fields listed below may not be visible/editable depending on your organization business process and field-level security settings. In case your organization added/modified fields, please contact your System Administrator for more details about usage of the other fields.

In the *Quote: Edit* form, you need to specify the quote-related information. The following table provides descriptions of the various fields in the form.

List of Standard Quote-related Fields

Field Name	Description	Data Type
Quote Owner	Select the name of the user to whom the quote is assigned.	Lookup
Subject*	Specify the name of the quote. This field is mandatory.	Text box, alphanumeric (50)
Quote Name	Specify the quote name for which the quote has to be created.	Text box, alphanumeric (40)
Quote Stage	Specify the status of the quote.	Check box
Valid Till	Specify the date until the quote is valid after sending to the prospective customer.	Date

Field Name	Description	Data Type
Quote Owner	Select the name of the user to whom the quote is assigned.	Lookup
Team	Specify the quantity rate for selling the quote.	Text box, alphanumeric (50)
Contact Name	Specify the contact to which the quote has to be created.	Lookup
Carrier	Select the name of the carrier manufacturer.	Pick list
Shipping	Select the category of the quote.	Text box, alphanumeric (50)
Inventory Manager	Specify the person responsible for shipping the shipment to the account or contact.	Text box, alphanumeric (50)
Account Name*	Specify the account name to which the quote has to be created.	Lookup
Billing Address*	Specify the billing address of the account or contact to which the quote has to be sent. If you have selected the account or contact, the corresponding billing address is automatically filled up.	Text box, alphanumeric (256)
Shipping Address*	Specify the shipping address of the account or contact to which the shipment has to be sent. If you have already selected the account or contact, the corresponding shipping address is automatically filled up.	Text box, alphanumeric (256)
Product Details	Specify the line items of the quote.	
Product	Select the product name.	Lookup
Quantity	Specify the number of units.	Numeric (Integer)
Unit Price	Displays the unit price of the product.	Alphanumeric
List Price	Select the product list price from Price Book or specify the product price.	Numeric
Total	Displays the amount of the selected products.	Alphanumeric
Terms & Conditions	Specify the terms and conditions that are associated with quote.	Text area (32 KB)
Description	Specify any other details about quote.	Text area (32 KB)

To create quotes

1. Click the New Quote link.

2. In the *Quote:* page, specify the quote details.
   Note: Quote Name, Account Name, Billing Address, Shipping Address, and Product Details are mandatory field. Refer to the [List of Standard Quote-related Fields](#) section for more details.
3. Click **Save** to save the quote details.

Associating Quotes with Other Records

You can create a 360-degrees view of the quote to display all the associated details, such as sales orders, open activities, and history of the completed activities.

- **Sales Orders**: To display sales orders associated with quotes.
- **Open Activities**: To add tasks and events related to quotes.
- **Closed Activities**: To display the completed activities.

To associate quotes with other records

1. Click the **Quotes** tab.
2. In the *Quotes Home* page, under the *Quote List* section, select the required quote.
3. In the *Quote: <Quote Name>* page, do the following:
   - Edit the Quote details.
   - Display the sales orders associated with quote.
   - Create activities, such as tasks and events (See chapter <No>: Managing Activities section for more details)
   - Display the completed activities.
4. You can close the Quote page once all the required information is updated for the quote.

Printing Quote Details

You can view a printable form and print the quote details using browser's Print function.

To print quote details

1. Click the **Quotes** tab.
2. In the *Quotes: Home* page under the *Quotes List* section, select the required quote.
3. In the *Quote: < Quote Name>* page click the **Printable View** button.
4. In the printable document page, click the **Print Page** button to print the document.

Viewing Reports

(Access Privilege: Read permission)

You can directly access some of the standard reports pertaining to quotes from the *Quotes Reports* section. By default, the following reports are displayed under Quotes module:

- Quotes by Accounts
- Converted Quotes
- Lost Quotes
- Quotes by Stage
- Open Quotes

To view quotes report

1. Click the **Quotes** tab.
2. In the *Quotes: Home* page under the **Quotes Reports** section, click the required report link.
3. The report is displayed in *Reports* page, which can be further customized as per your requirements.

For more details about reports customization, refer to *Chapter <>: Working with Reports*.

Deleting Quotes

Rarely, you may need to remove the unnecessary quotes, which are not tracked further. This will help you manage your quotes in a better way. You can delete quotes either individually or in bulk.

⚠️**Warning:** The deleted quotes are temporarily stored in Recycle Bin. If required you can restore the deleted quotes again. However, if you delete quotes from Recycle Bin, you cannot restore again.

To delete quotes individually

1. Click the **Quotes** tab.
2. In the *Quotes: Home* page, select the quote to be deleted.
3. In the *Quote: <Quote Name>* page, click **Delete**.
4. In the *Confirmation* dialog, click **OK** to delete the quote permanently.

To delete quotes in bulk

1. Click the **Quotes** tab.
2. In the *Quotes: Home* page, go to the *Quotes List* section and select the quotes to be deleted using the **Select** check box.
3. Click the **Delete** button.
4. In the *Confirmation* dialog, click **OK** to delete the selected quotes permanently.

Customizing Quotes

(Access Privilege: Customize ZohoCRM.com permission)

Customization of the Quotes module includes, renaming the tab name, modifying the pick list values in standard fields, adding new custom fields, modifying Quotes page layout, and show/hide the related list views according to your Sales process requirements.

Working with Purchase Orders

Purchase Order is an order placed for procuring products or services from your short listed vendors. In general PO contains the PO number, date, line items (products) including the quantities and prices based on Sales Quote, Billing address, Shipping address, Terms & Conditions and others. You can use the PO for communicating your product and pricing requirements to vendors so that there will not be any obligations in future. In addition, you can use the PO to crosscheck the products shipped to your shipping address and invoices sent to your billing address. In addition, your vendor can use PO as legal document in the event of nonpayment in a court of law for claiming damages from your side. To summarize, PO is a legal binding document that protects interests of both vendor and buyers, which can be used as legal binding document for both parties.

In PO module, you can create PO for the products to be procured, associate POs to the vendors, track the status of the POs, create printer friendly format.

The Purchase Order home page contains,

- POs List
- PO Reports
- Quick Create pane
- Search
- Alphabetical Search
- Custom Views
- Page Navigation

You can perform the following operations in *Purchase Orders* module:

- Navigate purchase orders
- Search purchase orders (Alphabetical or advanced search options)
- Create new purchase orders (Form filling or duplicate options)
- Associate purchase orders with other records
- Print purchase orders details
- View reports
- Delete purchase orders (individually or in bulk)
- Customize Purchase Orders

Navigating Purchase Orders

(Access Privilege: Read permission)

You can navigate purchase orders available in the Purchase Orders List.

To navigate purchase orders

1. Click the **Purchase Orders** tab.
2. In the *Purchase Orders Home* page under the *Purchase Orders List* section, click the <u>Start</u>, <u>Previous</u>, <u>Next</u>, or <u>End</u> link to access the list of purchase orders.

Searching Purchase Orders

(Access Privilege: Read permission)

You can search the purchase orders alphabetically or filling the required information in Search box.

To search purchase orders

1. Click the **Purchase Orders** tab.
2. In the *Purchase Order Search* section, do one of the following:
   - Specify the search criteria in Search box and click the **Go** button. Or
   - Select one of the alphabetical search links.
3. In the *Purchase Orders List* page, list of purchase orders are displayed as per search criteria.

Creating Purchase Orders

(Access Privilege: Read/Write permission)

In Zoho CRM, you can store purchase order details by entering data into the purchase order form.

> **Note:** Some of the standard fields listed below may not be visible/editable depending on your organization business process and field-level security settings. In case your organization added/modified fields, please contact your System Administrator for more details about usage of the other fields.

In the *Purchase Order: Edit* form, you need to specify the purchase order-related information. The following table provides descriptions of the various fields in the form.

List of Standard Purchase Order-related Fields

Field Name	Description	Data Type
Subject*	Specify the name of the purchase order. This field is mandatory.	Text box, alphanumeric (50)
Sales Order	Select the reference Sales order.	Select option
Customer No	Specify the customer identification number (if any)	Text box, alphanumeric (50)
Purchase Order Date	Specify the date on which purchase order is created.	Date
Due Date	Select the due date.	Date
Sales Commission	Specify the commission to the sales person upon closing the deal.	Numeric (float)
Account Name *	Specify the account name to which the purchase order has to be created.	Select option
Status	Specify the status of the purchase order.	Check box
Account Name *	Specify the account name to which the purchase order has to be created.	Select option
Assigned To*	Select the Zoho CRM user name to whom the purchase order handling duty is assigned.	Select option
Billing Address *	Specify the billing address of the account or contact to which the purchase order has to be sent. If you have selected the account or contact the billing address is automatically filled up.	Text box, alphanumeric (256)
Shipping Address *	Specify the shipping address of the account or contact to which the shipment has to be sent. If you have already selected the account or contact, the shipping address is automatically filled up.	Text box, alphanumeric (256)
Product Details	Specify the line items of the purchase order.	
Product	Select the product name.	Select option
Quantity	Specify the number of units.	Numeric (Integer)
Unit Price	Displays the unit price of the product.	
List Price	Select the product list price from Price Book or specify the product price	Lookup and Numeric (Integer)
Total	Displays the amount of the selected products.	
Terms & Conditions	Specify the terms and conditions that are	Text area (long text)

Field Name	Description	Data Type
	associated with purchase order.	
Description	Specify any other details about purchase order.	Text area (long text)

To create purchase orders

1. Click the New Purchase Order link.
2. In the *Purchase Order:* page, specify the purchase order details.

    Note: Subject, Account Name, Billing Address, Shipping Address, and Product Details are mandatory field. Refer to the **List of Standard Purchase Order-related Fields** section for more details.

3. Click **Save**.

Associating Purchase Orders with Other Records

(Access Privilege: Read/Write permission)

You can associate the purchase order with other records such as, activities, attachments, and notes.

- **Activities**: To add tasks related to purchase orders.
- **Attachments**: To attach files to purchase orders.
- **Notes:** To add notes to purchase orders.

To associate Purchase Orders with other Records

1. Click the **Purchase Orders** tab.
2. In the *Purchase Orders Home* page, under the *Purchase Order List* section, select the required purchase order.
3. In the *Purchase Order: <Purchase Order Name>* page, do the following:
    o Edit the Purchase Order details.
    o Create tasks.
    o Add files and notes.
4. You can close the purchase order page once all the required information is updated for the purchase order.

Printing Purchase Order Details

(Access Privilege: Read permission)

You can view a printable form and print the purchase order details using browser's Print function.

To print purchase order details

1. Click the **Purchase Orders** tab.
2. In the *Purchase Orders: Home* page under the *Purchase Orders List* section, select the required purchase order.
3. In the *Purchase Order: <Purchase Order Name>* page click the **Printable View** button.
4. In the *Purchase Order: <Purchase Order Name>* page, click the **Print Page** button to print the document.

Viewing Reports

(Access Privilege: Read/Write permission)

You can directly access some of the standard reports pertaining to purchase orders from the *Purchase Orders Reports* section. By default, the following reports are displayed under Purchase Orders module:

- Vendors Vs Purchases
- Contacts Vs Purchases
- Purchase Orders by Status

To view purchase order report

1. Click the **Purchase Orders** tab.
2. In the *Purchase Orders: Home* page under the **Purchase Orders Reports** section, click the required report link.
3. The report is displayed in *Reports* page, which can be further customized as per your requirements.

For more details about reports customization, refer to *Chapter 19: Working with Reports*.

Deleting Purchase Orders

(Access Privilege: Read/Write/Delete permission)

Rarely, you may need to remove the unnecessary purchase orders, which are not tracked further. This will help you manage your purchase orders in a better way. You can delete purchase orders either individually or in bulk.

⚠️**Warning:** The deleted purchase orders are temporarily stored in Recycle Bin. If required you can restore the deleted purchase orders again. However, if you delete purchase orders from Recycle Bin, you cannot restore again.

To delete purchase orders individually

1. Click the **Purchase Orders** tab.
2. In the *Purchase Orders: Home* page, select the purchase order to be deleted.
3. In the *Purchase Order: <Purchase Order Name>* page, click **Delete**.
4. In the *Confirmation* dialog, click **OK** to delete the purchase order permanently.

To delete purchase orders in bulk

1. Click the **Purchase Orders** tab.
2. In the *Purchase Orders: Home* page under the *Purchase Orders List* section, select the purchase orders to be deleted using the **Select** check box.
3. Click the **Delete** button.
4. In the *Confirmation* dialog, click **OK** to delete the selected purchase orders permanently.

Customizing Purchase Orders

(Access Privilege: Customize ZohoCRM.com permission)

Customization of the Purchase Orders module includes, renaming the tab name, modifying the pick list values in standard fields, adding new custom fields, modifying PO page layout, and show/hide the related list views according to your Purchase management process requirements.

Working with Sales Orders

Sales Order (SO) can be created once the quote is accepted by your prospective customer (potential) and sends the Purchase Order (PO) for further processing. After receiving the PO, some of the customers may request SOs to know the exact date of delivery of the goods/services. In addition, the inventory/production department looks at the list of SOS to see what needs to be shipped out (and when). After the order is shipped and delivered to the customer an invoice is generated from the sales order for billing purposes. Precisely Sales Order is a confirmation document sent to the customers before delivering the goods/services. In general SO contains the SO number, date, line items (products) including the quantities and prices based on PO, Billing address, Shipping address, Terms & Conditions and others.

The *Sales Order* home page contains,

- SOS List
- SO Reports
- Tools, such as mass transfer and delete vendors
- Quick Create pane
- Search
- Alphabetical Search
- Custom Views
- Page Navigation

You can perform the following operations in *Sales Orders* module:

- [Navigate Sales Orders](#)
- [Search Sales Orders](#) (Alphabetical or advanced search options)
- [Create new Sales Orders](#) (Form filling or duplicate options)
- [Associate Sales Orders with other records](#)
- [Print Sales Orders details](#)
- [View reports](#)
- [Delete Sales Orders](#) (individually or in bulk)
- [Customize Sales Orders](#)

Navigating Sales Orders

(Access Privilege: Read/Write permission)

You can navigate sales orders available in the Sales Orders List.

To navigate sales orders

1. Click the **Sales Orders** tab.
2. In the *Sales Orders Home* page under the *Sales Orders List* section, click the <u>Start</u>, <u>Previous</u>, <u>Next</u>, or <u>End</u> link to access the list of sales orders.

Searching Sales Orders

(Access Privilege: Read permission)

You can search the sales orders alphabetically or filling the required information in Search box.

To search sales orders

1. Click the **Sales Orders** tab.
2. In the *Sales Order Search* section, do one of the following:
   o Specify the search criteria in Search box and click the **Go** button. Or
   o Select one of the alphabetical search links.
3. In the *Sales Orders List* page, list of sales orders are displayed as per search criteria.

Creating Sales Orders

(Access Privilege: Read/Write permission)

In Zoho CRM, you can store sales order details by entering data in sales order detail form.

Note: Some of the standard fields listed below may not be visible/editable depending on your organization business process and field-level security settings. In case your organization added/modified fields, please contact your System Administrator for more details about usage of the other fields.

In the *Sales Order: Edit* form, you need to specify the sales order-related information. The following table provides description of the various fields in the form.

List of Standard Sales Order-related Fields

Field Name	Description	Data Type
Subject*	Specify the name of the sales order. This field is mandatory.	Text box, alphanumeric (50)

Field Name	Description	Data Type
Potential Name	Select the potential for which the sales order has to be generated.	Select option
Customer No	Specify the customer identification number (if any)	Text box, alphanumeric (50)
Purchase Order	Select the reference purchase order.	Select option
Quote Name	Select the reference quote.	Select option
Contact Name	Select the contact for which the sales order has to be generated.	Select option
Due Date	Select the date	Date
Carrier	Select the carrier's name that ships the products from your warehouse to customer site.	Pick list
Pending		Text box, alphanumeric (50)
Status	Specify the status of the sales order.	Check box
Sales Commission	Specify the commission to the sales person upon closing the deal.	Numeric (float)
Excise Duty	Specify the excise duty for the shipment	Text box, numeric
Account Name*	Specify the account name to which the sales order has to be created.	Select option
Assigned To	Select the Zoho CRM user name to whom the sales order handling duty is assigned.	Select option
Billing Address *	Specify the billing address of the account or contact to which the sales order has to be sent. If you have selected the account or contact the billing address is automatically filled up.	Text box, alphanumeric (256)
Shipping Address *	Specify the shipping address of the account or contact to which the shipment has to be sent. If you have already selected the account or contact, the shipping address is automatically filled up.	Text box, alphanumeric (256)
Product Details	Specify the line items of the sales order.	
Product *	Select the product name.	Select option
Quantity in Stock	Displays the stock quantity..	Numeric (Integer)
Quantity*	Specify the quantity for which the sales order has to be generated	Numeric (Integer)
Unit Price	Displays the unit price of the product.	Currency

Field Name	Description	Data Type
List Price*	Select the product list price from Price Book or specify the product price.	Lookup and Numeric (Integer)
Tax	Specify the tax component of the products	Currency
Adjustments	Specify if there are any adjustments, such as discounts, or extra charges etc.	Currency
Total	Displays the amount of the selected line item.	Currency
Terms & Conditions	Specify the terms and conditions that are associated with sales order.	Text area (long text)
Description	Specify any other details about sales order.	Text area (long text)

To create sales orders

1. Click the <u>New Sales Order</u> link.
2. In the *Sales Order:* page, specify the sales order details.

   Note: Subject, Account Name, Billing Address, Shipping Address, and Product Details are mandatory fields. Refer to the List of Standard Sales Order-related Fields section for more details.

3. Click **Save**.

Associating Sales Orders with Other Records

(Access Privilege: Read/Write permission)

You can associate the sales order with other records such as, activities, attachments and notes.

- **Invoices:** To create invoices from the sales order.
- **Open Activities:** To add tasks related to sales order.
- **Closed Activities:** To display the closed activities.
- **Attachments:** To add files and notes to sales order.

To associate Sales Orders with other Records

1. Click the **Sales Orders** tab.
2. In the *Sales Orders Home* page, under the *Sales Order List* section, select the required sales order.

3. In the *Sales Order: <Sales Order Name>* page, do the following:
    o Edit the Sales Order details.
    o Create invoices.
    o Create tasks.
    o Attach files.
4. You can close the sales order page once all the required information is updated for the sales order.

Printing Sales Order Details

(Access Privilege: Read permission)

You can view a printable form and print the sales order details using browser's Print function.

To print sales order details

1. Click the **Sales Orders** tab.
2. In the *Sales Orders: Home* page under the *Sales Orders List* section, select the required sales order.
3. In the *Sales Order: < Sales Order Name>* page click the **Printable View** button.
4. In the *Sales Order: < Sales Order Name>* page, click the **Print Page** button to print the document.

Viewing Reports

(Access Privilege: Read/Write permission)

You can directly access some of the standard reports pertaining to sales orders from the *Sales Orders Reports* section. By default, the following reports are displayed under Sales Orders module:

- Sales Orders by Accounts
- Sales Orders by Status

To view sales order report

1. Click the **Sales Orders** tab.
2. In the *Sales Orders: Home* page under the **Sales Orders Reports** section, click the required report link.

3. The report is displayed in *Reports* page, which can be further customized as per your requirements.

For more details about reports customization refer to *Chapter 19: Working with Reports*.

Deleting Sales Orders

(Access Privilege: Read/Write/Delete permission)

Rarely, you may need to remove the unnecessary sales orders, which are not tracked further. This will help you manage your sales orders in a better way. You can delete sales orders either individually or in bulk.

> ⚠️**Warning:** The deleted sales orders are temporarily stored in Recycle Bin. If required you can restore the deleted sales orders again. However, if you delete sales orders from Recycle Bin, you cannot restore again.

To delete sales orders individually

1. Click the **Sales Orders** tab.
2. In the *Sales Orders: Home* page, select the sales order to be deleted.
3. In the *Sales Order: <Sales Order Name>* page, click **Delete**.
4. In the *Confirmation* dialog, click **OK** to delete the sales order permanently.

To delete sales orders in bulk

1. Click the **Sales Orders** tab.
2. In the *Sales Orders: Home* page under the *Sales Orders List* section, select the sales orders to be deleted using the **Select** check box.
3. Click the **Delete** button.
4. In the *Confirmation* dialog, click **OK** to delete the selected sales orders permanently.

Customizing Sales Orders

(Access Privilege: Customize ZohoCRM.com permission)

Customization of the SO module includes, renaming the tab name, modifying the pick list values in standard fields, adding new custom fields, modifying SO page layout, and show/hide the related list views according to your Sales management process requirements.

Working with Invoices

Once the sales stage reaches to final stage, you may start working on payment procedure. In this regard, Invoice plays a vital role, which is very important for both Sales and Accounting

purposes. Invoice is a bill issued by the vendor to the customers along with the goods/services shipment. It usually contains reference number of Purchase Order, Date, Billing Address, Shipping Address, Terms of Payment, Line Items (products/services) with quantities and prices, and others. In a typical organization, invoicing completes the sales process and begins the accounting process where account receivable is managed by Accounts/Finance teams.

In Zoho CRM, you can create invoices directly from the Potentials, Accounts, Quotes, or Sales Orders.

Invoices module contains the following components:

- Invoices List View
- Page Navigation
- Quick Create Invoices
- Invoice Reports
- Alphabetical Search
- Custom Views

You can perform the following operations in Invoices module:

- Navigate invoices
- Search invoices (Alphabetical or Advanced search options)
- Create invoices (Form filling or duplicate options)
- Associate invoices with other records
- Print invoice details
- View reports
- Delete invoices (individually or in bulk)
- Customize invoices

Navigating Invoices

(Access Privilege: Read permission)

You can navigate invoices available in the Invoices List.

To navigate invoices

1. Click the **Invoices** tab.
2. In the *Invoices Home* page, under the **Invoices List** section, click the Start, Previous, Next, or End link to access the list of invoices.

Searching Invoices

(Access Privilege: Read permission)

You can search the Invoices alphabetically or filling the required information in Search box.

To search invoices

1. Click the **Invoices** tab.
2. In the *Invoices Home* page, under the *Invoice Search* section, do one of the following:
   o Specify the search criteria in Search box and click the **Go** button. Or
   o Select one of the alphabetical search links.
3. In the *Invoices List* page, list of invoices are displayed as per search criteria.

Creating Invoices

(Access Privilege: Read/Write permission)

In Zoho CRM, you can create invoices by entering data into invoice detail form.

Note: Some of the standard fields listed below may not be visible/editable depending on your organization business process and field-level security settings. In case your organization added/modified fields, please contact your System Administrator for more details about usage of the other fields.

In the *Invoice: Edit* form, you need to specify the invoice-related information. The following table provides descriptions of the various fields in the form.

List of Standard Invoice-related Fields

Field Name	Description	Data Type
Subject*	Specify the name of the invoice. This field is mandatory.	Text box, alphanumeric (50)
Sales Order	Select the reference Sales order (if any).	Lookup
Customer No	Specify the customer identification number (if any).	Text box, alphanumeric (50)
Invoice Date	Specify the date on which the invoice is created.	Date
Due Date	Specify the potential name for which the invoice	Text box, alphanumeric

Field Name	Description	Data Type
	has to be created.	(40)
Sales Commission	Specify the commission to the sales person upon closing the deal.	Numeric (float)
Account Name *	Specify the account name to which the invoice has to be created.	Lookup
Status	Specify the status of the invoice.	Check box
Account Name *	Specify the account name to which the invoice has to be created.	Lookup
Assigned To*	Select the Zoho CRM user name to whom the invoice handling duty is assigned.	Lookup
Billing Address *	Specify the billing address of the account or contact to which the invoice has to be sent. If you have selected the account or contact the billing address is automatically filled up.	Text box, alphanumeric (256)
Shipping Address *	Specify the shipping address of the account or contact to which the shipment has to be sent. If you have already selected the account or contact, the shipping address is automatically filled up.	Text box, alphanumeric (256)
Product Details	Specify the line items of the invoice.	
Product*	Select the product name.	Lookup
Quantity	Specify the number of units.	Numeric (Integer)
Unit Price	Displays the unit price of the product.	Currency
List Price*	Select the product list price from Price Book or specify the product price	Lookup and Numeric (Integer)
Total	Displays the amount of the selected products.	Currency
Terms & Conditions	Specify the terms and conditions that are associated with invoice.	Text area (32 KB)
Description	Specify any other details about invoice.	Text area (32 KB)

To create invoices

1. Click the <u>New Invoice</u> link. Note: The New Invoice link is present under
2. In the *Invoice:* page, specify the invoice details.

> **Note:** Subject, Account Name, Billing Address, Shipping Address, and Line
> Items are mandatory fields. Refer to the <u>List of Standard Invoice-related Fields</u>
> section for more details.

3. Click **Save**. An invoice will be created with a permanent Invoice ID, which can be used future reference.

Associating Invoices with Other Records

(Access Privilege: Read/Write permission)

You can associate invoice with the other records such as, activities, attachments and notes.

- **Activities**: To add tasks related to invoices.
- **Attachments & Notes**: To add the files and notes to invoices.

To associate Invoices with other Records

1. Click the **Invoices** tab.
2. In the *Invoices Home* page, under the *Invoice List* section, select the required invoice.
3. In the *Invoice: <Invoice Name>* page, do the following:
   - Edit the Invoice details.
   - Create tasks.
   - Add files and notes.
4. You can close the invoice page once all the required information is updated for the invoice.

Printing Invoice Details

(Access Privilege: Read permission)

You can view a printable form and print the invoice details using browser's Print function.

To print invoice details

1. Click the **Invoices** tab.
2. In the *Invoices: Home* page under the *Invoices List* section, select the required invoice.
3. In the *Invoice: <Invoice Name>* page click the **Print Preview** button.
4. In the *Invoice: <Invoice Name>* page, click the **Print Page** button. You can print the document using the Web browser print function.
5. Save the invoice file (PDF) locally and send to your customer separately.

Viewing Reports

(Access Privilege: Read/Write permission)

You can directly access some of the standard reports pertaining to Invoices from the *Invoice Reports* section. In addition to reports, you can access one of the dashboards in Invoices module.

By default, the following reports are displayed under Invoices module:

- Invoices by Accounts
- Invoices by Status

To view Invoice report

1. Click the **Invoices** tab.
2. In the *Invoices: Home* page under the *Invoices Reports* section, click the required Report link.
3. The Report is displayed in Reports page, which can be further customized as per your requirements.

For more details about reports customization, refer to *Chapter 19: Working with Reports*.

Deleting Invoices

(Access Privilege: Read/Write/Delete permission)

Rarely, you may need to remove the unnecessary invoices, which are not tracked further. This will help you manage your invoices in a better way. You can delete invoices either individually or in bulk.

> ⚠️**Warning:** The deleted invoices are temporarily stored in Recycle Bin. If required you can restore the deleted invoices again. However, if you delete invoices from Recycle Bin, you cannot restore again.

To delete invoices individually

1. Click the **Invoices** tab.
2. In the *Invoices: Home* page, select the invoice to be deleted.
3. In the *Invoice: <Invoice Name>* page, click **Delete**.
4. In the *Confirmation* dialog, click **OK** to delete the invoice permanently.

To delete invoices in bulk

1. Click the **Invoices** tab.
2. In the *Invoices: Home* page, go to the *Invoices List* section and select the invoices to be deleted using the **Select** check box.
3. Click the **Delete** button.
4. In the *Confirmation* dialog, click **OK** to delete the selected invoices permanently.

Customizing Invoices

(Access Privilege: Customize ZohoCRM.com permission)

Customization of the invoices module includes, renaming the tab name, modifying the pick list values in standard fields, adding new custom fields, modifying invoices page layout, and show/hide the related list views according to your Accounting management process requirements.

Working with Vendors

Vendors include companies, people, and contractors from which your company procures products and services. They can be either direct manufacturers or resellers. In Zoho CRM typical vendor selection process involves the following steps:

- Evaluate your business needs and create requirements document (RFI/RFP).
- Collect information about vendors from Trade Magazines, Yellow Pages, Advertisements, referrals, and other channels.
- Send RFI (request for information) to vendors and scrutinize the primary list of vendors based on their response to your RFI.
- Send RFP (request for proposals) to selected list of vendors.
- Evaluate vendors based on the response to your RFP and conduct vendor interviews and short-list the vendors.
- Gather required information, such as product details, communication channel, product delivery process and others from the short listed vendors.
- In Zoho CRM - Vendors module, create vendor information, such as business address of the vendor, contact information of the persons you are dealing with, products supplied /to be supplied, purchase orders for the shipments, activities related to vendors and others. In addition, you can also attach the important documents related to each vendor.
- Periodically update the vendors' details and products purchased so that you can have a better visibility on your vendors/suppliers for the future procurement.

The Vendor home page contains,

- Vendors List
- Vendor Reports
- Tools, such as Import, Export, mass transfer, and delete vendors
- Quick Create pane
- Search
- Alphabetical Search
- Custom Views
- Change Owner
- Delete
- Page Navigation

You can perform the following operations in the Vendors module:

- [Navigate vendors](#)
- [Search vendors](#) (Alphabetical search options)
- [Create List views](#)
- [Create vendors](#) (Form filling, quick create, or duplicate options)
- [Import vendors](#)
- [Associate vendors with other records](#)
- [Change vendor ownership](#) (individually or in bulk)
- [Export vendors](#)
- [View reports](#)
- [Print vendors details](#)

- [Delete vendors](#) (individually or in bulk)
- [Customize Vendors](#)

Navigating Vendors

(Access Privilege: Read permissions)

You can navigate vendors available in the Vendors List.

To navigate vendors

1. Click **Vendors** tab.
2. In the *Vendors Home* page, under the **Vendors List** section, click the Start, Previous, Next, or End link to access the list of vendors.

Searching Vendors

(Access Privilege: Read permissions)

You can search the vendors alphabetically or filling the required information in Search box.

To search vendors

1. Click the **Vendors** tab.
2. In the *Vendors Home* page, under the *Vendor Search* section, do one of the following:
   - Specify the search criteria in the **Search** field and click the **Go** button. Or
   - Select one of the alphabetical search links.
3. In the *Vendors List* page, list of vendors are displayed as per search criteria.

Creating List Views

(Access Privilege: Read/Write permission)

In the *Vendor List* you can create/modify/delete the custom views, sort columns in the list view (ascending/descending order), search the records available in the current list view. In addition, you can modify some of the columns in standard list views. By default, the following standard list views are available in the Vendors module:

- All Vendors
- My Vendors

> **Note:** User created list views are displayed under **User Created Views** category in **View** drop-down list.

To create custom views

1. Click the **Vendors** tab.
2. In the *Vendors Home* page, under *Vendor List* section, click the Create View link.

   > **Note:** Under the Vendor List section, some of the standard list views are displayed. You can only rearrange the order of columns and more columns.

   ---

3. In the *Create New View* page, do the following:
   - In the *View Information* section, specify name of the custom view in the **View Name** (mandatory) field. The custom view name appears in the View drop-down list. You can also set the custom view as a default list view by selecting the **Set as Default View** check box.
   - In the *Specify Criteria* section, specify the filter criteria. For more details, refer to the Specifying List View Criteria section.
   - In the *Choose Columns* section, select the columns to be displayed in the List View. For more details, refer to the Selecting List View Columns section.
   - In the *Accessibility Details* section, select the users to whom custom list view has to be enabled. For more details, refer to the Enabling View Access section.
4. Click **Save**. The custom list view is displayed in the View drop-down list.

Creating Vendors

(Access Privilege: Read/Write permissions)

In Zoho CRM, you can store vendor details by entering data in vendor detail form.

> **Note:** Some of the standard fields listed below may not be visible/editable depending on your organization business process and field-level security settings. In case your organization added/modified fields, please contact your System Administrator for more details about usage of the other fields.

In the *Vendor: Edit* form, you need to specify the vendor-related information. The following table provides descriptions of the various fields in the form.

List of Standard Vendor-related Fields

Field Name	Description	Data Type
Vendor Name*	Specify the name of the vendor. This field is mandatory	Text box, alphanumeric (50)
Phone	Specify the phone number of the vendor	Text box, alphanumeric (40)
E-mail	Specify the E-mail ID of the vendor	Check box
Website	Specify the Web site URL of the vendor	Text box, decimal ()
GL Account	Select the general ledger account	Pick List
Category	Specify the category of the vendor	Text box, alphanumeric (40)
Vendor Address • Street • City • State • Postal Code • Country	Specify the address of the vendor	
Description	Specify any other details about vendor	Text area (long text)

To create vendors

1. Click the New Vendor link.
2. In the *Vendor:* page, specify the vendor details.
   Note: Vendor Name is a mandatory field. Refer to the List of Standard Vendor-related Fields section for more details.
3. Click **Save** to save the vendor details.

To create vendors instantly

1. Click the **Vendors** tab.
2. In left hand-side under the **Quick Create** section, enter the mandatory details (Vendor Name).
3. Click **Save**. Vendor details are displayed in *Vendors Home* page, where you can update the additional details.

To create duplicate records of vendors

1. Click the **Vendors** tab.
2. In the *Vendor List* view page, select the vendor to be duplicated.
3. In the *Vendor: <Vendor Name>* page, click the **Clone** button.
4. In the *Edit: <Vendor Name>* page, modify some of the vendor details.
5. Click **Save**. Vendor details are displayed in the *Vendor: <Vendor Name>* page where you can perform the additional operations.

Importing Vendors

(Access Privilege: Data Import permissions)

You can import vendor information from other legacy applications, such as spreadsheets, documents, and others to the Zoho CRM system. You can import the vendor information if you are authorized to perform this operation. Otherwise, **Import Vendors** button in *Vendors Home* page will be hidden in your user interface. By default, vendor ownership is held up with the user, who imports the vendors. You can change the vendor ownership while importing by adding a **vendor owner** column in import (CSV/XLS) file and map to the **Assigned To** field. This will automatically assign vendors to selected users. Use the exact Zoho CRM users' names while creating the vendor import file, otherwise vendors are not created in Zoho CRM.

Tips:

- Before importing vendors into Zoho CRM, you must have the vendor's details in a CSV/XLS file.
- You must have privilege to import the vendors in Zoho CRM.
- Before importing, the vendors into Zoho CRM close the CSV/XLS file and the Spreadsheet program.
- Remove apostrophe any place in the CSV file (For example, ABC's).
- You can import a maximum of 1000 vendors in one import cycle.

To import vendors from external sources

1. Click the **Vendors** tab.
2. In the *Vendors: Home* page under *Vendor Tools* section, click the **Import My Vendors** button.
3. In the *Import My Vendors Wizard* page, browse the Vendors-related data (CSV/XLS format) and then click the **Next** button.
4. In the *Fields Mapping* page, map the CSV/XLS column header with vendor fields in Zoho CRM.

5. Click the **Import** button. It will take a few seconds to complete the importation.
6. In the *Vendors: Home* page, imported vendors are displayed under the *Vendors List* section. You can continue the importation further or complete the operation.

Associating Vendors with Other Records

(Access Privilege: Read/Write permissions)

You can create a 360-degrees view of the vendor to display all the associated details, such as products, activities, contacts, and purchase orders.

- **Products**: To add products that are purchased from vendor
- **Purchase Orders**: To create purchase orders for procuring products from the vendors
- **Open Activities**: To add new tasks and events.
- **Closed Activities**: To track closed tasks and events.
- **Attachments**: To add files to the vendor record.
- **Contacts**: To add contacts related to vendors.

To associate Vendors with other Records

1. Click the **Vendors** tab.
2. In the *Vendors Home* page, under the *Vendor List* section, select the required vendor.
3. In the *Vendor: <Vendor Name>* page, do the following:
   o Edit the Vendor details.
   o Create Products (See chapter <No>: Managing Activities section for more details)
   o Create Purchase Orders (See chapter <No>: Creating Emails and Creating Notes sections for more details)
   o Create Contacts: (See chapter <No>: Attaching Documents section for more details)
4. You can close the Vendor page once all the required information is updated for the vendor.

Changing Vendor Owner

You can change the owner of an individual vendor or a group of vendors.

To change owner of vendors individually

1. Click the **Vendors** tab.
2. In the *Vendors: Home* page, select the vendor.
3. In the *Vendor: <Vendor Name>* page, change the vendor owner from the **Vendor Owner** lookup field.
4. Click **Save** to update the vendor owner.

To change owner of vendors in bulk

1. Click the **Vendors** tab.
2. In the *Vendors: Home* page, go to the **Vendor List** section and select the check boxes corresponding to the vendors. You can also select all the vendors.
3. Click the **Change Owner** button.
4. In the *Vendors: Change Owner* page, select the user from the **Assigned To** pick list and click the **Save** button to change the owner of the vendors permanently.

   Note: Vendors ownership will be changed to another user, irrespective of its existing owner. Use this operation carefully, otherwise vendors belonging to different users will be changed to new user. To overcome this problem, first you may search the vendors with a required owner name then change the owner in bulk.

Exporting Vendors

Occasionally it is very useful to export the vendor details from Zoho CRM to Spreadsheet programs, such as Microsoft Excel, OpenOffice, and others for further data analysis.

To export vendors to external sources

1. Click the **Vendors** tab.
2. In the *Vendors: Home* page under the *Vendor Tools* section, click the **Export All Vendors** button.
3. In the *File Download* pop-up dialog, Click **Save** to save the vendor details in *.CSV file format.

Viewing Reports

(Access Privilege: Read/Write permission)

You can directly access some of the standard reports pertaining to Vendors from the *Vendor Reports* section. In addition to reports, you can access one of the dashboards in Vendors module.

By default, the following reports are displayed under Vendors module:

- Vendors Vs Purchases
- Vendors Vs Products

To view vendor reports

1. Click the **Vendors** tab.
2. In the *Vendors: Home* page under the *Vendors Reports* section, click the required Report link.
3. The Report is displayed in Reports page, which can be further customized as per your requirements.

For more details about reports customization, refer to *Chapter 19: Working with Reports*.

Printing Vendor Details

(Access Privilege: Read permission)

You can view a printable form and print the vendor details using browser's Print function.

To print vendor details

1. Click the **Vendors** tab.
2. In the *Vendors: Home* page under the **Vendors List** section, select the required vendor.
3. In the *Vendor: < Vendor Name>* page click the **Printable View** link.
4. In the *Vendor: < Vendor Name>* page, click the **Print** button to print the document.

Deleting Vendors

(Access Privilege: Read/Write/Delete permissions)

Rarely, you may need to remove the unnecessary vendors, which are not tracked further. This will help you manage your vendors in a better way. You can delete vendors either individually or in bulk.

> ⚠️**Warning:** The deleted vendors are temporarily stored in Recycle Bin. If required you can restore the deleted vendors again. However, if you delete vendor from Recycle Bin, you cannot restore again.

To delete vendors individually

1. Click the **Vendors** tab.
2. In the *Vendors: Home* page, select the vendor to be deleted.
3. In the *Vendor: <Vendor Name>* page, click **Delete**.
4. In the *Confirmation* dialog, click **OK** to delete the vendor permanently.

To delete vendors in bulk

1. Click the **Vendors** tab.
2. In the *Vendors: Home* page, go to the *Vendors List* section and select the vendors to be deleted using the **Select** check box.
3. Click the **Delete** button.
4. In the *Confirmation* dialog, click **OK** to delete the selected vendors permanently.

Customizing Vendors

(Access Privilege: Customize ZohoCRM.com permission)

Customization of the vendors module includes, renaming the tab name, modifying the pick list values in standard fields, adding new custom fields, modifying vendors page layout, and show/hide the related list views according to your Purchase management process requirements.

Activities

Activities play an important role in daily business operations. Activities can be either time bound calendar events, such as meetings, seminars, appointments, etc or status bound tasks, such as send status report to manager, send e-mail to customer, etc. In Zoho CRM, most of the records have activities as a related list for a better 360 degrees view. You can associate activities with modules, such as leads, accounts, contacts, potentials, campaigns, etc.

You can perform the following operations in **Activities** module:

- Navigate activities
- Search activities
- Manage tasks
- Manage events
- Delete activities
- Customize activities

Navigating Activities

You can navigate activities from the Activity List.

To navigate activities

1. Click the **Activities** tab.
2. In the *Activities Home* page, under the **Activity List** section, select Tasks or Events from the **View** drop-down list to display the list of tasks or events respectively.
3. In the **Activity List** section, click the Start, Previous, Next, or End link to access the respective list of activities.

Searching Activities

You can search the activities alphabetically or filling the required information in the **Search** box.

To search activities

1. Click the **Activities** tab.
2. In the *Activities Home* page, under *Find Activities* section, specify the search criteria in Search box and click the **Go** button. You can also use the alphabetical search links.
3. In the *Activity List* page, a list of activities is displayed as per your search criteria.

Creating Tasks

Tasks are displayed under the Zoho CRM user's Home page, Activities page, and some of the related modules, such as Leads, Accounts, Contacts, etc.

List of Standard Task-related Fields

In the *Task: Edit* form, you need to specify the task-related information. The following table provides descriptions of the various fields in the form.

Field Name	Description	Data Type
Subject*	Specify the subject of the task. This is a mandatory field.	Text box, alphanumeric (50)
Due Date	Specify the due date of the task.	Date (yyyy/mm/dd)
Priority	Select the priority of the task.	Pick list
Assigned To*	Select the user to whom the task is assigned. This is a mandatory field.	Picklist
Status	Select the status of the task.	Pick list
Select Module	Select the modules other than contact and lead name with which the task is associated.	Pick list
Select Contact/Lead	Select the contact or lead name with which the task is associated.	Pick list
Send Notification Email	Select the check box to send a notification about the task to the Zoho CRM user to whom the event is assigned.	Check box
Description	Specify any additional details about the task.	Text Area (long text)

To create tasks

1. Click the <u>New Task</u> link. Alternatively, click the **Task** button from records, such as leads, accounts, contacts, potentials, cases, and others.
2. In the *Task:* page, specify the task-related information. Refer to <u>List of Standard Task-related Fields</u> section for more details about mandatory fields.
3. Click **Save**. Task details are displayed in Activities page under *Activity List*.

Creating Events

Events are displayed under Zoho CRM user's Home page, Activities home page, Calendar, and other related modules.

You can perform the following operations in Events module:

- Create events (Form filling and quick create options)
- Search events (Alphabetical/Advanced search)
- Navigate events through Events List
- Associate events with other records

List of Standard Event-related Fields

In the *Event: Edit* form, you need to specify the event-related information. The following table provides descriptions of the various fields in the form.

Field Name	Description	Data Type
Subject*	Specify the subject of the event. This is a mandatory field.	Text box, alphanumeric (50)
Event Owner*	Displays the user to whom the event is assigned. This is a mandatory field. This is a mandatory field.	User Name
Start Date & Time*	Specify the starting date and time of the event. This is a mandatory field.	Mini Calendar
End Date & Time*	Specify the completion date and time of the event. This is a mandatory field.	Mini Calendar
Select Module	Select the modules other than contact and lead name with which the event is associated.	Pick List
Venue	Specify the location of the event.	
Select Contact/Lead	Select the contact or lead name with which the event need to be associated.	Lookup
Select Contact/Lead	Select the contact or lead name with which the event need to be associated.	Lookup
Send Notification E-mail	Select the check box to send a notification about the event to the Zoho CRM user to whom the event is assigned.	Check box
Invitees	Specify email ID of the event participants	Lookup, Email ID
Repeat Event	Select this option to repeat the same event in future. Options: Daily, Weekly, Monthly, and Yearly	
Send Reminder	Select this option to send reminder before start of the event.	Pick List

Field Name	Description	Data Type
Description	Specify additional details about the event.	Text Area (32 Kb)

To create events from Activities

1. In Zoho CRM *Home* page, click the <u>New Task</u> link. Alternatively, click the **Task** button from records such as leads, accounts, contacts, potentials, and trouble tickets.
2. In the *Task:* page, specify the task-related information. Refer to the <u>List of Standard event-related Fields</u> section for more details about mandatory fields.
3. Click **Save**. Task details are displayed in Activities page under *Activity List* section.

To create events from Calendar

1. Click the **Calendar**.
2. In the *Calendar* page, by default, **Day View** is displayed. Click the **time** (for example 08:00 hrs), at which you have to set up a event.
3. In the pop-up dialog, select the **event** option, type the subject in **Subject** field, and click the **Save** button.
4. In the *Activity <event Name>* page, click the **Edit** button to update the event details.
5. In the *Activity <event Name>* page, enter the other event related details. Refer to <u>List of Standard event-related Fields</u> section for more details.
6. Click **Save**.

Deleting Activities

Occasionally, you may need to remove some of the unnecessary activities from the Zoho CRM system for a better user experience. You may consider removing activities that are not useful for future reference.

⚠️**Warning:** Deleting activities is a destructive operation, hence use this option judiciously.

To delete activities

1. Click the **Activities** tab.
2. In the *Activities: Home* page, select the activity.
3. In the *Activity: <Activity Name>* page, click **Delete**.
4. In the *Confirmation* dialog, click **OK** to delete the activity permanently.

Printing Activity Details

You can view a printable form and print the activity details using browser's Print function.

To print activity details

1. Click the **Activities** tab.
2. In the *Activities: Home* page, under the **Activity List** section, select the required activity.
3. In the *Activity: <Activity Name>* page, click the **Print Preview** button.
4. In the *Activity: < Activity Name>* page, click the **File -> Print Page** button to print the document.

Customizing Activities

(Access Privilege: Customize ZohoCRM.com permission)

Customization of the activities module includes, renaming the tab name, modifying the pick list values in standard fields, adding new custom fields, and modifying activities (tasks and events separately) page layout as per activity management requirements. For more details refer, *Customizing Zoho CRM*

Working with Reports

In Zoho CRM, standard reports are provided in various modules, which can be either used directly or customized further according to your organization requirements.

You can perform the following operations in *Reports* module:

- View reports
- Create reports
- Create report folders
- Schedule reports
- Delete Reports

Viewing Reports

Zoho CRM provides 30 different standard reports for the benefit of the users, which are present under different module specific folders. You can use the standard reports or can customize as per your business requirements.

List of standard Reports

Report Name	Description
Account and Contact Reports	
Contact Mailing List	Display the list of contact address details.
Key Accounts	Displays the accounts that give you more sales revenue.
Accounts by Industry	Displays the accounts from various industries.
Potential Reports	
Pipeline by Stage	Displays the potentials by their stage.
Potentials Closing by this Month	Displays the potentials that are closing during the current month.
Sales Person's Performance Report	Displays the potentials gained by each sales person.
Lost Potentials	Displays the potentials that are lost.
Potentials by Type	Displays the potentials by their type.
Open Potentials	Displays the potentials that are pending.
Pipeline by Probability	Displays the pipeline of the potentials by their probability.

Report Name	Description
Sales By Lead Source	Displays the sales from various lead sources.
This Month Sales	Displays the sales that has happen during current month.
Today's Sales	Displays the sales that has happen today.
Lead Reports	
Leads By Source	Displays the leads from various sources.
Leads By Status	Displays the leads and their status.
Today's Leads	Displays the leads that are created today.
Leads by Ownership	Displays the leads and the corresponding owners.
Converted Leads	Displays the leads that are converted into Account / Potential / Contact.
Leads by Industry	Displays the leads from various vertical industries.
Activity Reports	
Tasks and Events Report	Displays the leads from various vertical industries.
Campaign Reports	
Campaigns Revenue Report	Display the revenue generated from the campaign.
Campaign Leads	Displays the leads that are generated through the campaign.
Case & Solution Reports	
Popular Solutions	Displays the number of comments for solutions.
Cases By Origin	Displays the cases based upon their origin.
Cases By Status	Displays the cases based upon their status.
Cases By Priority	Displays the cases based upon their priorities.
Cases By Comments	Displays the cases with the number of comments count.
Sales Forecast Reports	
Quarterly Forecast Summary	Displays the quarterly forecasts that include committed amounts, best-case amounts, and pipeline by quarter.
Forecast History Report	Displays the life cycle of the forecast.
Product Reports	
Products by Category	Displays the products based upon their category.
Products by Support Termination date	Displays the products list whose support discontinued during the current month.
Products by Cases	Display the products and with the list of cases associated with the products.

Report Name	Description
Inventory Reports	
Vendors Vs Purchases	Displays the vendors based on the purchases made from the vendors.
Contacts Vs Purchases	Displays the contacts based on purchases.
Purchase Orders by Status	Displays the purchase orders based on their status.
Quotes by Accounts	Displays the quotes based on accounts.
Quotes by Stage	Displays the quotes based on their stages.
Sales Orders by Accounts	Displays the sales orders based on accounts.
Sales Orders by Status	Displays the sales orders based on their status.
Invoices by Accounts	Displays the invoices based on their accounts.
Invoices by Status	Displays the invoices based on their status.

To access standard reports In Reports tab click the specific report (For example, Contact Mailing List from the **Accounts & Contacts** Reports) from the Reports folder (for example, Accounts & Contacts Reports, Potentials reports, and others).

To view the report

1. Click the **Reports** tab.
2. In the *Reports Home* page, select the report from the required module. (For example, **Lead by Source** from **Leads** module). The generated report is displayed with some of the fields.
3. In the generated report view click the **Export to PDF** button to print the report in PDF and **Export to Excel** button to save the report in *.XLS format.

Creating Reports

You can create new module-specific reports linking some of the other cross-functional modules. For example, you can create a report in accounts module linking other modules such as Contacts, Potentials, Quotes, and others.

List of Primary and related Secondary Modules

In the *Create Report* form, you need to specify the primary module and the related secondary modules (optional). The following table provides various primary and related secondary modules.

Primary Module	Secondary Modules
Leads	None
Contacts	Accounts, Potentials, Quotes, and Orders
Accounts	Potentials, Contacts, Products, Quotes, and Invoices
Potentials	Accounts, Contacts, and Quotes
Activities	Contacts
Products	Accounts and Contacts
Cases	Products
Solutions	-
Quotes	Accounts, Contacts, and Potentials
Orders	Contacts
Invoice	Accounts

Types of Report

- **Tabular Report:** Displays the data without any subtotals in the report. Use this type of report to create contact mailing lists, consolidated view of sales pipeline, and others.
- **Summary Report:** Displays the data along with subtotals and other summary information.
- **Matrix Report:** Displays the data summarized in a grid against both horizontal and vertical columns.

Customizing Reports

You can create new reports according to your organization requirements. The customization of reports involves the following steps:

- Select the module and the corresponding cross-functional modules
- Select the report type (Tabular, Summary, or Matrix report)
- Select the report columns
- Group the columns
- Select the arithmetic functions
- Specify the advanced sorting filters
- Save the report in folder

Step 1: To select module and the cross-functional modules

1. Click the **Reports** tab.
2. In the *Reports* home page, click the **Create New Report** button.

3. In the *Create Report* page, do the following:
    1. Select the primary module from the Modules drop-down list
    2. Select the cross-functional modules from the Related Modules list box
4. Click the **Continue** button.

Select Modules

Step 2: To select the report type

1. In the *Create Report* page, under the **Report Type** tab, select one of the following report options:
    o   Tabular Report
    o   Summary Report
    o   Matrix Report
2. Once you have selected the type of report, click the **Columns** tab

Select Report Type (Tabular, Summary, or Matrix type)

Step 3: To select the report columns

1. In the *Create Report* page, select the report columns to be displayed from the **Available Columns** list box to **Selected Columns** list box.
2. In the **Selected Columns** list box, change the fields order (if required).
3. Once you have selected the report columns, click the **Grouping** tab if you are using Summary Report otherwise click the **Columns to Total** tab.

Select Report Columns

Step 4: To group report columns

1. In the *Create Report* page, select click the **Grouping** tab (This is visible only if you have selected Summary reports under the **Report Type** tab).
2. In the *Grouping* page, you can group the columns up to three levels in ascending/descending order.
3. Once you have selected the report columns, click the **Grouping** tab if you are using Summary Report otherwise click the **Columns to Total** tab.

Group Report Columns

Step 5: To select the arithmetic functions

1. In the *Create Report* page, click the **Columns to Total** tab.
2. In the *Columns to Total* section, select the required arithmetic functions, such as Sum, Average, Lowest value, and Largest value for the available columns.
3. Once you have selected the arithmetic functions, click the **Criteria** tab to add additional report filters.

Columns	Sum	Average	Lowest Value	Largest Value
Lead - No of Employees	☑	☐	☐	☐
Lead - Annual Revenue	☐	☐	☐	☐
Product - Unit Price	☐	☐	☐	☐
Product - Commission Rate	☐	☐	☐	☐
Product - Qty/Unit	☐	☐	☐	☐
Product - Qty in Stock	☑	☐	☐	☐
Product - Reorder Level	☐	☐	☑	☐
Product - Qty in Demand	☐	☐	☐	☑
Campaign - Expected Revenue	☐	☐	☐	☐
Campaign - Budgeted Cost	☐	☐	☐	☐
Campaign - Actual Cost	☐	☐	☐	☐
Campaign - Expected Response	☐	☑	☐	☐
Campaign - Num sent	☑	☐	☐	☐

Tabs: Report Type | Columns | Grouping | **Columns to Total** | Criteria

Arithmetic Functions in Report

Step 6: To specify advanced sorting filters

1. In the *Create Report* page, click the **Criteria** tab.
2. In the *Criteria* section, select the additional criteria for the report.
3. Once you have completed the report customization, do the following:
   - o Click the **Run**: To run the customized report. Refer to [Step 7](#) for saving the report in folder.
   - o Click the **Save**: To save the custom report criteria.
   - o Click the **Cancel**: To cancel the report customization.
4. Once you have completed the report customization, you can store the report in a folder.

Add More Criteria

Step 7: To save report in folder

1. In the *Create Report* page, click the **Run** or **Save** button.
2. In the **Save Report** dialog, do the following:
   o **Report Name:** Specify the report name.
   o **Description:** Specify any additional details about report.
   o **Report Folder:** Select the report folder in which the report has to be stored.
3. Click the **Save**. Refer to the Creating Report Folders section for folder creation.

Save Report in Folder

Creating Folders

By default, reports are stored in different categories. You can create personal/public folders so that you can store the frequently used reports in a common folder and access the reports easily

Create Report Folder

To create report folders

1. Click the **Reports** tab.
2. In the *Reports* home page, click the **Create New Report Folder** button.
3. In the *Folder Details* do the following:
    - **Folder Name:** Specify name of the folder.
    - **Description:** Specify additional information about folder.
    - **Accessibility Details:** Select one of the following options:

- **All Users are allowed to view this Template Folder:** Select if you would like to enable the folder access for all the users.
- **Show this Template Folder only to me:** Select if you would like to enable the folder access only to you.
- **Allow the following users to view this Template Folder:** Select the users or user roles that can access the folder.

4. Click the **Save**. The new folder is created where you can add reports.

🖊️**Note:** All the report folders are publicly visible, but the reports within the folder can be made private.

Scheduling Reports

You can send reports to your colleagues and management (non-Zoho CRM users also) periodically within your organization at a scheduled time.

Schedule Reports

In the *Scheduler Configuration* page, you have to configure the schedule reports. The following table provides various field names in scheduling reports.

Field Name	Description	Remarks
Schedule Name	Specify the scheduler name	Mandatory field
Select Report	Select the report from the drop-down list	Mandatory field
Active	Specify the scheduler status	Checkbox

Field Name	Description	Remarks
Start Date	Specify the start date of the scheduling the report	Mandatory field. The standard date format is mm/dd/yy
Start Time	Specify the time at which the report has to generated and sent to the recipients	Mandatory field. The standard time format is hh:mm
Repeat	Specify the frequency of the reports scheduler from the drop-down list. You can select one of the options. Daily, weekly, monthly, yearly, or specified time.	Drop-down list
Recipient Email	By default, the logged in user's name is selected. You can also send the report to the other users by specifying the e-mail IDs.	Specify the e-mail IDs separated by comma

To setup report scheduler

1. Click the **Reports** tab.
2. In the *Reports* home page, click the **Reports Scheduler** button.
3. In the *Scheduled Reports* page, existing schedulers are displayed under the **Scheduled Reports List** section. Click the **New Report Scheduler** button.
4. In the *New Report Schedule* page specify the values (Refer to the Report Scheduler fields table) and click the **Save** button.

Deleting Reports

Periodically you may delete some of the unnecessary custom reports.

To delete reports

1. Click the **Reports** tab.
2. In the *Reports* home page, select the report to be deleted and click the Del link. The selected report is deleted.

Frequently Asked Questions

Q1. What types of reports are available?

Ans: You can create three types of reports namely, Tabular, Summary, and Matrix types of reports.

Q2. How to view reports?

Ans: All the standard and custom reports are available in Reports Home page. You can select the specific reports by clicking the Report link under Report folders.

Q3. Can I store all my personal reports in a folder?

Ans: Yes, you can store all your personal reports in a folder, which can be viewed only by you and users with System Administrator privilege. If required you can also make report folders publicly visible to other users in your organization.

Q4. Can I schedule my reports and send to my colleagues periodically?

Ans: Yes, you can schedule reports delivery. After scheduling, reports are sent to the recipients' e-mail ID with a link to access the specific report from the Zoho CRM - Reports module. You can also send the PDF document to the recipients. For more details on scheduling reports, refer to the Scheduling Reports section.

Q5. Why I am unable to see some of the fields in Reports?

Ans: You may not be able to see some of the fields in reports if your administrator has disabled those fields. You can views fields that are displayed in your page layout. You can see the following set of data: Data to which you have the access (Read/Write) that includes records owned by you and shared by other users to you.

Working with Dashboards

Dashboards are a pictorial representation of your custom report data, which gives a real-time snapshot of your organization's key metrics. Using dashboards, you can easily visualize comparisons, patterns, and trends in sales, marketing, support, and inventory related data. For example, you can visualize at a glance the products that are selling fast over a period, compare the current quarter sales with previous quarter sales, or compare the actual sales to the projected sales.

In Zoho CRM dashboard comprises of different types of two-dimensional and three-dimensional charts (components). These charts are built over the Macromedia Flash technology, which displays the data dynamically. The charts are bar, pie, line, or funnel. The unique feature in the Zoho CRM system is Funnel chart, which can be used to visualize the sales pipeline at various stages intuitively.

Note: Please ensure that your Web browser supports Macromedia Flash. In case the Macromedia Flash is not enabled, Macromedia Flash plug-in icon is displayed on the chart area. By clicking the Flash plug-in icon you can install the Macromedia Flash plug-in.

Limitations:

- Some of the international currency symbols will not display properly.
- Dashboard properties (color, gradient, borders, background etc.) cannot be modified through user interface.
- Dashboards need to be refreshed manually to display the up-to-minute changes.

You can perform the following operations in the *Dashboards* module:

- Create dashboards
- Create dashboard charts
- Modify the existing dashboards
- Drill-down charts
- Zoom out charts
- Manage dashboard folders
- Delete dashboard

Creating Dashboards

(Access Privilege: Read access)

Dashboard is a summary view of the custom report data in your CRM system. It may contain more than one chart. However, ensure that at least one chart is added to the dashboard.

List of Standard Dashboard Components

In the Dashboard home page, the following types of dashboards are available.

Module	Standard Dashboard Components
Leads	• **Leads by Source:** Displays the leads from various sources. • **Leads by Status:** Displays the leads at different status. • **Sales by Lead Source:** Displays the sales from different leads sources. • **Leads by Industry:** Displays the leads from different industries.
Accounts & Contacts	• **Sales by Account:** Displays the sales revenue generated from accounts. • **Accounts by Industry:** Displays the sales revenue generated from accounts by industry.
Potentials	• **Pipeline by Stage:** Displays the sales pipeline in various stages. • **Pipeline by Probability:** Displays the sales pipeline by probability. • **Potentials by Type:** Displays the sales pipeline by type.
Campaigns	• **Campaign Leads:** Displays the leads from different campaigns. • **Campaign Vs Revenue:** Displays the sales revenue from different campaigns.
Cases & Solutions	• **Cases by Origin:** Displays the cases from different sources. • **Cases by Priority:** Displays the cases with different priorities. • **Cases by Status:** Displays the cases with different status.
Products	**Products by Category:** Displays the products of different categories.

Inventory Management	• Vendors Vs Purchases: • Sales Orders by Accounts: • Contacts Vs Purchases: • Purchase Orders by Status: • Quotes by Accounts: • Quotes by Stage: • Invoices by Accounts: • Invoices by Status: • Sales Orders by Status:

Note: You cannot modify or delete the standard dashboards.

To create a dashboard

1. Click the **Dashboards** tab.
2. In the *Dashboards Home* page, click the <u>Go to Dashboard List</u> link.
3. In the Dashboard List page, click the **Create New Dashboard** button.
4. In the New Dashboard page, specify the following:
   o **Name:** Specify name of the dashboard
   o **Select Dashboard Folder:** Select the folder in which the dashboard has to be stored.
   o **Description:** Specify additional details of the dashboard.
5. Click **Save**.

Creating Charts
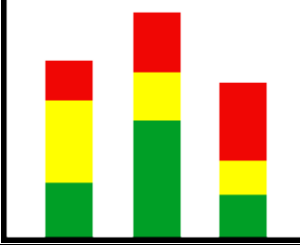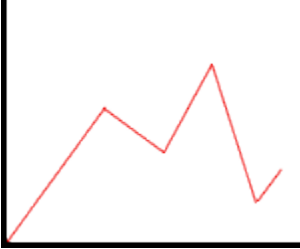
(Access Privilege: Read/Write access)

After creating a dashboard you must add components (charts - represent the exact data in pictorial form), which includes Bar, Pie, Line, Funnel, or Table type charts. You can select the charts to display the data in pictorial form where as table to display the data in tabular format.

Note: In each dashboard, you can create up to 20 charts.

List of Standard Charts

Chart Type	Description	Example

Bar chart	To display different values of one or more items in data, which can be used to compare values across categories.	
Pie Chart	To display the data with different parts of data into triangular areas (sectors) proportional to the percentages of the whole data.	
Line Chart	To display a trend over a period with the variations in the multiple values in a single chart.	
Funnel Chart	To show the convergence of data from the entry level to exit level. It is typically used show the sales pipeline at any point of time.	
Table Chart	To show sum of the values in each category of the data.	**Lead Source** **Record Count** Web Download 48 Advertisement 39 Trade Show 28 Cold Call 22 Sales Mail Aliase 12

To create dashboards

1. Click the **Dashboards** tab.
2. In the *Dashboards Home* page, click the **Add Component** button.

3. In the *Add Component* page, under the *Specify Component Details* section specify the following:
   - o **Component Type:** Select the component type either **Chart** or **Table**.
   - o **Component Header (Mandatory):** Specify the component name.
   - o **Source Report:** Select the custom report to be displayed in dashboard component.
4. Click the **Next**.
5. In the *Add Component* page, under the *Specify Chart Details* section, select the type of chart from the **Select Chart Type** list box. You can select Vertical Bar, Pie, Line, Funnel, or Table.
6. Click the **Finish** button. The new chart is displayed under the Dashboard.

After adding a chart to the dashboard, you can perform the following operations:

- Change to 2-dimensional or 3-dimensional view
- Drill-down the chart
- Zoom out the chart
- Delete the chart

Drilling down dashboards

(Access Privilege: Read access)

You can view the data underlying each dashboard component.

To drill-down dashboards

1. Click the **Dashboards** tab.
2. In the *Dashboards Home* page, select the dashboard from the **Switch to Dashboard** drop-down list.
3. In the *Dashboards Home* page, click the dashboard component area for which you would like to display the report. The drill-down data is displayed in a report form.
4. In the Report page, you can perform additional operations, such as Export to PDF/XLS/CSV, Save the report, customize further, or refresh the data.
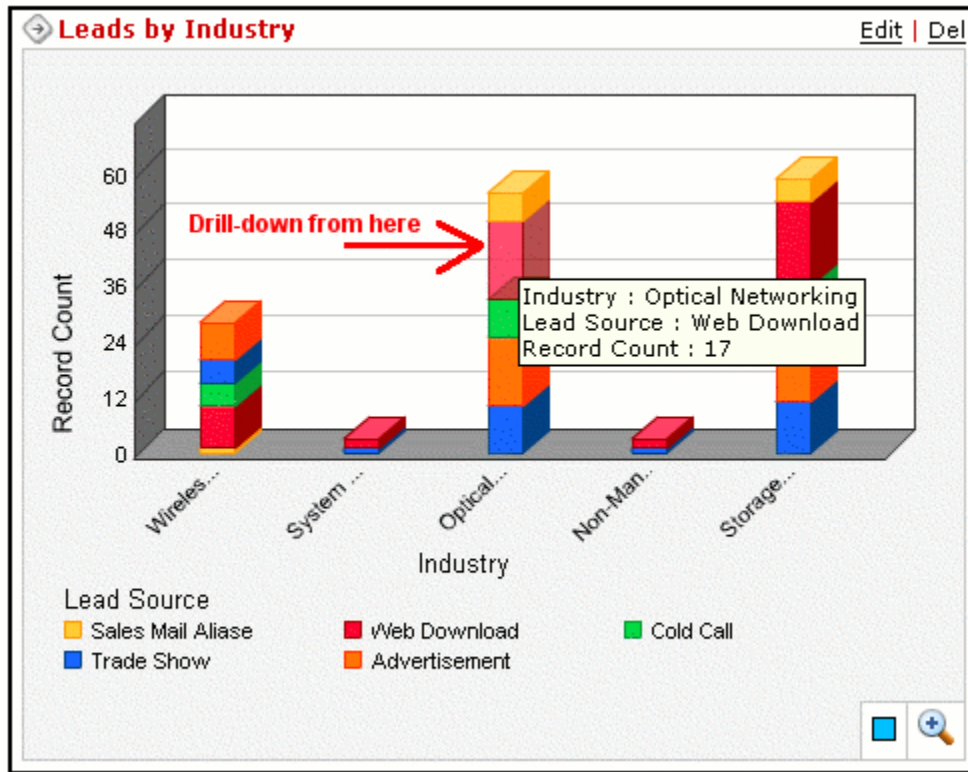
Drill -down Dashboard

Zooming out Charts

You can enlarge the chart for a better visualization of data, which is very useful while working with huge data.

To zoom out chart

1. Click the **Dashboards** tab.
2. In the *Dashboards Home* page, select the dashboard from the **Switch to Dashboard** drop-down list.
3. In the *Dashboards Home* page, under the required chart area click the icon.
4. The enlarged chart is displayed in a separate Window.
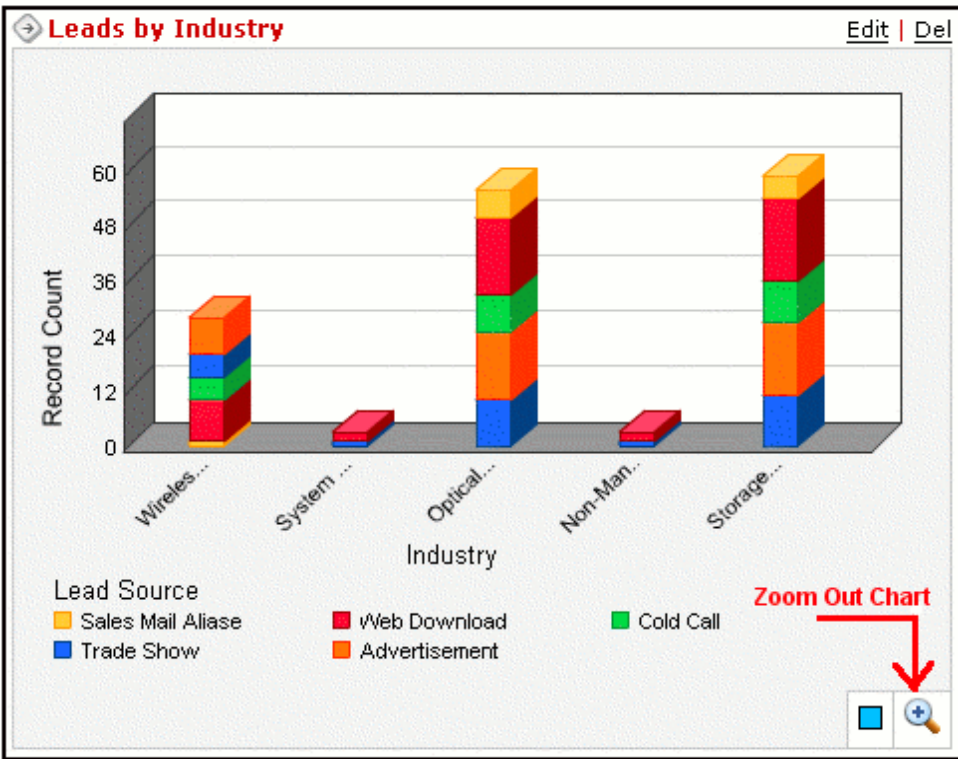
Zoom out chart

Managing Dashboard Folders

(Access Privilege: Read access)

Dashboards can be stored in publicly accessible folders for all the Zoho CRM users or private folders with a limited access to some of the users.

New Dashboard Folder

* Required Field(s)

Dashboard Folder details

* **Folder Name** [Sales|] **New Folder**

Accessibility Details

⦿ All Users are allowed to view this Dashboard Folder.
○ Show this Dashboard Folder only to me.
○ Allow the following users to view this Dashboard Folder.

Users
   Gopal
   Nagarajan Dilip
   gopals
Roles
   Standard User
   Sales Admin

[Add]

✗

Note:
→ All the administrators and the user who created this dashboard folder will have accessibility rights always.

[Save] [Cancel]

Create Dashboard Folder

Note: System administrators and the users who created the dashboard folder have full control on dashboard folders. Other users can access the dashboards only after the owner of the folders enables the access rights.

To create dashboard folder

1. Click the **Dashboards** tab.
2. In the *Dashboards Home* page, click the <u>Go to Dashboard List</u> link.
3. In the *Dashboard List* page, click the **Create New Dashboard** button.
4. In the *Dashboard Folder Details* do the following:
   - o **Folder Name:** Specify name of the folder.
   - o **Accessibility Details:** Select one of the following options:
     - ▪ **All Users are allowed to view this Dashboard Folder:** Select if you would like to enable the folder access for all the users.
     - ▪ **Show this Dashboard Folder only to me:** Select if you would like to enable the folder access only to you.

- **Allow the following users to view this Dashboard Folder:** Select the users or user roles that can access the folder.

5. Click **Save**.

Managing Attachments

File attachments are documents, such as Marketing Collateral, Sales Quotes/Orders/Invoices, SLA, and others that can be associated to the CRM modules.

Notes are the electronic equivalent of paper sticky notes. You can use the notes to write the questions, reminders, and anything you would write on notepaper. These are useful for storing bits of information related to customers, which you may need later.

Attachments and Notes modules are available as a related list under detail view of the record. You can perform the following operations in Attachments and Notes modules:

- Attach Files to the Records
- Delete Attachments
- Associate notes with records
- Delete Notes

Attaching Files to the Records

You can attach documents to the leads, campaigns, accounts, contacts, cases, products, vendors, quotes, orders, and invoices.

Note: You can upload a file of size less than 2 MB.

To attach files to the records

1. Select the record from the required module.
2. In the *Record Detail* page, under *Attachments* section click the **New Attachment** button.
3. In the *<Module>: File Attachment* page, browse the file to be uploaded. You can also add some description about the file.
4. Click the **Upload** button. The attached file is added under *Attachments & Notes* list view.

Deleting Attachments

Occasionally, you may need to remove the unnecessary files from the Zoho CRM system for a better user experience. You may consider removing files that are not useful for future reference.

⚠ **Warning:** Deleting files is a destructive operation, hence use this option judiciously.

To delete attachments

1. In any of the record details view, under Attachments section click <u>Del</u> link.
2. In the *Confirmation* dialog, click **OK** to delete the note permanently.

Associating Notes with Records

In Zoho CRM, you can associate notes to the records by specifying the required details in a note.

List of Standard Note Fields

In the *Note: Edit* form, you need to specify the note-related information. The following table provides descriptions of the various fields in the form.

Field Name	Description	Data Type
Title*	Specify the subject of the note. This is a mandatory field.	Text box, alphanumeric (50)
Body	Specify details about the note.	Text Area (32 KB)

To create notes

1. In any of the record details view, click the **New Note** button.
2. In the *Note: < >* page, specify the note-related information.

   ✎**Note:** Title is a mandatory field. Refer to the <u>List of Standard Note-related Fields</u> section for more details.

3.
4. Click **Save**.

Deleting Notes

Occasionally, you may need to remove the unnecessary notes from the Zoho CRM system for a better user experience. You may consider removing notes that are not useful for future reference.

Warning: Deleting notes is a destructive operation, hence use this option judiciously.

To delete notes

1. In the *Note: <Note Name>* page, click **Delete**.
2. In the *Confirmation* dialog, click **OK** to delete the note permanently.

Setting up Personal Information

Users with any role can perform the following operations in the Zoho CRM system:

- [Modify personal information](#)
- [Change password](#)
- [Change date format](#)
- [Change skins](#)

Modifying Personal Information

While creating a user in the Zoho CRM system your system administrator add some of the mandatory details. You can change your personal information such as, login information, contact information, language, date format, time zone, and password protection settings.

In the *User: <User Name>* form, you need to specify the user-related information. The following table provides descriptions of the various standard fields in the form.

List of User-related Fields

Field Name	Description	Data Type
First Name	Specify the first name of the user.	Text box
Last Name*	Specify the last name of the user. This field is a mandatory field.	Text box
Alias	Specify the other name of the user.	Text box
Zoho CRM ID*	Specify the login name of the Zoho CRM user. This is a mandatory field.	Pick list
Active	Specify the status of the user. By default, the status is active. If required the System Administrator can deactivate the user, so that user cannot access the Zoho CRM system.	Check box
Role*	Select the user role (for example, Administrator, Standard User, and others). This is a mandatory field.	Pick list
Email*	Specify the official E-mail ID of the user. This is a mandatory field.	URL
Website	Specify the website URL of the user.	URL
Phone	Specify the official phone number of the user.	Pick list
Mobile	Specify the mobile phone number of the user.	Text box, integer value

Field Name	Description	Data Type
Fax	Specify the FAX number of the user.	Text box
Date of Birth	Select the date of birth of the user from the mm/dd/yyyy drop-down list	Date box
Street	Specify the primary address of the Zoho CRM user.	Text box
City	Specify the name of the city where the user lives.	Text box
State	Specify the name of the state where the user lives.	Text box
Zip	Specify the postal code of the user's address.	Text box, integer value
Country	Specify the name of the user's country.	Text box
Language*	Select the language. Currently only English language is supported. This field is a mandatory field.	Pick list
Country Locale*	Select the country locale to specify your date format. This field is a mandatory field.	Pick list
Time Zone*	Select the time zone in which you are working. This field is a mandatory field.	Pick list
Secret Question*	Select the secret question for password protection. This field is a mandatory field.	Pick list
Answer*	Specify the answer for retrieving the password in case you forgot it. This field is a mandatory field.	Text box

To change personal information

1. Click the <u>Setup</u> (top RHS corner) link.
2. In the *Setup* page, under the *Personal Settings* section (Left hand-side tree) click the <u>Account Information</u> link.
3. In the *Account Information* page, click the **Edit** button.
4. In the *Edit Account Information* page update your personal information and click **Save**. Refer to List of User-related Fields table for more information about

Changing Password

For security reasons you are strongly suggested to change your password periodically.

Change Password

To change personal information

1. Click the Setup (top RHS corner) link.
2. In *Setup* page, under *Personal Settings* section (Left hand-side tree) click the Change Password link.
3. In the *Change Password* page, specify the old password, new password, and confirm password in Old Password, New Password, and Confirm Password fields respectively.
4. Click **Save**.

Changing Date Format

After logging in first time, you must change the date format as per your organization date & time standard. You can select the date format by selecting your country. The date format is automatically updated with the country locale. The following international date formats are supported:

- dd-mm-yyyy
- mm-dd-yyyy
- yyyy-mm-dd

Date Format

To change date format

1. In Zoho CRM *Home* page, click the <u>Setup</u> link available at top right corner.
2. In *Setup* page, click the <u>Personal Settings</u> link.
3. In the *Personal Settings* page, click the <u>Account Information</u> link.
4. In the *Account Information* page, click the **Edit** button.
5. In the *Edit Account Information* page, select the date format from **Country Locale** pick list.
6. Click **Save**. The date format will be changed for all the date fields in all the modules.

Changing Skins

By default, the Metallic skin is enabled for each user in your organization. You can select one of the six skins (Metallic, Contemporary, Nature, Elegant, Balmy, or Sunrise) according to your wish.
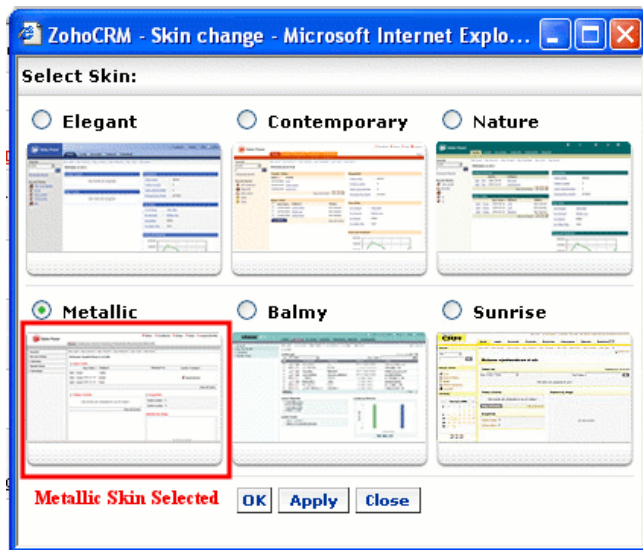
Selecting Skins

To change skins

1. Click the <u>Skin</u> link.
2. In *Zoho CRM - Skin Change* page, select the required skin and click **Apply** to view the new skin and **OK** to permanently change the skin.

System Administration

As part of the Zoho CRM system administration, users with "Administrator" privilege can perform the following operations:

- [Manage users](#)
- [Manage roles](#)
- [Set up company details](#)
- [Import CRM data from other Applications](#)
- [Export Zoho CRM data](#)
- [Customize Zoho CRM](#)
- [Manage Workflow](#)
- [Manage Email Templates](#)
- [Manage Subscriptions](#)

Note: Ensure that you are logged into Zoho CRM system as a System Administrator, otherwise you cannot access the administrator-specific functions.

Managing Users

You can perform the following operations in the **Users** module:

- [Create users](#)
- [Create power users](#)
- [Reset users' password](#)
- [Activate/Inactivate users](#)

Creating Users

In the *User: <User Name>* form, you need to specify the user-related information. The following table provides descriptions of the various standard fields in the form.

List of User-related Fields

Field Name	Description	Data Type
First Name	Specify the first name of the user.	Text box
Last Name*	Specify the last name of the user. This field is a mandatory field.	Text box

Field Name	Description	Data Type
Alias	Specify the other name of the user.	Text box
Zoho CRM ID*	Specify the login name of the Zoho CRM user. This is a mandatory field.	Pick list
Active	Specify the status of the user. By default, the status is active. If required the System Administrator can deactivate the user, so that user cannot access the Zoho CRM system.	Check box
Role*	Select the user role (for example, Administrator, Standard User, and others). This is a mandatory field.	Pick list
Email*	Specify the official E-mail ID of the user. This is a mandatory field.	URL
Website	Specify the website URL of the user.	URL
Phone	Specify the official phone number of the user.	Pick list
Mobile	Specify the mobile phone number of the user.	Text box, integer value
Fax	Specify the FAX number of the user.	Text box
Date of Birth	Select the date of birth of the user from the mm/dd/yyyy drop-down list	Date box
Street	Specify the primary address of the Zoho CRM user.	Text box
City	Specify the name of the city where the user lives.	Text box
State	Specify the name of the state where the user lives.	Text box
Zip	Specify the postal code of the user's address.	Text box, integer value
Country	Specify the name of the user's country.	Text box
Language*	Select the language. Currently only English language is supported. This field is a mandatory field.	Pick list
Country Locale*	Select the country locale to specify your date format. This field is a mandatory field.	Pick list
Time Zone*	Select the time zone in which you are working. This field is a mandatory field.	Pick list
Secret Question*	Select the secret question for password protection. This field is a mandatory field.	Pick list
Answer*	Specify the answer for retrieving the password in case you forgot it. This field is a mandatory field.	Text box

To create users

1. Click the Setup link.
2. In the *Setup* page under **Admin Settings** section, click the Users link.
3. In the *Users* page, click the **Create New User** button.

4. In the <u>Create User</u> page, specify the user specific details. Last Name, User ID, Status, Role, and Email fields are mandatory. Refer to the **List of User-related Fields** table for more details.
5. Click the **Create New User** button. The user login details are sent to the corresponding user's e-mail address.

To modify user details

1. Click on the <u>Setup</u> link.
2. In the *Setup* page under **Admin Settings** section, click on the <u>Users</u> link.
3. In the *Users* page, click the <u>Edit</u> link.
4. In the <u>Edit User</u> page, modify the user specific details. Refer to the **List of User-related Fields** table for more details.
5. Click **Save**.

Creating Power Users

Power users can access all the features available in the Zoho CRM system including functions under **Setup** module. By default, user with "System Administrator" role is one of the power users. If required, you can enable power user privilege to some of the other users also.

To create power users

1. Log in to the Zoho CRM with "Administrator" privilege.
2. Click the <u>Setup</u> link present at the top right corner.
3. In the *Setup* page, under **Admin Settings** section, click the <u>Users</u> link.
4. In the *Users* page, click the <u>Edit</u> link.
5. In the <u>Edit User</u> page, select the **Administrator** role from the **Role** drop-down list and click **Save**. Now the standard user will become one of the System Administrators.

Create Administrator User

Activating/Inactivating Users

Occasionally, in your organization, the users' roles may change or they may move to some other business units. In this case, you have to inactivate those users after changing records ownership to other users.

To inactivate users

1. Log in to the Zoho CRM with System Administrator privilege.
2. Click the Setup link present at the top right corner.
3. In the *Setup* page, under **Admin Settings** section, click the Users link.
4. In *Users:* page, click the Edit link for the user to be inactivated.
5. In the *User: <User Name>* page, clear the **Active** check box.
6. Click the **Save** button. Now the user will be inactivated.

Edit User Details

General Information

First Name: Nagarajan   * Role: Administrator
* Last Name: Dilip   Alias: Dilip
* Zoho CRM ID: dilip@adventnet.com   * Email: dilip@adventnet.com
Active: ☑   Phone:
Mobile: Website:
Fax: Date of Birth: February 20 1973

Address Information:

Street: City:
State: Zip:
Country:

Locale Information

* Language: English
* Country Locale: India
* Time Zone: (GMT 5:30) India Standard Time(Asia/Calcutta)

Save   Cancel

Activate/Inactivate Users

Resetting Password

When the users are unable to retrieve their password due to some reasons (forgot password or unable to provide correct password protection answer) can request the Zoho CRM System Administrator to reset their password. After resetting the password, e-mail will be sent to the registered e-mail ID of the users.

To reset password

1. Click the Setup link.
2. In the *Setup* page under **Admin Settings** section, click the Users link.
3. In the *Users* page, select the user checkbox. You can also select multiple users.
4. Click the **Reset Password** button. The new password will be notified to the recipients.

Managing Roles

In Zoho CRM, role function provides access privilege to various modules, fields, and special functions, such as import, export, merge records, lead conversion, and others. Users associated to the specific role can access functions that are assigned to them.

You can perform the following operations in Roles module:

- Create roles
- Control module-level access
- Control field-level access
- Associate roles to the users

Creating Roles

By default, System Administrator and Standard User roles are provided for the convenience of new users. While creating a role, first you have to associate the existing role to the new role and later you can change the modules and field-level access control. Users with System Administrator privilege can create roles.

Create New Role

Create New Role

To create roles

1. Click the Setup link.
2. In the *Setup* page under **Admin Settings** section, click the Roles link.
3. In the *Roles:* page, under the *Roles List* section click the **New Role** button.

   Note: By default, Administrator and Standard User roles are available in Zoho CRM. You cannot modify these standard roles.

4. In the *Create New Role* page, enter the role name and select the existing role from the **Role Name** and **Existing Role** fields respectively.

5. Click **Save**. The new role is first associated with the existing role. Later you can modify the modules and field-level access control list for the new role.

Controlling Module-Level Access

After creating a role, you must control the access to the modules (Leads, Accounts, Contacts, Potentials, Cases, Solutions, Products, Price Books, Tasks, Events, Forecasts, Vendors, Purchase Orders, Sales Orders, and Invoices), import/export, tools, report access, system administration, and general permissions to the roles. Users with System Administrator privilege can manage the module-level access control lists.

List of system-level access control functions

Field Name	Description
Data Level Permissions	
Everyone can view/edit all users data	To enable/disable users accessing other users records.
Admin only can view/edit all users' data. Others can only view/edit their data alone.	To specifically enable/disable users with Administrator role to access all the users' records and standard users access their own records. If this option is selected standard users cannot access other users' records.
Entity Level Permissions	Select the modules (Leads, Accounts, Contacts, Cases, and others) to be displayed in users work area.
Create	To create records in a module.
Edit	To modify records in a module.
Delete	To delete records in a module.
Import Permissions	
Import My Records	To import records pertaining to the individual users. You can enable/disable import permission for the Leads, Accounts, Contacts, Potentials, Campaigns, Cases, Solutions, Products, Price Books, Vendors, and Attachments.
Import My Organization Records	To import records pertaining to the organization-wide users. You can enable/disable import permission for the Leads, Accounts, Contacts, Potentials, Campaigns, Cases, Solutions, Products, Price Books, Vendors, and Attachments.
Export Permission	To export records pertaining to the organization-wide users. You can enable/disable export permission for the Leads, Accounts, Contacts, Potentials, Campaigns, Cases, Solutions, Products, Price Books, and Vendors.
Tool Permissions	

Field Name	Description
Mass Transfer	To transfer records in bulk from one user to another user. You can enable/disable mass transfer permission for the Leads, Accounts, Contacts, Potentials, Campaigns, Cases, Solutions, Products, Price Books, and Vendors.
Mass Delete	To delete records in bulk from the Zoho CRM system. You can enable/disable mass delete permission for the Leads, Accounts, Contacts, Potentials, Campaigns, Cases, Solutions, Products, Price Books, and Vendors.
Report Permissions	
Manage Reports & Dashboards	To create/modify/delete reports & dashboards and the folders for the reports.
Schedule Reports	To schedule delivery of reports to the intended users.
Admin Permissions	
Manage Users & Roles	To manage users and the corresponding roles.
Change Owner	To change owner in each record view page.
Data Migration	To import the complete data from external application.
View Users Information	To view other users details.
Customize Zoho CRM	To customize the pages, fields and others in various modules.
General Permissions	
Mail Server Configuration	To configure the mail server details. Mail server configuration is not available for On-demand Zoho CRM. It is available only in Packages product.
Export Users	To export user details into CSV format.
Export Notes	To export all the notes into CSV format.
Export Competitors	To export all the competitors details into CSV format.
Import My Attachments	To import user-specific attachments to the records.
Import My Organization Attachments	To import organization-specific attachments to the records.
Convert and Merge Leads	To enable convert and merge options in leads details page.
Mass Change Status Leads	To change the status of the leads in bulk.
Approve Web Leads	To approve the leads captured from Website using Web-to-lead form.
Web To Lead	To create Web-to-lead form for publishing in your Website.
Manage Lead Assignment Rule	To defile lead assignment rules.
Mass Email Leads	To send mass emails to leads.
Mass Email Contacts	To send mass emails to contacts.
Web To Case	To create Web-to-case form for publishing in your Website.

Field Name	Description
Delete Activities	To delete activities in bulk.
Manage Workflow	To setup workflow process for your organization.
Manage Email Templates	To setup mass email templates.
Field Level Access Permissions	To setup field level access permission for the users.

To control module-level access

1. Click the Setup link.
2. In the *Setup* page, under the **Admin Settings** section, click the Roles link.
3. In the *Roles* page, under the *Roles List* section, click either the Edit link to modify the modules list or the role name to view the module-level access control list.

> **Note:** You cannot edit the default roles, such as "Administrator" and "Standard User". These are provided only for your reference. Hence, you are strongly recommended to define your own roles based on the existing default roles.

4. In the *Role Details:<Role Name>* page, the module-level access permissions are displayed.
5. Click the **Edit** button to modify the module-level access for the role.
6. In the *Role Information* page, specify the access permissions for the following:
   - Data Level Permissions
   - Module Level Permissions
   - Import Permissions
   - Export Permissions
   - Tool Permissions
   - Report Permissions
   - Admin Permissions
   - General Permission
   7. Refer to the List of system-level access control functions table.
8. Click **Save** to apply the changes to the role.

Managing Field-Level Access

You can also control the access to certain fields for the roles. This will ensure granular security and users can see the fields that are relevant to their job. For example, "Sales Stage" and "Amount" fields in Potentials module may not be required for a person looking at customer support. Similarly, "Status" of the cases can be hidden for the users other than customer support

persons. Users with System Administrator privilege can manage the field-level access control lists.

Manage Field-level Access Control

To manage field-level access control list

1. Click the Setup link.
2. In the *Setup* page go to the *User Management* section and click the Field Level Access Control link. Under the *Field Level Access Control* section, module-specific (Leads,

Accounts, Contacts, Potentials, Helpdesk, Product, Email, Tasks, Events, and others) links are displayed.
3. Click one of the module links (for example, click the Leads link to modify the field-level access control for Leads module).
4. In the *<Module>: Role* page, click the <u><role name></u> link (for example, "Sales Role").
5. In the *<Module>: Field Level Access* page, list of field-level access is displayed. Click the **Edit** button.
6. In the *<Module>: Field Level Access* page, select or clear the check boxes for the fields according to your organization's field-level access control requirements.
7. Click **Save** to update the changes made to the specific module. Follow the same procedure for other modules also.

Associating Users with Roles

You can associate the role with the users with so that they can access to the modules and fields that are assigned to them. Users with System Administrator privilege can associate role with user.

Assign Role to the User

To associate user with a role

1. Click the <u>Setup</u> link.
2. In the *Setup* page, under the **Admin Settings** section, click the <u>Users</u> link.
3. In the *Users* page, click the <u>Edit</u> link for the specific <u><User Name></u>.
4. In the *User: <User Name>* page, select the role from the **Role** pick list.
5. Click **Save**.

Deleting Roles

You may delete some of the roles from the Roles module that are not required. After deleting a role, users associated to the deleted role will be linked to "Standard User" role. You can delete all the roles except "System Administrator" and "Standard User" roles.

Note: If you delete any role without disassociating the users to the other roles, the specific user's role will be changed to Standard User role.

To delete roles

1. Click the <u>Setup</u> link.
2. In the *Setup* page, under the **Admin Settings** section, click the <u>Roles</u> link.
3. In the *Roles* page, click the <u>Del</u> link for the specific <u><Role Name></u>. The role is permanently deleted.

Managing Company Information

Immediately after signing up with Zoho CRM system, Administrator user is created. With the Administrator user login, you can convert the single user edition to a corporate user edition by adding additional users. Once second user is added in your system, *Company Information* link is enabled where you can specify your company information. The company information is the centralized location where you can specify your organization related information, such as company name, number of employees, address, date, currency, time zone, and other details. In addition, the company information is used to display the address details in printer friendly Quotes, Orders, and Invoices.

Company Information

In the *Company Information* form, you need to specify your company-related information. The following table provides descriptions of the various fields in the form.

List of Company-related Fields

Field Name	Description	Data Type
Name	Specify your company name.	Text box
Primary Contact	Display the person first registered with the Zoho CRM service.	Text box
Alias	Specify the alias name of the primary contact.	Text box
No. of Employees	Specify the number of employees in your company.	Integer
Role*	Select the user role (for example, administrator, standard user, and others).	Pick list
Email*	Specify the official E-mail ID of the user. This is a mandatory field.	Email
Phone	Specify the official phone number of your company.	Text box
Mobile	Specify the mobile number of your company.	Text box
Fax	Specify the FAX number of your company.	Text box

Field Name	Description	Data Type
Website URL	Specify your company Website URL.	URL
Street	Specify the primary address of your company.	Text box
City	Specify the city in which your company is located.	Text box
State	Specify the state in which your company is located.	Text box
Postal Code	Specify the postal code of your company address.	Text box
Country	Specify the name of the country in which your company head quarters is located.	Text box
Currency Locale	Select your country name to display the appropriate currency.	Pick list
Company Logo	Upload your company logo, which can be used as header in your quotes, orders, and invoices similar to letterhead. Maximum allowed size 188 x 80 px.	Browse Image

To set up company information

1. Click the Setup link.
2. In the *Setup* page under the *Admin Settings* section, click the Company Details link.
3. In the *Company Details* page, specify the company details. Refer to Company Information table for more details:
4. Click **Save**.

Note: Currently multiple currency is not supported. You can configure only a single currency.

Frequently Asked Questions

1. How many users I can add in Zoho CRM system?

Ans: You can add the first three users free of cost. From fourth user onwards subscribe to service at $12 per user per month. For more details, refer to *Managing Subscriptions*.

2. I have lost both my password and user ID, how to retrieve my login information?

Ans: If you are a standard user, contact your Zoho CRM System Administrator for resetting the password. If you are administrator, please contact support@zohocrm.com for resetting your password.

3. How to set my language, time zone, date/time formats?

Ans: You can change the organization-wide language, time zone, from the *Company Details* page where as date/time format from the *Account Information* page.

6. How to change my fiscal currency?

By default, the currency is set as US Dollar ($). You can change the currency as per your organization's fiscal currency. To change the currency, select the **Currency Locale** from the *Company Details* page.

Customizing Zoho CRM

You can customize the Zoho CRM user interface according to your organization-wide business (sales, marketing, support, and inventory management) process. The customization includes the following:

- Renaming of tabs according to industry terminology
- Modifying standard fields in various modules
- Adding custom fields to various modules
- Modifying the page layout
- Modifying the related list views

In Zoho CRM, some of the standard fields, pages, related lists, and modules (tabs) are provided for the benefit of administrators to jump start customization of the product. You can customize these functions as per your business process. Before working with customization you must collect your organization-wide sales, marketing, support and inventory management requirements. While planning for the product customization, discuss with CRM users in your organization and understand their exact requirements before Zoho CRM implementation.
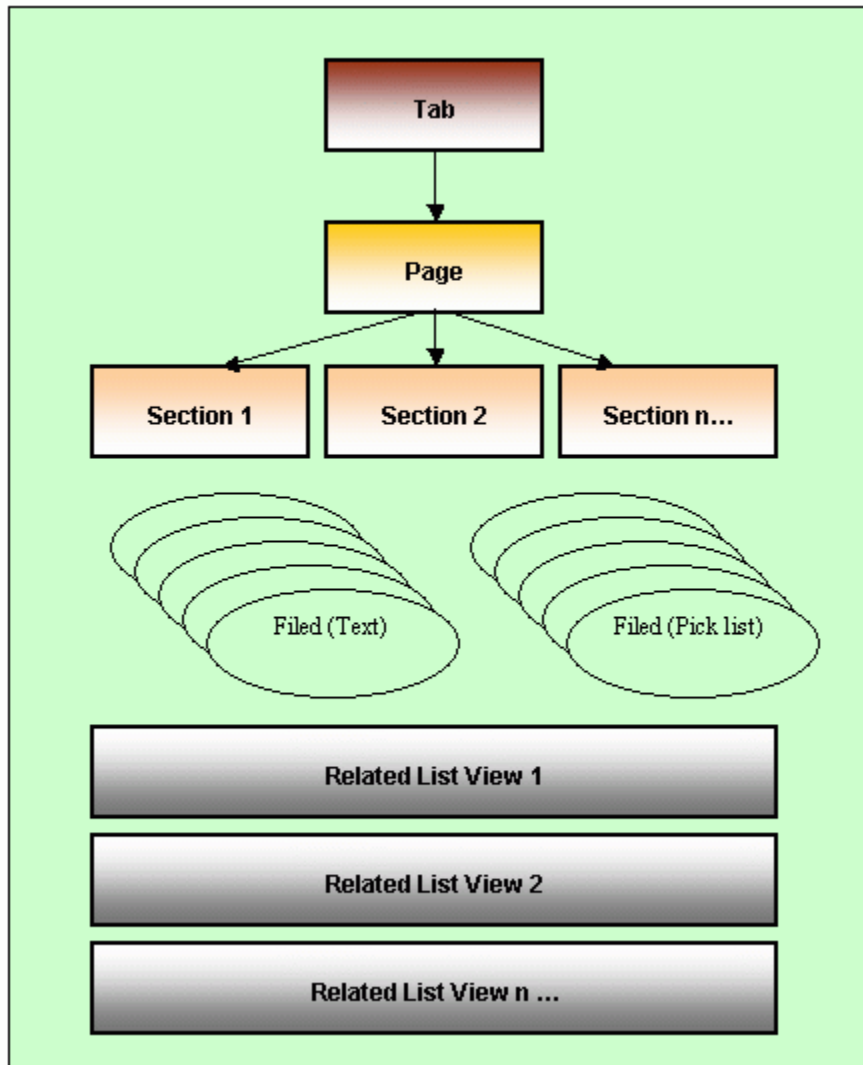
In Zoho CRM, you can perform the following operations in product customization module:

- Rename tabs
- Create custom fields
- Add/modify pick list values
- Customize page layout
- Change tabs order
- Change the related list order
- Modify Default Custom Views

Renaming Tabs

(Access Privilege: Customize ZohoCRM.com permission)

The aim of the any CRM system is to acquire customers with less expenditure, reduce the churn rate, retain customers, and sell more products/services in future. The fundamental philosophy is approximately same across the industries but the terminology used in defining sales, marketing, and support processes may vary slightly.

The Zoho CRM system provides an option to change the standard tab names according to your industry terminology. For example, if you are planning to use the Zoho CRM for a Real Estate business you may change the "Account" tab to "Tenant" where for an Educational Institution may rename as "Parents" and so on. After changing the tab name, the changes are reflected in all the standard pages in user interface except custom reports and dashboards.
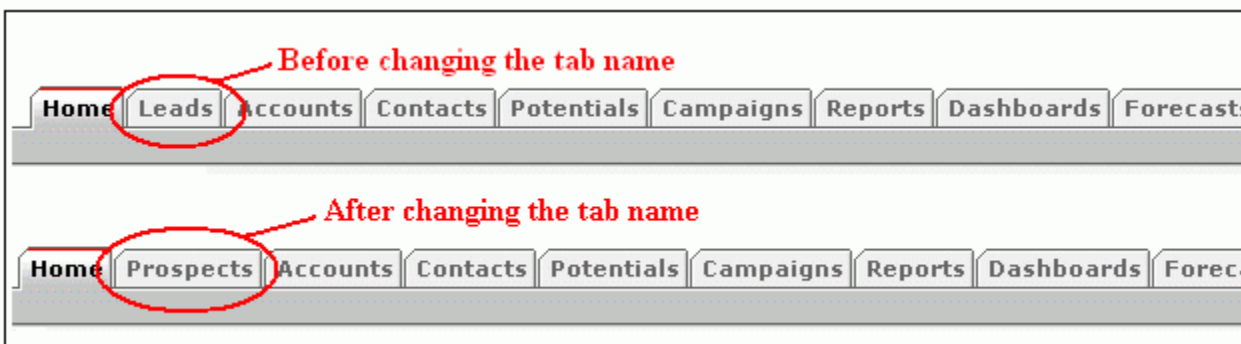
Rename Tabs

To rename tabs

1. Click the Setup link.
2. In the *Setup Home* page, click the Tab Settings link.
3. In the *Tab Settings* page, click the Rename Tabs link.
4. In the *Rename Tabs* page, click the Edit link for the tab name to be changed.
5. In the *Change Tab Name* page, specify the new name in the **New Tab Name** field.
6. Click **Save**. The tab name and other text will be updated according to your changes.

Notes:

*   If you revert/rename the tab name to standard name/new name, the new name will not be updated in custom views, if the custom view is modified after renaming the tab.

- New tab names will not be reflected on Page Layout, Reports, and Dashboards modules. Always standard names are displayed.
- All the field names will also change according to the new name. For example, if you change "Account" tab to "Client", the "Account Name" field will be changed to "Client Name".
- If you change a tab name to plural form with suffix "-ies" (last three characters - right to left), the singular form will be suffixed with "y". For example, if you change "Potentials" to "Opportunities", in all the places the singular form of "Potential" is changed to "Opportunity".

Managing Custom Fields

(Access Privilege: Customize ZohoCRM.com permission)

By default, some of the standard fields are available in each module, which helps you to start working with the CRM system. You may consider adding more industry-specific custom fields according to your business process. You can add custom fields in all the modules except tasks and events modules.

Adding Custom Fields

How many custom fields I can create in each module?

In each module, you can add up to **120** custom fields. The maximum number fields for each type are given below:

- text, pick list, multi-select pick list, email, phone, text area, and URL fields - **50**
- integer, percent, and currency - **15**
- date field - **10**
- check-box - **10**
- lookup - **10**

In the *Setup: New <Module>Edit* form, you need to specify the custom field-related information. The following table provides descriptions of the various fields in the form.

Field Type	Description	Fields
Text	To add Text type fields.	Label: Specify the field name Length: Specify the field size (number of character - Integer)
Integer	To add number type fields.	Label: Specify the field name Length: Specify the field size (Integer)
Percent	To add percentage type fields.	Label: Specify the field name Length: Specify the field size (Integer) Decimal Places: Specify the number of decimal places
Currency	To add currency type fields.	Label: Specify the field name Length: Specify the field size (Integer) Decimal Places: Specify the number of decimal places
Date	To add date type fields.	Label: Specify the field name Format: YYYY/MM/DD **Note:** Date format will be changed according user time zone settings.
Date & Time	To add date & time combination fields.	Label: Specify the field name Format: YYYY/MM/DD HH:MM **Note:** Date format will be changed according user time zone settings.
E-mail	To add E-mail addresses type fields.	Label: Specify the field name Length: Specify the field size (Integer)
Phone	To add phone numbers type fields.	Label: Specify the field name Length: Specify the field size (Integer)
Pick list	To add pick lists type fields.	Label: Specify the field name Pick List Values: Specify the pick list values
Multi-select Pick list	To add pick lists with multiple selection of values	Label: Specify the field name Pick List Values: Specify the pick list values

URL	To add Web site addresses.	Label: Specify the field name
Text Area	To add long text (size: 32 Kb)	Label: Specify the field name
Checkbox	To select a true (checked) or false (unchecked) type value.	Label: Specify the field name
Auto Increment	To add auto-increment type fields	

To add custom fields

1. Click the Setup link.
2. In the *Setup: Home* page select the required <Module> Settings link.
3. In the *<Module> Settings* page click the Fields link. In the *<Module> Fields* page all the available fields are displayed.
4. Click the **New Custom Field** button.
5. In the *Custom Field Settings - New Custom Field* page, do the following:
    1. In **Select Field Type** section, select the field type.
    2. In **Provide Field Details** section, enter the field name, field size, and decimal places in the **Label**, **Length**, and **Decimal Places** fields respectively.

8. Click **Save**. The custom field is added to the respective module. To check the field, select the corresponding module and add/edit the record. The new field added is displayed under **Custom Information** section to enter the required details.

Customizing Pick list Values

(Access Privilege: Customize ZohoCRM.com permission)

By default, some of the industry standard pick list values are available in each module. You can modify the pick list values as per your organization business process and replace the existing value with new value so that records will be associated to new values.

Customize Pick List Values

To add/modify pick list values

1. Click the Setup link.
2. In the *Setup: Home* page, under *<Module> Settings* section, click the Field List link.
3. In the *<Module> List* page, edit the field with data type **Pick List** (For example, **Lead Source** field in the Lead List page).
4. In the *Edit Pick List* page, add/modify values in the **Values** list box. Once you have updated the pick list values you can sort the values alphabetically and use the first values as the default pick list value.
5. Click **Save**.

Example: If you want to add, modify, or delete the pick list values for **Lead Source** field in **Leads** module:

1. Click the Setup link.
2. In the *Setup: Home* page, under *Lead Settings* section, click the Field List link.
3. In the *Lead List* page, edit the Lead Source field.

4. In the *Edit Pick List* page, add/modify values in the **Values** list box. Once you have updated the pick list values for Lead Source you can sort the values alphabetically and use the first values as the default pick list value.
5. Click **Save**.

⚠️**Warning:** If you delete/modify any of the pick list values, records associated with the values are changed to "None" and no longer use the deleted values. Hence, you are strongly recommended to first change the values in records to another value and then delete/modify the pick lists.

Customizing Page Layout

(Access Privilege: Customize ZohoCRM.com permission)

Page customization is one of the most important administrator functions that should be completed before rolling out the CRM system for your organization. You can use the Drag & Drop customization to perform the following operations:

*   **Show/hide fields in pages:** By default all the standard fields are displayed in each module page layout. You can hide some of the standard fields, add new custom fields to the pages, and move fields from one section to other section.
*   **Add/Modify sections in pages:** by default, some of the sections are available in each module. You can add, modify or delete the sections.
*   **Change field navigation:** You can use the tab key to navigate the fields while entering the field details. In each section, the tab navigation order can be configured either to Left --> Right or Top --> bottom.
*   **Change field properties:** You can change the fields to mandatory or optional (read-only). However, you cannot change the property of the standard mandatory fields (For example, **Company** name in Leads module is a mandatory field. You cannot change the **Company** field to read-only).

Drag & Drop Customization

To modify the page layout

1. Click the <u>Setup</u> link.
2. In the *Setup: Home* page, under *<Module> Settings* section, click the <u>Edit Page Layout</u> link.
3. In the Edit Page Layout page, do the following:
   - **Show/Hide fields:** Drag the field to be hidden from the *Page Layout: <Module>* section and drop to the *Field List* section. You can also drag the fields to be shown from the *Field List* section to the *Page Layout: <Module>* section.
   - **Create new sections in page:** Click the **Create New Section** button. In the *Section Information* popup box specify the section name and tab order (Left -->Right or Top -->Bottom) in the **Name** and **Tab Order** fields respectively.
   - **Change the property of the fields:** Select the field to be modified and click the **Edit Field Properties** button. In the *Edit Field Properties* popup box, change the field property to Mandatory or Read-only.
4. Follow the same procedure until you have completed the page layout customization.
5. Click **Save**. The updated the page layout is reflected for all the users in your organization according to their field level access.

Changing Tab Order

(Access Privilege: Customize ZohoCRM.com permission)

You can change the order of the modules according to your organization's business process. You can hide all the tabs except Home tab.
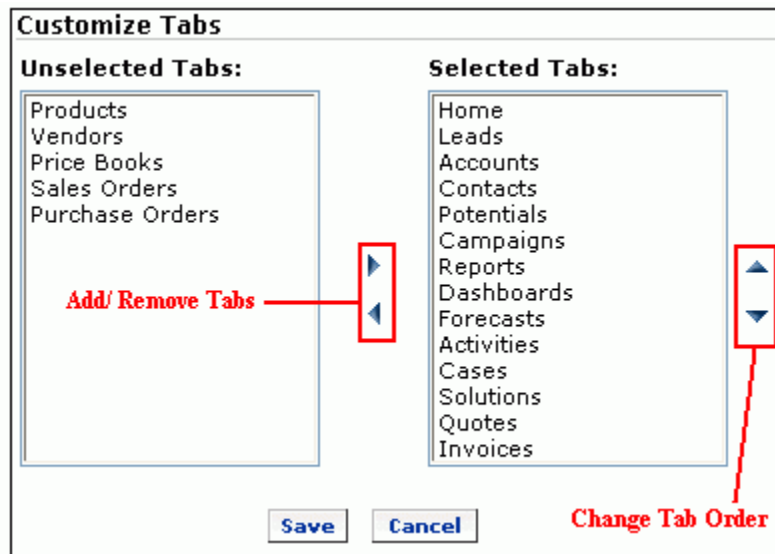
Change Tab Order

To change the tab order

1. Click the <u>Setup</u> link.
2. In the *Tab Settings* section, click the <u>Customize Tabs</u> link.
3. In the *Customize Tabs page*, change the tabs order and show/hide some of the tabs.
4. Click **Save**. Tab order will be changed for all the users.

Changing Related Lists

(Access Privilege: Customize ZohoCRM.com permission)

In each module, you can change the order of the related list views and show/hide some of the related lists as per your requirement.
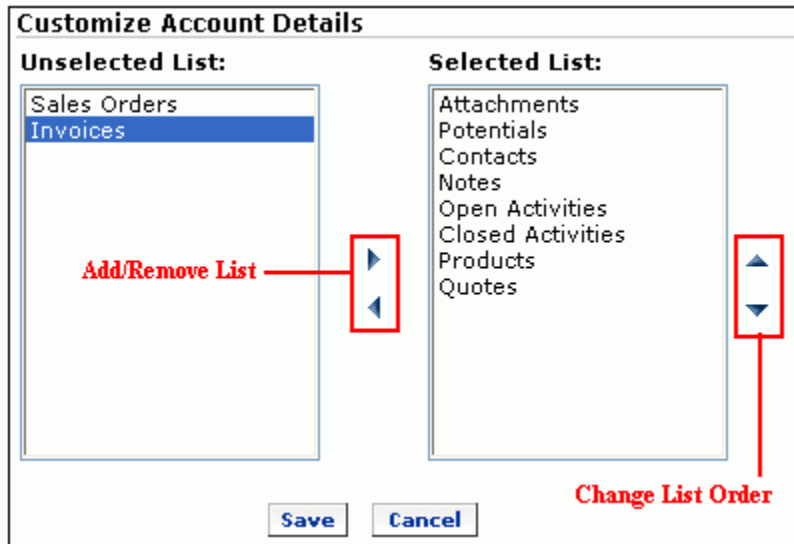
Change Related List Order

To customize the related lists

1. Click the Setup link.
2. In the *Setup Home* page, click the <Module> Settings link. The module can be Lead, Account, Contact, and others.
3. In the *<Module> Settings* section, click the Customize <Module> Details link.
4. In the *Customize <Module> Details* page, change the related list order from the **Selected List** box or hide related lists that are not required.
5. Once you have completed the operation, click **Save**.

Modifying Default Custom Views

(Access Privilege: Customize ZohoCRM.com permission)

By default, some of the standard list views are available in each of the module home pages. You can change the default list view as per your requirements. Whenever user accesses a particular module Home page, the modified list view is displayed.

Leads Custom View Settings

Tip:
→ "New View" which is selected below will be set as default custom view.
→ Whenever the entity list is displayed, this view will be invoked.

Select Default Custom View:

Existing View: **All Open Leads** ———— *Existing View*
New View: [My Leads ▾] ———— *New View*

[Save] [Cancel]

Modify Default Custom View

To modify custom views

1. Click the Setup link.
2. In the *Setup Home* page, click the <Module> Settings link. The module can be Lead, Account, Contact, and others.
3. In the *<Module> Settings* section, click the Custom View Settings link.
4. In the *Custom View Settings* page, change the default view to be displayed from the New View drop-down list.
5. Click **Save**.

Managing Workflow Rules

Workflow management allows you to automate your sales, marketing, support processes, in which the records, tasks are assigned or transferred from one user to another for action, according to a set of predefined rules. The workflow rule is triggered when record meets the specified matching criteria. The key benefits of Workflow are improved efficiency by eliminating many unnecessary steps in records and tasks assignment, better process control by improved business process through standardizing working methods and reduced operating costs.

For example, Zoho CRM provides a sample **Lead Assignment** rule in Leads module (based on Workflow rules) for assigning leads generated through import or web integration to lead owners (Sales Reps) based on different criteria automatically. The matching criteria can be region, country, company, etc. Immediately after matching the criteria, a new task is created and assigned to the lead owner according to company's business process. It will also notify the lead owner about the new lead assignment in an appropriate E-mail template.

Another sample workflow rule in the Zoho CRM system is **Big Deal Alert**. This rule is executed when the Sales Amount and probability of winning the business opportunity crosses the significant value, which can be notified to the management and other colleagues in your Sales team.

You can associate workflow rules with alerts (e-mail message), tasks, or both. To send a notification to the recipients, you must associate an alert to the rule.

You can perform the following operations in Workflow module:

- Manage rules
- Setup alerts
- Add Tasks
- Manage e-mail templates

Note: Workflow rules will be triggered only when you create a new record, update the existing record or both depending upon workflow rule settings.

Managing Workflow Rules

While setting up Workflow rules, first create a rule with suitable matching criteria. You can perform the following operations in *Workflow* module:

- Create/modify/delete workflow rules
- Activate/deactivate workflow rule

To add workflow rule

1. Click the Setup link.
2. In the *Setup Home* page, click the Workflow Settings link.
3. In the LHS tree expand the Workflow Setting link and click the Workflow Rules link.
4. In the *Workflow Rules* page, some of the existing rules are displayed. Click the **New Rule** button.
5. In the *Select Record Type* page, select the module from the Module drop-down list. Click the Next button.
6. In the *New Rule* page, under the *Rule Details* section, specify the following:
    o **Record Type:** Display the module selected in the previous page (*Select Record Type*)
        - Rule Name: Specify the name of the rule
        - Description: Specify additional details about rule.
        - **Active:** Select the Active check box to enable the rule. By default, the check box is selected. If you do not want to enable the rule, disable the check box.
        - **Evaluation Time:** Select one of the following options:
            - **Evaluate this rule when new records are created:** Select this option to trigger the rule when a new record is created.
            - **Evaluate this rule when new records are created and existing records are edited:** Select this option to trigger the rule when record is created/modified.
    o In the *Rule Criteria* section, specify the matching criteria. You can select multiple criteria.
7. Click **Save**. A new workflow rule is displayed where you can add alerts and tasks.

Setting up Workflow Alerts

Workflow alert comprises of an e-mail template, which is used to send mass e-mail notification to all the specified recipients. An E-mail message will be sent to the recipients upon triggering the workflow rule. For each workflow rule, you can associate only one alert (E-mail template).

To add workflow alert

1. Click the Setup link.

2. In the *Setup Home* page, click the <u>Workflow Settings</u> link.
3. In the LHS tree expand the <u>Workflow Setting</u> link and click the <u>Workflow Alerts</u> link.
4. In the *Workflow Alerts* page, some of the existing alerts are displayed. Click the **New Alert** button.
5. In the *New Alert* page, do the following:
6. In the *Alert Details* section, specify the name of the alert and select the E-mail template from the Name and E-mail fields respectively.
7. In the *Recipient Details* section, select the recipients of the alert form the **Available Recipients** list box. You can also notify alert to the other users by specifying E-mail IDs in **Additional Recipients** text box.
8. Click **Save**. An E-mail based alert is created, which can be associated to the workflow rules.

Managing Workflow Tasks

The task can be associated to workflow rule in case you are planning to create a task upon triggering a workflow rule. For new records tasks will be created for the users with a default, values specified the workflow task.

To add workflow task

1. Click the <u>Setup</u> link.
2. In the *Setup Home* page, click the <u>Workflow Settings</u> link.
3. In the LHS tree expand the <u>Workflow Setting</u> link and click the <u>Workflow Tasks</u> link.
4. In the *Workflow Tasks* page, some of the existing tasks are displayed. Click the **New Task** button.
5. In the *New Task* page, specify the following:
    - **Record Type:** Select the module.
    - **Subject:** Specify the subject of the task.
    - **Priority:** Select the priority of the task.
    - **Status:** Select the default status of the task while creating it first time
    - **Due Date:** Specify the date to execute the workflow rule. The due date is a combination
    - **Assigned To:** Select the user to whom the task has to be assigned.
    - **Description:** Specify additional details of the workflow task.
6. Click **Save**. A new workflow task is created, which can be associated to workflow rules.

Managing E-mail templates

As part of the workflow management, notification through E-mail is one of the most important tasks. The E-mail notifications can be predefined so that upon triggering a workflow rule, predefined E-mail will be sent to all the recipients.

Warning: If you are creating E-mail template for sending Emails to leads, do not merge the contact-related fields and vice a versa. If you are trying to merge both fields, you will experience some errors during E-mail creation.

Working with Outlook Plug-in

The Zoho CRM Outlook plug-in is productivity-enhancement software that can be used with Zoho CRM and Microsoft Outlook. The Outlook Plug-in can be installed on users' MS Outlook, which can be used to synchronize the contacts in between Microsoft Outlook and the Zoho CRM and add the contact specific e-mail as a Case to the Zoho CRM customer specific cases.

- Installation Procedure
- Activating Outlook Plug-in in Zoho CRM
- Working with Outlook Plug-in
- Field-Mapping

Installation Procedure

- System Requirements
- Installation Prerequisites
- Installing Zoho CRM Outlook Plug-in
- Uninstalling Zoho CRM Outlook Plug-in

System Requirements

- **Hardware:** x486 with 256 MB RAM or higher with a minimum of 10 MB disk space
- **Operating Systems:** Windows 2000/XP/2003
- **Software:** Microsoft Outlook 2000/2002/2003/2007 and Internet Explorer 6/Internet Explorer 7

Installation Prerequisites

- You must have administrator privileges on the system.
- You must have valid login details to connect Zoho CRM server.
- Microsoft Outlook must be stopped before installing the Outlook Plug-in.

Installing Zoho CRM Outlook Plug-in

1. Log in to your Zoho CRM account.
2. Download the Zoho CRM Outlook Plug-in from the **Setup > Personal Settings > Outlook Plug-in** page.

3. Run the **ZohoCRM_Outlook_Plugin.exe**.
4. In the *Welcome to the Installation Wizard* dialog, click the **Next** button.
5. In the *License Agreement* dialog, read the license agreement and click the **Yes** button if you accept the license agreement.
6. In the *Directory Choose Destination Location* dialog, browse the directory (By default the destination directory is C:\AdventNet\ZohoCRM Outlook Plug-in) in which you want to install Zoho CRM Outlook Plug-in and click the **Next** button. Zoho CRM Outlook Plug-in installation will take a few seconds.
7. In the *Installation Completed* dialog, click the **Finish** button to complete the installation.

Uninstalling Zoho CRM Outlook Plug-in

1. Stop the Microsoft Outlook if it is running.
2. Select **Start > Settings > Control Panel**.
3. In the *Control Panel*, click the **Add/Remove Programs** icon.
4. In the *Add/Remove Programs* dialog, select the **Zoho CRM Outlook Plug-in** and click the **Remove** link. It will take a few minutes to uninstall the Zoho CRM Outlook Plug-in.

Activating Outlook Plug-in in Zoho CRM

(Access Privilege: Administrator)

New User: Sign up for Zoho CRM account from: http://crm.zoho.com/crm/signup.sas
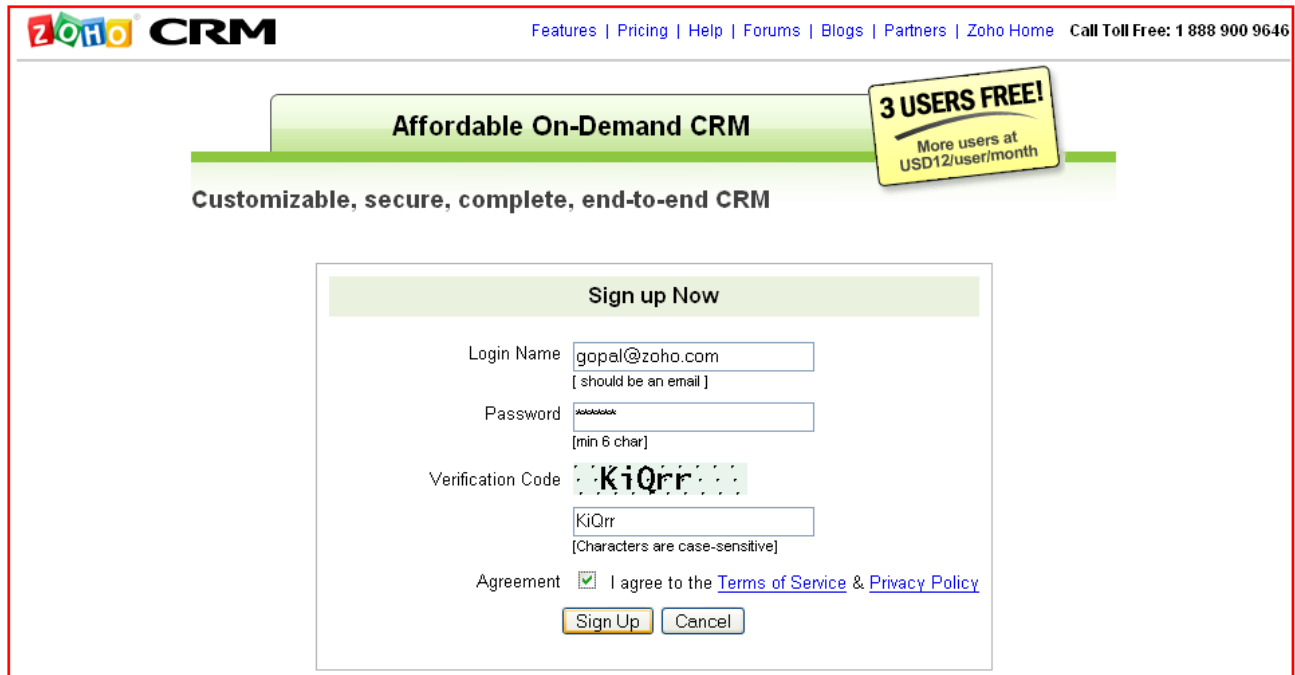
Existing User: After logging in to Zoho CRM activate your Outlook Account from **Setup -->Subscription Manager --> User Activation** page

Working with Outlook Plug-in

Using the Zoho CRM Outlook Plug-in, you can perform the following operations:

- Synchronize Contacts, Tasks, and Calendar between Zoho CRM and Microsoft Outlook
- Resolve conflicts during synchronization
- Add customers-related emails as cases in Zoho CRM
- Modify the email message before adding to Zoho CRM

✏️**Note:** Currently Zoho CRM Outlook Plug-in supports **Microsoft Outlook 2000, 2002, 2003 and 2007** versions only.

Configuring Zoho CRM Server

Before adding or synchronizing Microsoft Outlook E-mails and contacts to the Zoho CRM, specify the Zoho CRM login details in Microsoft Outlook. You can use the Outlook Plug-in to connect the Zoho CRM On-demand service.

To configure Zoho CRM login details

1. Start the Microsoft Outlook.
2. Click the Zoho CRM -> Login menu.
3. In Zoho CRM *Login* dialog, specify your Zoho CRM login details:
   o **Zoho CRM ID**: Enter the user name to log in to the Zoho CRM.
   o **Password**: Enter the password for the user name.
   o **Remember Me**: Select the check box if you want to remember the login details.
   o Click <u>Login Option</u> link to add the Zoho CRM URL. You can select either On-demand Service or Installed Zoho CRM Solution option and specify the exact URL of the service.
4. Click **Save** to apply the changes.

Synchronizing Outlook Contacts with Zoho CRM

Synchronization allows you to enter the customer-specific contacts from Microsoft Outlook to Zoho CRM and vice-a-versa and update the information in both Zoho CRM and Microsoft Outlook. It also eliminates duplication of contacts and resolves conflicts if the data is not in sync.

To synchronize contacts between Microsoft Outlook and Zoho CRM

1. Select the **Contacts** shortcut from the Microsoft Outlook sidebar.
2. Select the required contact(s) from the Inbox.
3. Click the **Zoho CRM -> Sync Contacts** menu.
4. It takes a few minutes to completely read the contacts in Zoho CRM and Microsoft Outlook. Once reading is completed, you have to complete one of the following operations:
   a. Add Contacts
   b. Resolve Conflicts

Adding Contacts

If you are synchronizing contacts first time, then follow these steps:

1. In the *Synchronizing Status* dialog, contacts added, updated, and deleted are displayed. Click the **View Details** button to view the list of contacts.
2. In the *Sync Changes* dialog, list of contacts are displayed. Once you are ensured that all the contact details are correct, click the **Close** button.
3. In the *Synchronizing Status* dialog, click the **Accept Changes** or the **Close** button to complete or abort the synchronization respectively.

Resolving Conflicts

Say, after the first time synchronization, you update the contact details in Zoho CRM or in Microsoft Outlook. Then there will be differences in contact details present in Zoho CRM and Microsoft Outlook. To update the same contact details in Zoho CRM and Microsoft Outlook, you have to override the data in other-side.

To resolve conflict between Microsoft Outlook and Zoho CRM

1. In the *Conflict Resolution* dialog, conflicting contact name and the corresponding fields are displayed in a table. Select the value to be synchronized (either from MS Outlook column or from Zoho CRM). You can select the following options:
    o **Update Outlook Details in Zoho CRM:** To update the changes made in Outlook to Zoho CRM.
    o **Update Zoho CRM Details in Outlook:** To update the changes made in Zoho CRM to Outlook.
2. Click **Save**.
3. Once contacts details are updated click the **Accept Changes** button.

Synchronizing Outlook Calendar with Zoho CRM

Synchronization allows you to enter the customer-specific calendar appointments from Microsoft Outlook to Zoho CRM and vice-a-versa and update the information in both Zoho CRM and Microsoft Outlook. It also eliminates duplication of appointments and resolves conflicts if the data is not in sync.

To synchronize contacts between Microsoft Outlook and Zoho CRM

1. Select the **Calendar** shortcut from the Microsoft Outlook sidebar.
2. Select the required appointments from the Inbox.
3. Click the **Zoho CRM -> Sync Calendar** menu.

4. It takes a few minutes to completely read the appointment in Zoho CRM and Microsoft Outlook. Once reading is completed, you have to complete one of the following operations:
   a. Add Appointments
   b. Resolve Conflicts

Adding Appointments

If you are synchronizing appointments first time, then follow these steps:

1. In the *Synchronizing Status* dialog, appointments added, updated, and deleted are displayed. Click the **View Details** button to view the list of appointments.
2. In the *Sync Changes* dialog, list of appointments are displayed. Once you are ensured that all the appointment details are correct, click the **Close** button.
3. In the *Synchronizing Status* dialog, click the **Accept Changes** or the **Close** button to complete or abort the synchronization respectively.

Resolving Conflicts

Say, after the first time synchronization, you update the appointment details in Zoho CRM or in Microsoft Outlook. Then there will be differences in appointment details present in Zoho CRM and Microsoft Outlook. To update the appointment details in Zoho CRM and Microsoft Outlook, you have to override the data in other-side.

To resolve conflict between Microsoft Outlook and Zoho CRM

1. In the *Conflict Resolution* dialog, conflicting appointment name and the corresponding fields are displayed in a table. Select the value to be synchronized (either from MS Outlook column or from Zoho CRM). You can select the following options:
   o **Update Outlook Details in Zoho CRM:** To update the changes made in Outlook to Zoho CRM.
   o **Update Zoho CRM Details in Outlook:** To update the changes made in Zoho CRM to Outlook.
2. Click **Save**.
3. Once appointment details are updated click the **Accept Changes** button.

Synchronizing Outlook Tasks with Zoho CRM

Synchronization allows you to enter the customer-specific tasks from Microsoft Outlook to Zoho CRM and vice-a-versa and update the information in both Zoho CRM and Microsoft Outlook. It also eliminates duplication of tasks and resolves conflicts if the data is not in sync.

To synchronize tasks between Microsoft Outlook and Zoho CRM

1. Select the **Tasks** shortcut from the Microsoft Outlook sidebar.
2. Select the required task(s) from the Inbox.
3. Click the **Zoho CRM -> Sync Tasks**menu.
4. It takes a few minutes to completely read the tasks in Zoho CRM and Microsoft Outlook. Once reading is completed, you have to complete one of the following operations:
   1. Add Tasks
   2. Resolve Conflicts

Adding Tasks

If you are synchronizing tasks first time, then follow these steps:

1. In the *Synchronizing Status* dialog, tasks added, updated, and deleted are displayed. Click the **View Details** button to view the list of tasks.
2. In the *Sync Changes* dialog, list of tasks are displayed. Once you are ensured that all the task details are correct, click the **Close** button.
3. In the *Synchronizing Status* dialog, click the **Accept Changes** or the **Close** button to complete or abort the synchronization respectively.

Resolving Conflicts

Say, after the first time synchronization, you updated the task details in Zoho CRM or in Microsoft Outlook. Then there will be differences in task details present in Zoho CRM and Microsoft Outlook. To update the task details in Zoho CRM and Microsoft Outlook, you have to override the data in other-side.

To resolve conflict in between Microsoft Outlook and Zoho CRM

1. In the *Conflict Resolution* dialog, conflicting contact name and the corresponding fields are displayed in a table. Select the value to be synchronized (either from MS Outlook column or from Zoho CRM). You can select the following options:
   o **Update Outlook Details in Zoho CRM:** To update the changes made in Outlook to Zoho CRM.
   o **Update Zoho CRM Details in Outlook:** To update the changes made in Zoho CRM to Outlook.
2. Click **Save**.
3. Once contacts details are updated click the **Accept Changes** button.

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Adding E-mail Messages as Cases in the Zoho CRM

You can add customer-specific E-mail messages from Microsoft Outlook to Zoho CRM as a Case. Before adding, the E-mail messages make sure the corresponding contact to the E-mail exists in Zoho CRM.

To add E-mail messages from Outlook to Case in Zoho CRM

1. Select the **Inbox** shortcut from sidebar.
2. Select the customer-specific E-mail message from the Inbox.
3. Click the **Zoho CRM > Add Case to Zoho CRM** menu.

   Note: If the corresponding contact's E-mail address is not available in Zoho CRM, an error message "*No matching contacts for <Email Address>*" is displayed. When this error message is displayed, first add the contact in the Zoho CRM before adding the E-mail message.

4. In the *Add Selected Message to Zoho CRM* dialog, the **Contacts** tab is displayed where the selected E-mail details are displayed.
5. In the *Contacts* table, click the **View** link to view the contact details in Zoho CRM.

   Note: When you click the View link, a default browser is displayed. Here, enter the Zoho CRM login details. First time, it will not display the appropriate contact details. You have to click the **View** link again to view the selected contact details.

6. Sometimes you may not require archiving the complete E-mail in Zoho CRM. In this case, you can modify the E-mail message before adding it to the Zoho CRM. Follow the steps given below to modify the E-mail message:
   1. Select the E-mail message to be modified from the *Contacts* table.
   2. Click the **Edit Message** tab.
   3. Modify the content in the *Edit Message* text area.
7. You can also attach the files related to the e-mail message. Click the **Attachments** tab and view the list of attached files. You cannot attach files with more than 1 MB and delete any attachments.
8. Click the **Add to Zoho CRM** button to add the E-mail message to the selected contact in Zoho CRM.
9. Once the E-mail message is added to Zoho CRM, the "*Successfully Added*" message is displayed. Click the **Close** button to complete the operation.

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Zoho CRM - Outlook Fields Mapping

Contact Synchronization - Field Mapping

Outlook	Zoho CRM	Field Length in Zoho CRM
1. First Name	First Name	40
2. Last Name	Last Name	80
3. Title	Job Title	100
4 . Company Name	Account Name	100
5. Department	Department	50
6. Business Telephone Number	Phone	30
7. Home Telephone Number	Home Phone	30
8. Other Telephone Number	Other Phone	30
9. Business Fax Number	Fax	30
10. Mobile Telephone Number	Mobile	
11. Assistant Name	Assistant	50
12. Assistant Telephone Number	Asst Phone	30
13. Manager Name	Report To	50
14. Business Address Street	Mailing Street	250
15. Business Address City	Mailing City	30
16. Business Address State	Mailing State	30
17. Business Address Postal Code	Mailing zip	30
18. Business Address Country	Mailing Country	30
19. Other Address Street	Other Street	250
20. Other Address City	Other city	30
21. Other Address State	Other state	30

Outlook	Zoho CRM	Field Length in Zoho CRM
22. Other Address Postal Code	Other zip	30
23. Other Address Country	Other Country	30
24. Description	Description	3000
25. Birthday	Birthday	

Task Synchronization – Field Mapping

Outlook	Zoho CRM	Length in Zoho CRM
1. Subject	Subject	120
2. Due date	Due Date	
3. Start date	------------	
4. Priority	Priority	
5. Status	Status	30
6. Description	Description	3000

Calendar Appointments Synchronization – Field Mapping

Outlook	Zoho CRM	Length in Zoho CRM
1. Subject	Subject	120
2. Start Time	Start Date and Time	
3. End Time	End Date and Time	
4. Location	Venue	
5. Description	Description	3000

Managing Subscriptions

In Zoho CRM, you can add the first three users free of cost. From the **FOURTH** user onwards you have to subscribe for the service.

In the *Subscription Manager* section, you can upgrade the free edition (three users) to professional edition by ordering more users on per user per year basis. Before subscribing to the additional users, accept the subscription agreement.

If you are using the Zoho CRM On-demand service, you can perform the following operations:

- [Subscribe for more users](#)
- [Activate/Deactivate users](#)
- [View Order history](#)

Subscribing for more users

In the **Order More Users** form, you need to specify your company related information. The following table provides descriptions of the various standard fields in the form.

List of Standard Subscription-related Fields

Field Name	Description	Data Type
No of Additional Users*	Specify the number of users. This field is mandatory.	Text box, Integer (100)
First Name	Specify the first name of the contact person.	
Last Name*	Specify the last name of the contact person.	
Website	Specify the URL of your company's Website.	URL, alphanumeric (30)
Phone*	Specify phone number of your company with international code.	Text box, alphanumeric (30)
Fax	Specify fax number of your company.	Text box, alphanumeric (30)
E-mail *	Specify the official E-mail address of your company or contact person.	E-mail, alphanumeric and special characters (100)

Billing Address* • Street • City • State • Postal Code • Country	Specify the billing address of your company to send the invoice for your order.	• Street, alphanumeric (250) • City, alphanumeric (30) • State, alphanumeric (30) • Postal Code, alphanumeric (30) • Country, alphanumeric (30)
Shipping Address* • Street • City • State • Postal Code • Country	Specify the shipping address of your company to deliver the service/product.	-Do-
Payment Mode	Select one of the following options: • **Payment on Wire:** To transfer the amount through wire • **Payment by Credit Card:** To pay the amount immediately using your Credit card. • **Payment by Cheque:** To send a cheque for the amount billed for the subscription.	Radio button

To order more users

1. Click the Setup link.
2. In the *Setup* page, under the *Subscription Manager* section, click the Order Users link.

3. In the *Order More Users* page, specify all the mandatory fields. Refer to the List of Standard Invoice-related Fields section for more details.
4. Click **Send Mail** button to process your order. Immediately after submitting your order, the Zoho CRM - Accounting representative will contact you within 24 hr.

Order More Users

Details you fill up here will be sent to Zoho CRM Account manager through mail and you will contacted immediately regarding the order you subscribe.

* Required Field(s)

Required Information:

* No of Additional Users :	10	* Email:	gopals@adventnet.com
First Name:		* Last Name:	gopals
* Phone:	914422435323		
	Eg: +1-888-900-9646		

Additional Information:

Zoho CRM ID:	**gopals@adventnet.com**	Company Name:	**Zoho**
Mobile:		Fax:	
Website:			

Address Information: Copy Address ▾

* Billing Street:	Jagar, Vijayanagar,Velachery	* Shipping Street:	11 Sarathy Nagar, Vijayanag
* Billing City:	Chennai	* Shipping City:	Chennai
* Billing State:	TN	* Shipping State:	TN
* Billing Country:	INDIA	* Shipping Country:	INDIA
* Billing Zip:	600042	* Shipping Zip:	600042

Payment Mode:

Payment on wire: ○   Payment by Credit Card: ◉   Payment by Cheque: ○

Send Mail   **Cancel**

Subscription Order Details

Activating Users

You can activate/deactivate users in your Zoho CRM system according to maximum number of permitted in your subscription. In case you have added more users during evaluation and later decided not to subscribe for all the users, you can deactivate some of the evaluation users, otherwise some of the users cannot access the Zoho CRM system.

To activate users

1. Click the <u>Setup</u> link.
2. In the *Setup* page, under the *Subscription Manager* section, click the <u>Users Activation</u> link.
3. In the *Users List* page, click **Edit**.
4. In the *Users List* page, change the status of the users (Active/Inactive) according to your subscription requirements.
5. Click **Save**.

Viewing Order History

All your previous orders are archived for a better visibility on your user subscription.

To view order history

1. Click the <u>Setup</u> link.
2. In the *Setup* page, under the *Subscription Manager* section, click the <u>Order History</u> link.
3. In the *Order History* page, the old order details are displayed with information such as, order number, start date/end date, amount, and others.

B2C Tutorial

In Zoho CRM, Business-to-Business (B2B) type of business process data is populated. However, customers can customize the CRM business process to Business-to-Consumer (B2C) by using the Zoho CRM Customization tools.

In a typical B2C business process, **Company Name** (**Account Name in Zoho CRM**) is an optional field, hence before using Zoho CRM for B2C type scenario, System Administrator has to customize Leads, Contacts, Potentials, Quotes, Orders, and Invoices modules.

Examples of B2C Companies: amazon.com, ebay.com, or any company directly selling products to consumers.

Sales Flowchart – New Business (B2C)

Sales Flowchart – Existing Business (B2C)
(Cross-Selling & Up-Selling Opportunities)
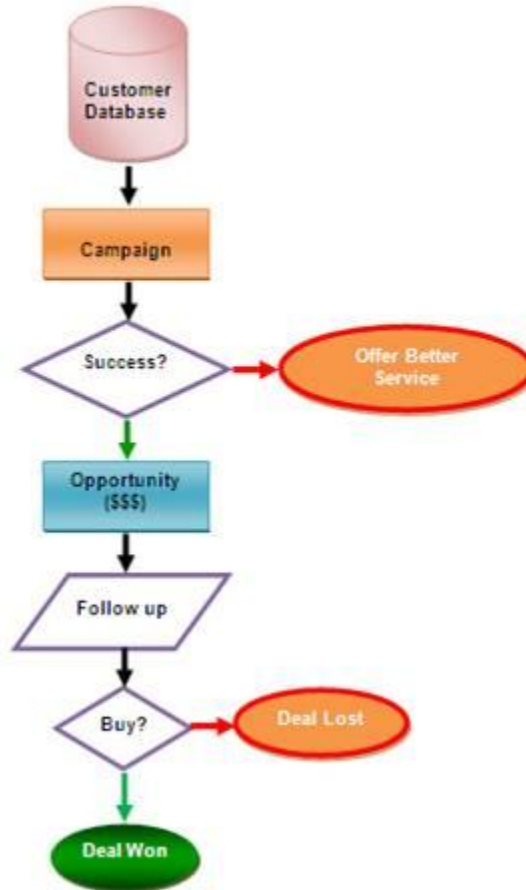
Procedure to customize Zoho CRM for B2C scenario

- [Customize Leads page layout](#)
- [Customize Potentials page layout](#)
- [Customize Quotes, Sales Orders, and Invoices page layout](#)

Step1: Customize Leads Page Layout

1. In Zoho CRM, log in with Administrator privilege.
2. In the *Setup -->Lead Settings* page, click the <u>Edit Page Layout</u> hyperlink.
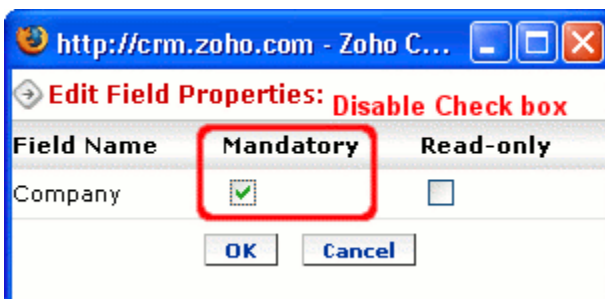
3. In the *Edit Page Layout* page, click on for the **Company** field.

4. In the *Edit Field Properties* pop-up page, disable the **Mandatory** check box for Company field and click **OK**.

5. In the *Edit Page Layout* page, click **Save**.

Step 2: Customize Potentials page layout

1. In Zoho CRM, log in with Administrator privilege.

2. In the *Setup -->Potentials Settings* page, click the <u>Edit Page Layout</u> hyperlink.
3. In the *Edit Page Layout* page, click on 📝for the **Account Name** field.
4. In the *Edit Field Properties* pop-up page, disable the **Mandatory** check box for Account Name field and click **OK**.
5. In the *Edit Page Layout* page, click **Save**.

Step 3: Customize Quotes, Sales Orders, and Invoices page layout

1. In Zoho CRM, log in with Administrator privilege.
2. In the *Setup -->Quotes/Sales Order/Invoice Settings* page, click the <u>Edit Page Layout</u> hyperlink.
3. In the *Edit Page Layout* page, click on 📝for the **Account Name** field.
4. In the *Edit Field Properties* pop-up page, disable the **Mandatory** check box for Account Name field and click **OK**.
5. In the *Edit Page Layout* page, click **Save**.

Once the **Account Name** field is made an optional field, your Sales Reps can associate business opportunities with the Contacts (Consumers) as per B2C process.

If you are looking for a personalized walk through of Zoho CRM implementation for B2C process, please contact us at: <u>support@zohocrm.com</u>

Personalize your Company Logo

Zoho CRM allows customers to personalize the user interface by replacing the default logo with their own company logo, so that employees working with Zoho CRM service will have a personalized feel with their CRM service.

Before Personalization of Company Logo

After Personalization of Company Logo

How to personalize company logo?

1. Log in to Zoho CRM with Administrator privileges.
2. Click on the **Setup --> Admin Settings --> Company Details** link.
3. In the *Company Details* page, change the default Zoho CRM logo with your company logo.
4. Click **Save**. Now your company logo will be displayed on LHS corner of your CRM service.

Important Note:

- For a better visibility of the user interface, use 188 x 80 pixels size image
- The file format should be .jpeg, .jpg, .png, or .gif

One Step CRM Data Export

No Data Lockup, Export your CRM Data at anytime

Zoho CRM provides data export (multiple CSV files for modules) functionality for all the CRM modules free of cost. After exporting the data, you can perform further analysis or back up in your own servers.
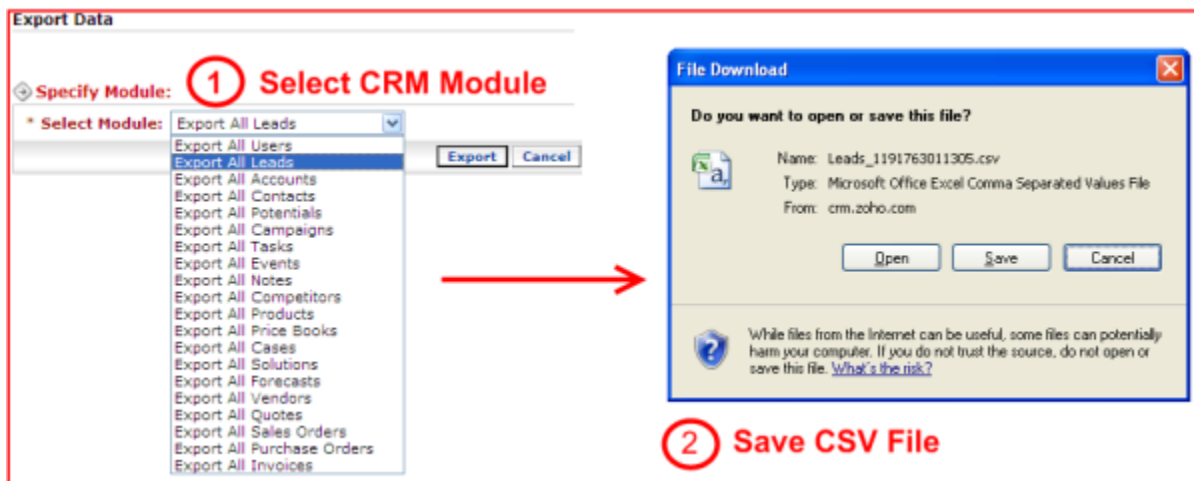
Requesting CRM Data Export

(Available for all editions. Price: USD 10 per request)

You can use the **One-step CRM data Export** utility to export your complete CRM data in a single step. Your data export request will be processed once your payment is approved. After downloading data from your Zoho CRM account, you can back up periodically in your dedicated servers.

Data Export Guidelines

- CRM Administrator must request for the data export from Zoho CRM account.
- After receiving the request, Zoho CRM - Representative will verify the request and send a confirmation email to CRM Administrator with payment details.
- After successful payment, data will be uploaded to the **Secured Zoho CRM - File Server** and notification email will be sent to the CRM Administrator within 8 hrs.

- After receiving the data export email, CRM Administrator must log in to their Zoho CRM account and download the data within 48 hours.

File Format: CRM data will be in the **Comma Separate Value (*.CSV)** format compressed in a single archive (*.ZIP) file. CSV file can be opened in Text Editor or Spreadsheet program.

How to Order Data Export?

1. Log in to your Zoho CRM account with Administrator privilege.
2. Click on the **Setup --> Data Administration Tools --> Export All Data** link.
3. In the *Data Export Requisition* page, your Name, Login ID, and your Email ID are displayed (non-editable) based on your Personal Information settings. Please enter **No. of Export Requests, Contact Number,** and **Reason** for data export for verification purpose.
4. Click on the **Submit** button.

   Zoho CRM - Representative will contact you within 8 hours and send you data export procedure email.

Zoho CRM - Printing Mailing Labels

Zoho CRM helps you to Print Mailing Labels on-the-fly based on your customer data

Mailing labels are commonly used on letters and packages to identify the addressee and the sender information. These labels are used for various business purposes, such as sending monthly billing statement to your customers, sending Greeting Cards during Christmas & New Year, or a direct mailer campaign about newly launched customer referral program. In all these scenarios, you have to either manually type mailing addresses on a plain paper or use a different software to fetch addresses from your customer database, insert addresses in a word processor and then use a good quality printer to print the labels.

Zoho CRM – Print Mailing Labels function helps you to print mailing labels based on the existing customer data. You do not require any additional software except Zoho CRM account and a good quality laser printer.
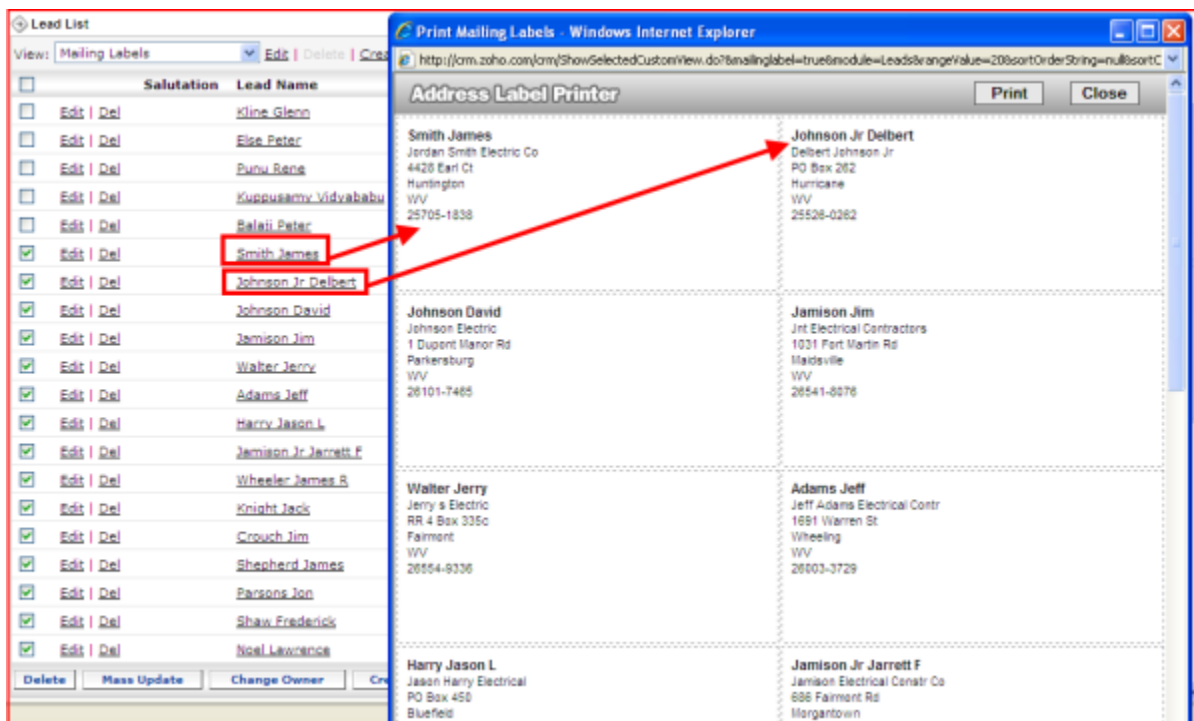
To print mailing labels from leads

1. Click the **Leads** tab.
2. In the *Lead List* view, select the **Mailing Labels** view.

3. In the *Lead List* view, increase the Records per page to 50, select the leads, and then click the **Print Mailing Labels** button.
4. In the *Print Mailing Labels* page, click the **Print** button.
   If you would like to print labels for more than 50 leads, use the page navigation option in list view.

To print mailing labels from contacts

1. Click the **Contacts** tab.
2. In the *Contact List* view, select the **Mailing Labels** view.
3. In the *Contact List* view, increase the Records per page to 50, select the contacts, and then click the **Print Mailing Labels** button.
4. In the *Print Mailing Labels* page, click the **Print** button. If you would like to print mailing labels for more than 50 contacts, use the page navigation option.

Important Notes:

- You can use the default Zoho CRM page settings: A4 size paper, 2-column layout, and 10 mailing labels per page.
- Before printing mailing labels, ensure that printer is connected to your Computer.
- Currently default mailing label layout (2 columns, 10 per column) is provided, which will be made customizable in future updates.
- In the current release, Print Mailing Label function is available only for leads and contacts modules. In future updates, this function will be added in Accounts and Vendors modules, so that you can print mailing labels based on your customer companies and suppliers.