

The Zoho CRM QuickStudy Guide

Using Zoho Everyday

13

How Did "Quick" Get Included in the Book Name?.....	15
Understanding Why.....	15
Using This QuickStudy Guide... Hey, Don't Skip This.....	15
What is CRM?	16
Is Zoho the Right Choice?.....	16
How is Zoho CRM different than MS Outlook™ or Gmail™?.....	17
Which Zoho CRM Edition Do You Need?.....	17
Everyday Scenario.....	19
Getting Started with Zoho CRM.....	21
Logging In	21
Zoho Screen Elements	22
Menu	22
What is a Module?	24
Getting Started.....	24
Leads.....	25
Leads List View.....	25
Left Filter Panel.....	25
Leads Detail View	26
Editing Records.....	29
Lead Detail Layout	30
Moving Around.....	31
Notes.....	31
Other Related Items.....	33
Interacting with the Lead.....	35
Emailing	35
Understanding Activities	37
Task	37
Event.....	38
Call History.....	40
Moving Between List View and Detail View.....	42
Viewing Activities	42
Activities List View.....	43
Calendar View.....	45
Working with Activities	47
Working with Activities in Detail View	47
Completing Activities in List View	49
Recent Items	51
Checking the Social Stream.....	52
Working with SalesSignals.....	53
Converting Leads to Contacts.....	54
Contacts.....	57
Duplicating Contacts	58
Creating New Contact Records	59

<i>Accounts</i>	60
<i>Account Fields</i>	61
<i>Deleting Records</i>	61
<i>Deals</i>	62
<i>Updating your Deal</i>	64
<i>Searching Your Database</i>	67
<i>Changing Fields that Display in Search Results</i>	69
<i>Search by Alphabet</i>	69

List Views

71

<i>Working with the List View</i>	73
<i>Selecting Single Records</i>	73
<i>Modifying List Views</i>	74
<i>Filtering Records Using the Smart Filters</i>	75
<i>Creating New List Views</i>	77
<i>Last Activity Time</i>	80
<i>Search Criteria Operators</i>	80
<i>Advanced View Criteria Scenarios</i>	82
<i>Have too many view names?</i>	84
<i>Import Data</i>	85
<i>Import vs Migrate</i>	85
<i>To Import a Spreadsheet File</i>	85
<i>Preparing the Excel File</i>	85
<i>Assigning Record Ownership</i>	86
<i>Formatting Date Fields</i>	86
<i>Preparing Number or Currency Fields</i>	87
<i>Preparing Check Mark Fields</i>	87
<i>Final Clean Up Recommendations Before Importing</i>	87
<i>Converting the Excel File to .CSV file</i>	87
<i>Time to Import the Prepared File</i>	88
<i>Updating the Associated Modules</i>	91
<i>Limited Practices</i>	91
<i>What else can you do with List Views?</i>	92
<i>Tools</i>	92
<i>Mass Transfer</i>	92
<i>Mass Delete</i>	93
<i>Mass Update</i>	94
<i>Mass Convert (Leads Module Only)</i>	94
<i>Assignment Rules</i>	95
<i>Mass Email</i>	95
<i>Schedule Mass Email</i>	96
<i>Autoresponders</i>	96
<i>Approve Leads (or Contacts)</i>	98
<i>Deduplicate Leads (or Contacts or Accounts)</i>	98
<i>Zoho Sheet View – aka Export</i>	99
<i>Print View</i>	101

<i>Using Tools on Selected Records</i>	101
<i>Run Macro for Selected Records</i>	101
<i>Send Mail to Selected Records</i>	102
<i>Create Task for Selected Records</i>	102
<i>Tools Option for Selected Records</i>	103
<i>Mass Update Selected Records</i>	103
<i>Change Owner for Selected Records</i>	104
<i>Update Response for Selected Records</i>	104
<i>Print Mailing Labels</i>	104
<i>Mail Merge to Selected Records</i>	105
<i>Share Selected Records</i>	106
<i>Revoke Sharing</i>	107
<i>Delete Selected Records</i>	107
<i>Using Tools on the Current Record</i>	107
<i>Clone Current Record</i>	108
<i>Share Current Record</i>	108
<i>Delete Current Record</i>	109
<i>Print Preview Current Record</i>	110
<i>Find & Merge Duplicates</i>	110
<i>Mail Merge from the Current Record</i>	111
<i>Meet Now!</i>	113
<i>Run Macro</i>	114
<i>Customize Business Card, Organize [module] Details, Add Related List</i> 114	
<i>Home View</i>	115
<i>Customizing Your Home View</i>	116

Reviewing Other Modules 121

<i>Activities Module</i>	123
<i>Events</i>	123
<i>Completing Events</i>	127
<i>Tasks</i>	128
<i>Completing Tasks</i>	130
<i>Calls</i>	130
<i>Completing Calls</i>	132
<i>Feeds</i>	133
<i>Left Filter Panel Options for Feeds</i>	134
<i>Chat</i>	135
<i>Reports</i>	139
<i>Creating Reports</i>	142
<i>Adding a Chart</i>	146
<i>Creating Report Folders</i>	148
<i>Scheduling Reports</i>	150
<i>Dashboards</i>	151
<i>Campaigns</i>	156
<i>Campaigns Scenario</i>	157
<i>Zoho Campaigns App Scenario</i>	160

<i>Documents</i>	161
<i>Folders</i>	162
<i>Managing File Revisions</i>	163
<i>Emails</i>	166
<i>Emails on the Lead or Contact Record</i>	166
<i>Mail Magnet</i>	167
<i>Email Module</i>	167
<i>Cases</i>	168
<i>Activities for Cases</i>	170
<i>Timeline</i>	170
<i>Solutions</i>	171
<i>Inventory Management</i>	172
<i>Products</i>	172
<i>Associating Products</i>	176
<i>Importing New and/or Updating Existing Products</i>	176
<i>Price Books</i>	177
<i>Vendors</i>	179
<i>Quotes</i>	180
<i>Quote Header/Footer Info</i>	181
<i>Product Details</i>	181
<i>Tools, Print Preview</i>	183
<i>Tools, Export to PDF</i>	184
<i>Tools, Send Mail</i>	184
<i>Convert to Sales Order or Invoice</i>	185
<i>Sales Orders</i>	185
<i>Invoices</i>	186
<i>Purchase Orders</i>	186
<i>PO Tools Menu</i>	187
<i>Forecasting</i>	187
<i>Social Monitoring</i>	189

Setup-General Setup **193**

<i>Getting Set Up</i>	195
<i>Tools, Setup, General, Personal Settings</i>	195
<i>Company Details</i>	198
<i>Email Settings</i>	199
<i>Email Module</i>	199
<i>POP vs. IMAP</i>	200
<i>Google Apps</i>	203
<i>Outlook</i>	204
<i>SalesInbox</i>	204
<i>BCC Dropbox</i>	207
<i>Email Insights</i>	208
<i>GameScope</i>	210

Setup-Users and Control **215**

<i>Users & Control</i>	217
<i>Users</i>	217
<i>CRM Plus Accounts</i>	219
<i>Groups</i>	220
<i>Activate Users</i>	221
<i>Security Control</i>	221
<i>Profiles</i>	221
<i>Roles</i>	223
<i>Data Sharing Settings</i>	225
<i>Data Sharing Rules</i>	226
<i>Zoho Mail Add-on Users</i>	227
<i>Back to Users</i>	228
<i>Territory Management</i>	229
<i>Methods for Sharing Records</i>	230
<i>Territories</i>	230
<i>Territory Rules</i>	231
<i>Assign Territories</i>	232

Setup-Customization **235**

<i>Module Basics</i>	237
<i>A Word of Caution</i>	237
<i>Definitions</i>	237
<i>The Layout Designer</i>	237
<i>Arranging Your Layouts</i>	239
<i>Some Thoughts on Field Design and Layouts</i>	239
<i>Sections</i>	242
<i>Custom Fields</i>	243
<i>Field Types</i>	244
<i>Single Line</i>	244
<i>Multi Line</i>	244
<i>Email</i>	244
<i>Phone</i>	245
<i>Pick List</i>	245
<i>Multi Select</i>	245
<i>Date</i>	245
<i>Date Time</i>	245
<i>Number</i>	245
<i>Auto Number</i>	245
<i>Currency</i>	245
<i>Decimal</i>	246
<i>Percent</i>	246
<i>Long Integer</i>	246
<i>Check Box</i>	246
<i>URL</i>	246
<i>Formula</i>	246
<i>Lookup</i>	246

<i>Field Properties</i>	247
<i>Required Fields</i>	247
<i>Unique Fields</i>	248
<i>Set Field Permissions</i>	249
<i>Creating Matching Fields for Leads</i>	250
<i>Mapping Lead Fields</i>	251
<i>Modifying Field Properties</i>	252
<i>Adding and Updating Pick List Options</i>	253
<i>Working with Lookup Fields</i>	254
<i>Managing Related Lists</i>	256
<i>Working with Formula Fields</i>	257
<i>Formula Calculation</i>	259
<i>Working with Existing Fields</i>	259
<i>The Field List</i>	259
<i>Removing Fields from the Layout</i>	260
<i>Modifying Deal Stages</i>	261
<i>Assigning Probabilities</i>	262
<i>Defining Contact Roles</i>	264
<i>Module Summary of Changes</i>	265
<i>Creating Alternate Layouts</i>	265
<i>Alternate Layout vs Field Permissions</i>	266
<i>Creating Links & Buttons</i>	268
<i>Links</i>	268
<i>Buttons</i>	270
<i>Creating Custom Modules</i>	271
<i>Tweaking associated settings for your new module</i>	273
<i>Tab Settings</i>	273
<i>Organize Modules</i>	273
<i>Tab Groups</i>	274
<i>Web Tabs</i>	275
<i>Rename Modules</i>	276
<i>Mail Templates</i>	277
<i>Email Templates</i>	277
<i>Some Email Template Formatting Thoughts</i>	280
<i>Including a Zoho Survey Link</i>	280
<i>What is the Footer Used For?</i>	281
<i>Manage Email Template Folders</i>	283
<i>Email Template Analytics</i>	285
<i>Inventory Templates</i>	286
<i>Making More Elaborate Quote Formatting Changes</i>	287
<i>Mail Merge Templates</i>	288
<i>Copy Customization</i>	290
Setup-Automation	293
<i>Automation: Making Your Team More Productive</i>	295
<i>Workflow Automation</i>	295

<i>Workflow</i>	296
<i>Creating a Workflow</i>	297
<i>Macros</i>	308
<i>Schedules</i>	309
<i>Web Forms</i>	310
<i>Auto-Response Rules</i>	313
<i>Unsubscribe Form</i>	313
<i>Assignment Rules</i>	314
<i>Case Escalation Rules</i>	316
<i>Approval Processes</i>	319

Setup-Extensions & APIs **327**

<i>Zoho Apps</i>	329
<i>Advanced CRM Gamification (aka Motivator)</i>	329
<i>Zoho Projects</i>	329
<i>Zoho Support Desk</i>	330
<i>Zoho Survey</i>	330
<i>Zoho Writer</i>	330
<i>Zoho Finance Suite</i>	330
<i>Build Custom Apps</i>	331
<i>Visitor Tracking (aka SalesIQ)</i>	331
<i>Advanced CRM Analytics</i>	332
<i>Setting up Zoho Campaigns</i>	332
<i>Setting up Zoho Campaigns</i>	333
<i>Connecting Google Apps to Your Organization</i>	337
<i>Setting Up Individual Users</i>	338
<i>Setting Up Google AdWords Integration</i>	340
<i>Social Integration</i>	342
<i>Marketplace</i>	343
<i>Others</i>	343
<i>Plug-in for Microsoft Outlook</i>	343
<i>Phone Bridge</i>	344
<i>Mobile Apps</i>	345
<i>Plug-in for Microsoft Office</i>	345
<i>APIs</i>	346

Setup-Data Administration **347**

<i>Import / Migrate</i>	349
<i>Import History</i>	350
<i>Export</i>	350
<i>Export Data</i>	350
<i>Data Backup</i>	350
<i>Storage Usage</i>	351
<i>Recycle Bin</i>	351
<i>Audit Log</i>	352
<i>That's It</i>	352

Appendix	353
<i>My Today Activities View</i>	355
<i>Preparing Excel Files</i>	355
<i>Proper () Function</i>	355
<i>Text to Column</i>	357
<i>Concatenate</i>	358
<i>Formatting the ZIP code field</i>	360
<i>Removing Non-printing Characters</i>	360
Procedures	363
Index	371
