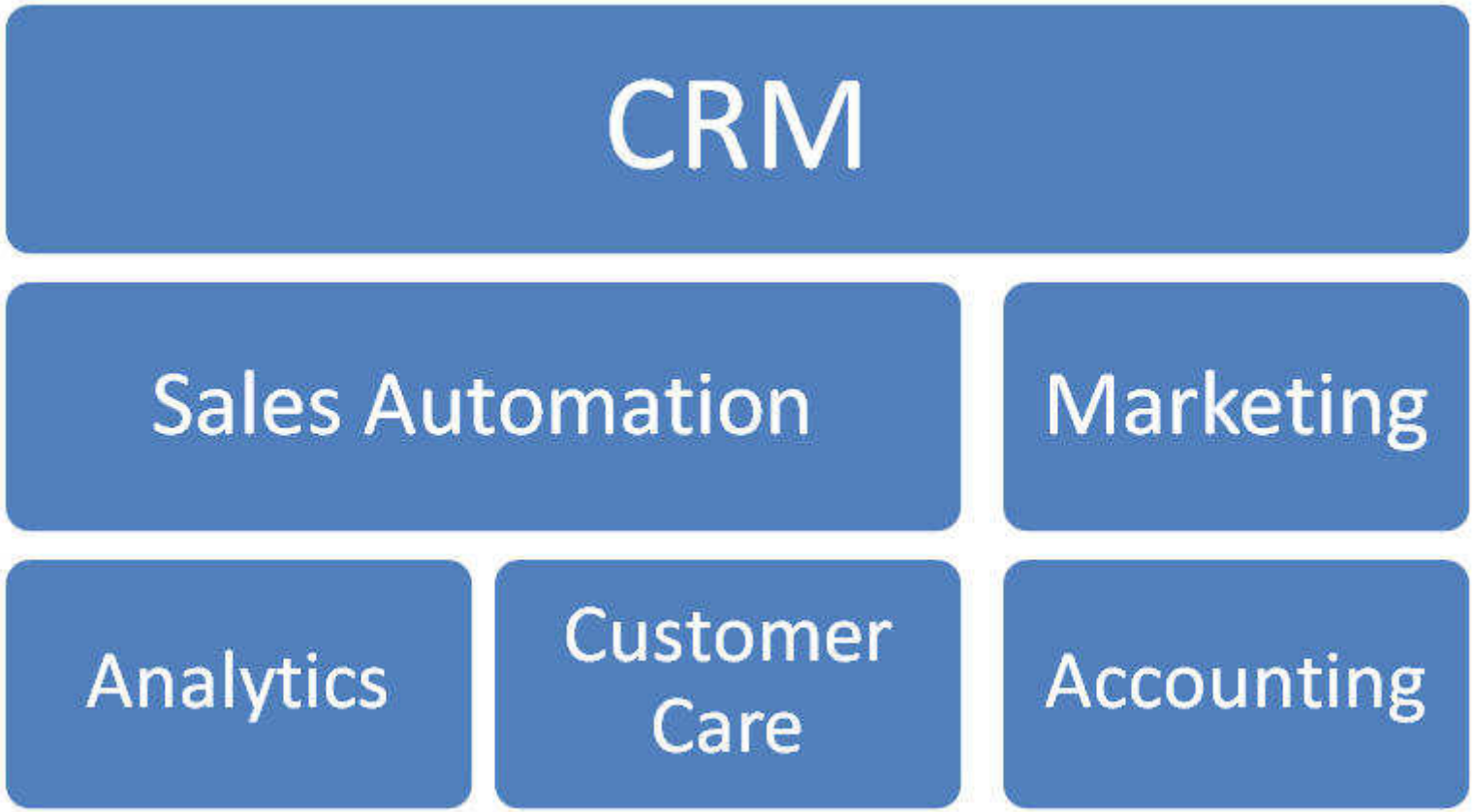
Zoho CRM
Business Benefits and Features

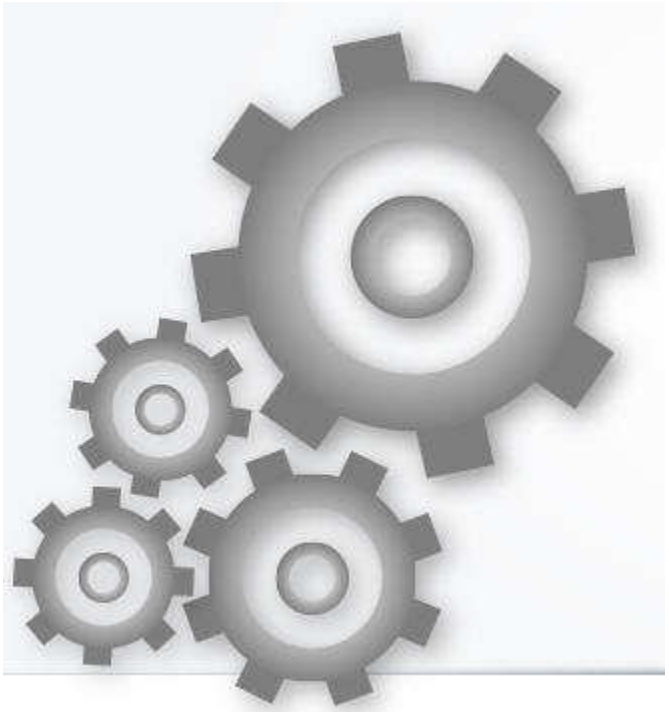
- Best value CRM available
- Flexible licensing
- No yearly licensing lock-in
- Rapid setup, use in parallel
- Free upgrades & patches
- Flexible, professional support

Key Features



Scalable

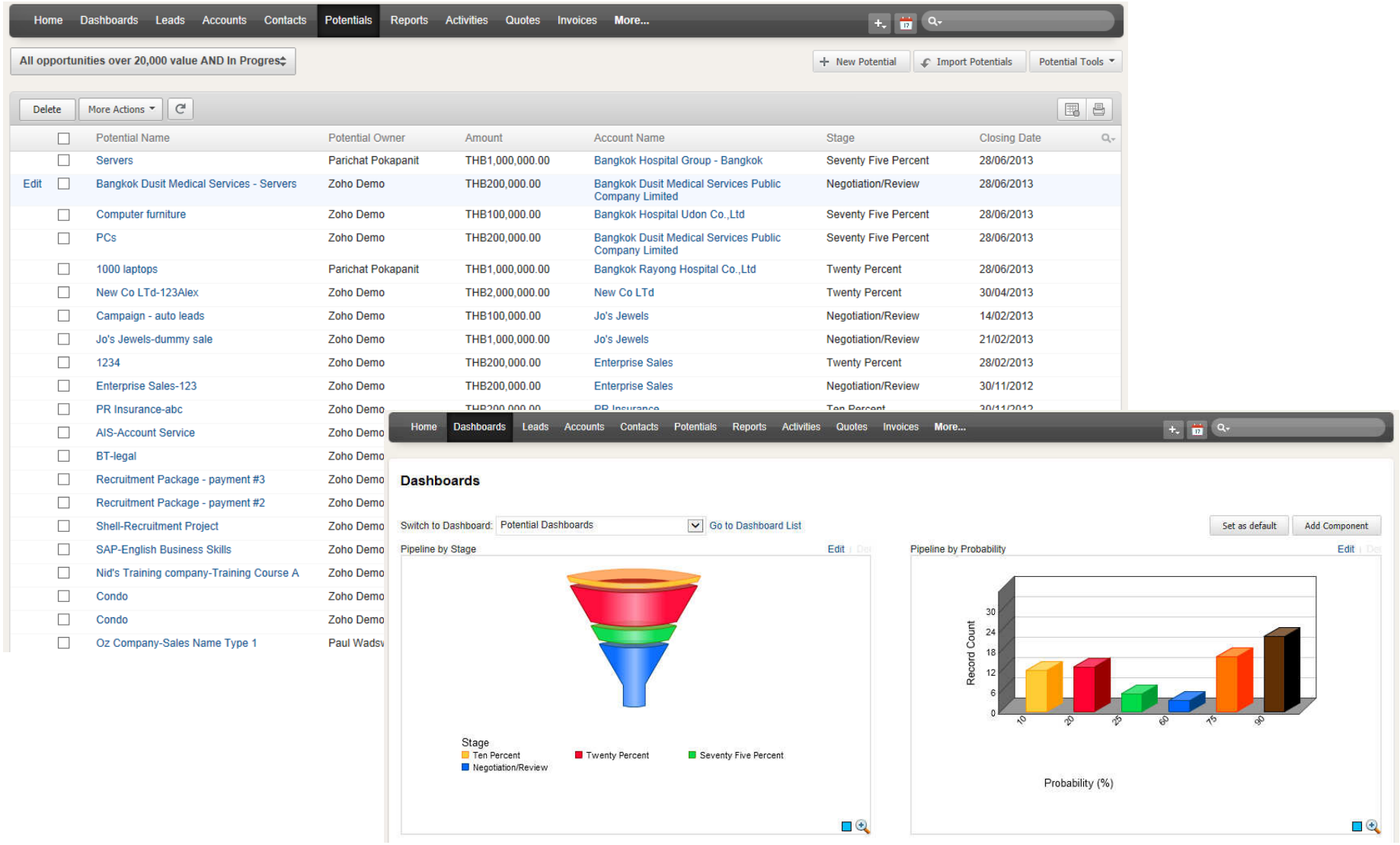
- Integration to other Zoho business apps:
  - Project management
  - Accounting & Invoicing
  - Email Marketing
  - HelpDesk Support



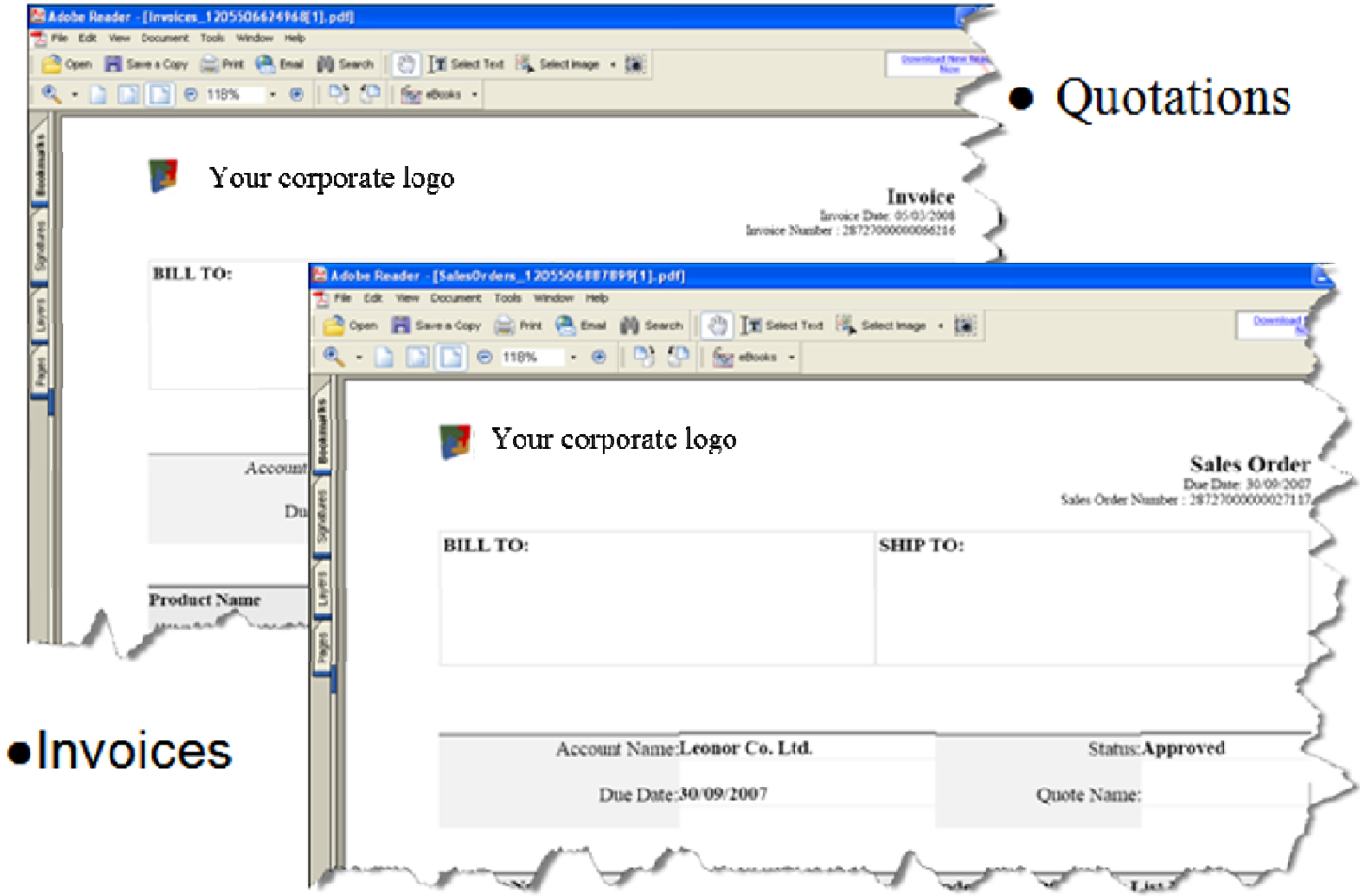
Mobile

All Contacts
Jasmine Frank
Edit
Frank Jasmine
Notes
Add Note
Add Event
Add Task
Add Potential
Delete Contact
Hopyard Rd

Insight into Sales Opportunities

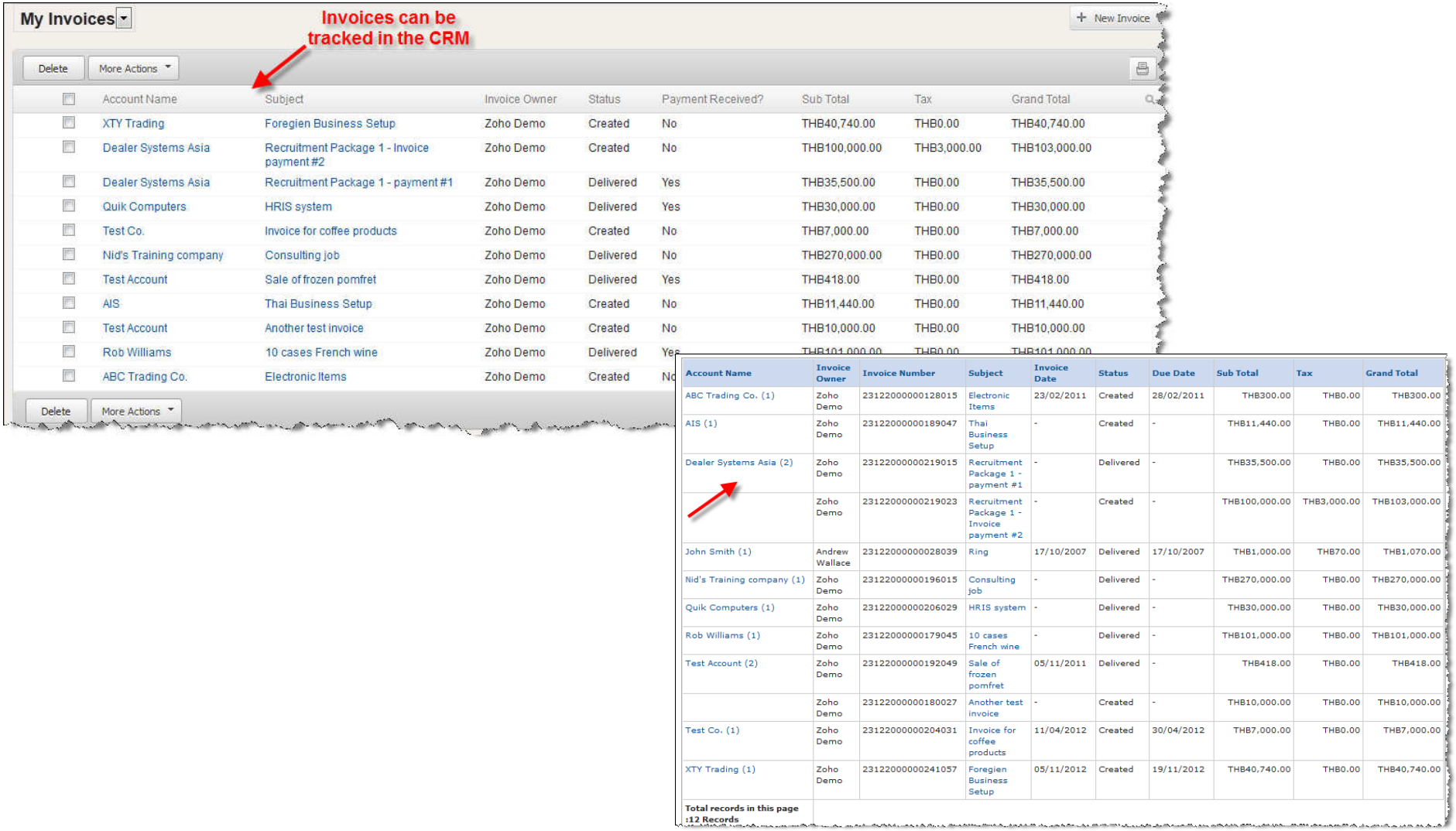


Quotes & Invoices



- Quotations
- Invoices

Invoice Status Tracking

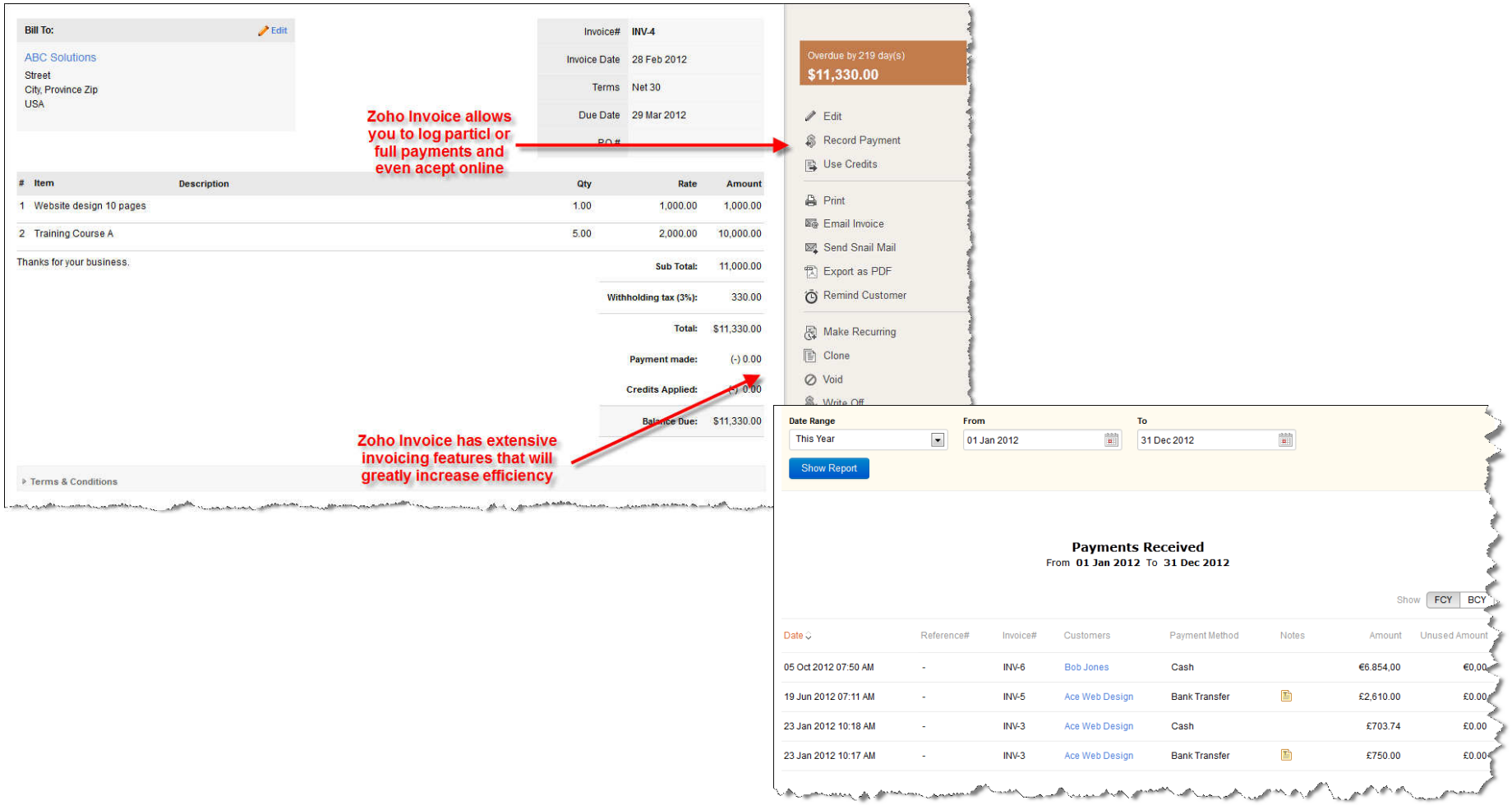


Account Name	Invoice Owner	Invoice Number	Subject	Invoice Date	Status	Due Date	Sub Total	Tax	Grand Total
ABC Trading Co. (1)	Zoho Demo	2312200000128015	Electronic Items	23/02/2011	Created	28/02/2011	THB300.00	THB0.00	THB300.00
AIS (1)	Zoho Demo	2312200000189047	Thai Business Setup	-	Created	-	THB11,440.00	THB0.00	THB11,440.00
Dealer Systems Asia (2)	Zoho Demo	2312200000219015	Recruitment Package 1 - payment #1	-	Delivered	-	THB35,500.00	THB0.00	THB35,500.00
	Zoho Demo	2312200000219023	Recruitment Package 1 - Invoice payment #2	-	Created	-	THB100,000.00	THB3,000.00	THB103,000.00
John Smith (1)	Andrew Wallace	2312200000028039	Ring	17/10/2007	Delivered	17/10/2007	THB1,000.00	THB70.00	THB1,070.00
Nid's Training company (1)	Zoho Demo	2312200000196015	Consulting job	-	Delivered	-	THB270,000.00	THB0.00	THB270,000.00
Quik Computers (1)	Zoho Demo	2312200000206029	HRIS system	-	Delivered	-	THB30,000.00	THB0.00	THB30,000.00
Rob Williams (1)	Zoho Demo	2312200000179045	10 cases French wine	-	Delivered	-	THB101,000.00	THB0.00	THB101,000.00
Test Account (2)	Zoho Demo	2312200000192049	Sale of frozen pomfret	05/11/2011	Delivered	-	THB418.00	THB0.00	THB418.00
	Zoho Demo	2312200000180027	Another test invoice	-	Created	-	THB10,000.00	THB0.00	THB10,000.00
Test Co. (1)	Zoho Demo	2312200000204031	Invoice for coffee products	11/04/2012	Created	30/04/2012	THB7,000.00	THB0.00	THB7,000.00
XTY Trading (1)	Zoho Demo	2312200000241057	Foregien Business Setup	05/11/2012	Created	19/11/2012	THB40,740.00	THB0.00	THB40,740.00

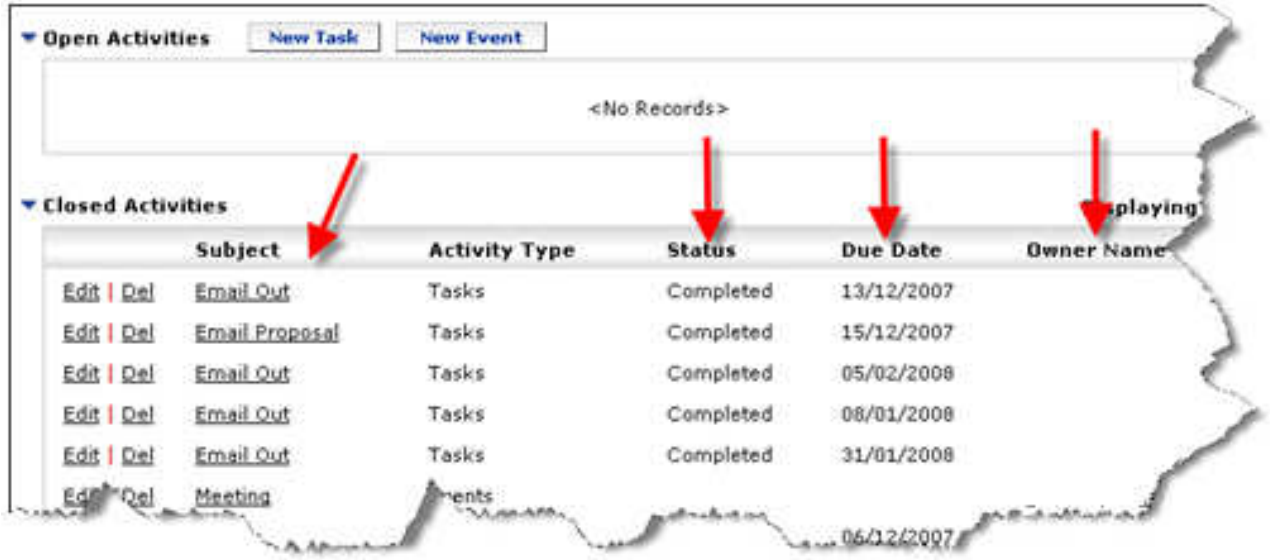
Total records in this page :12 Records

Payment Tracking

- With Zoho Invoice Integration



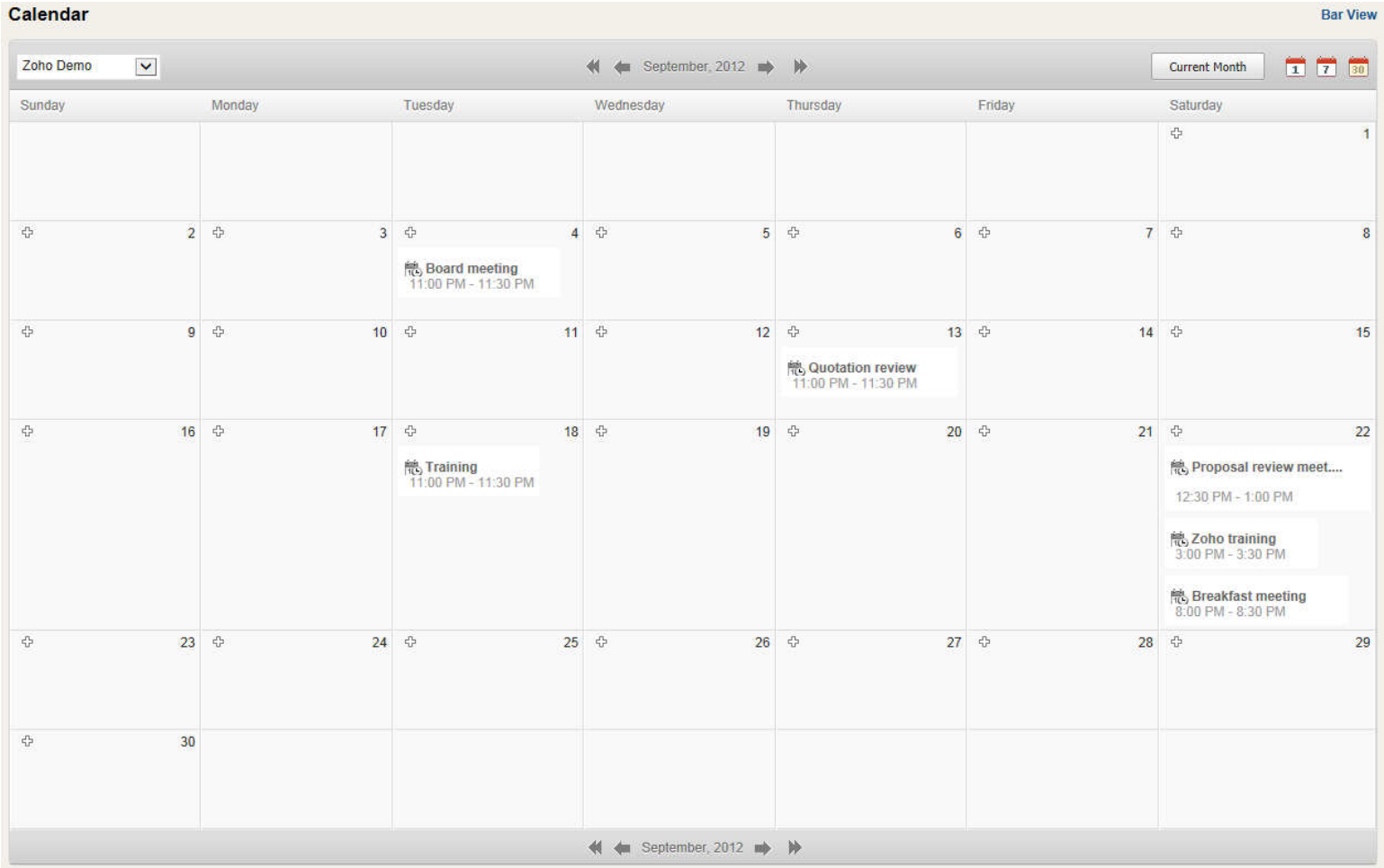
Track Sales Activities



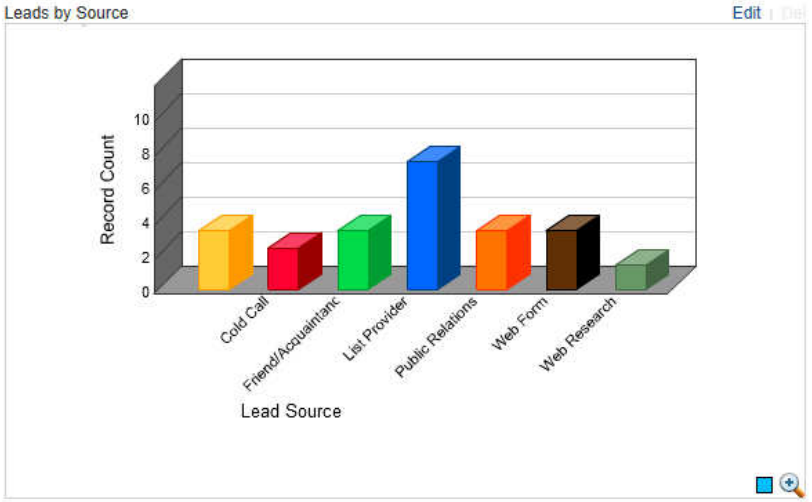
- Log meetings, tasks, calls
- Track status
- Run activity reports

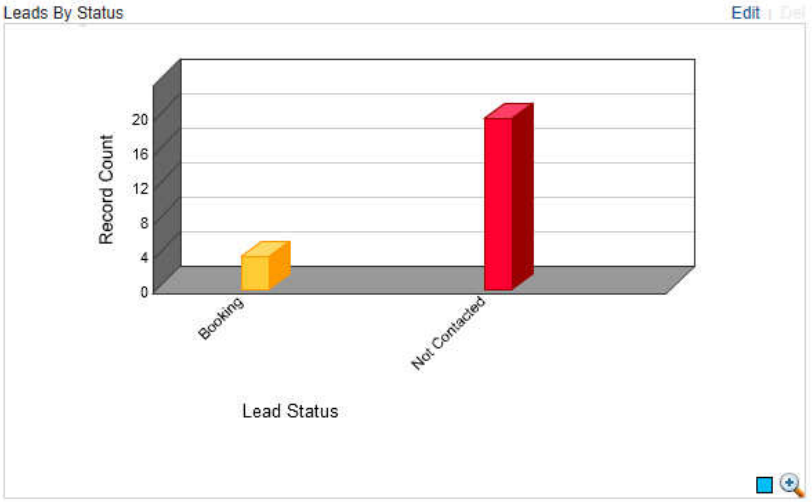
Centralised Calendar

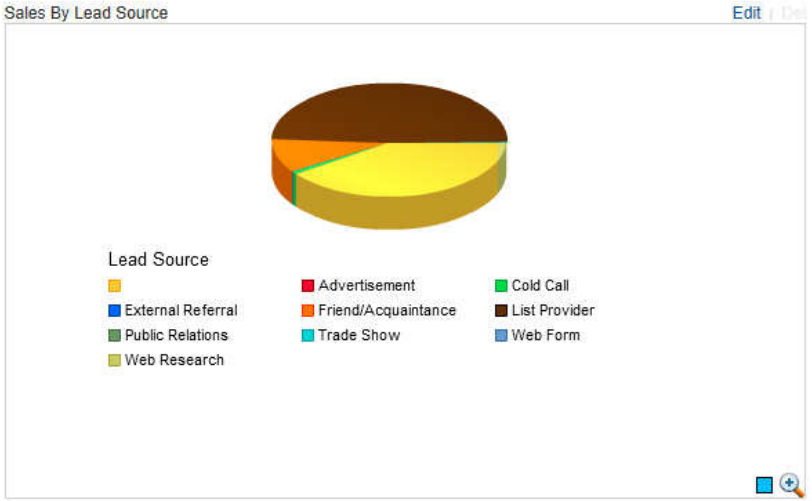
- Collaborative calendar for all users

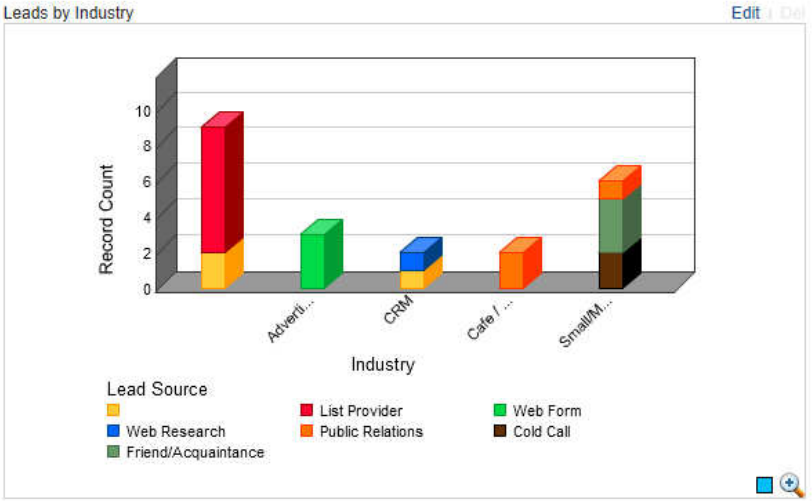


Dashboards





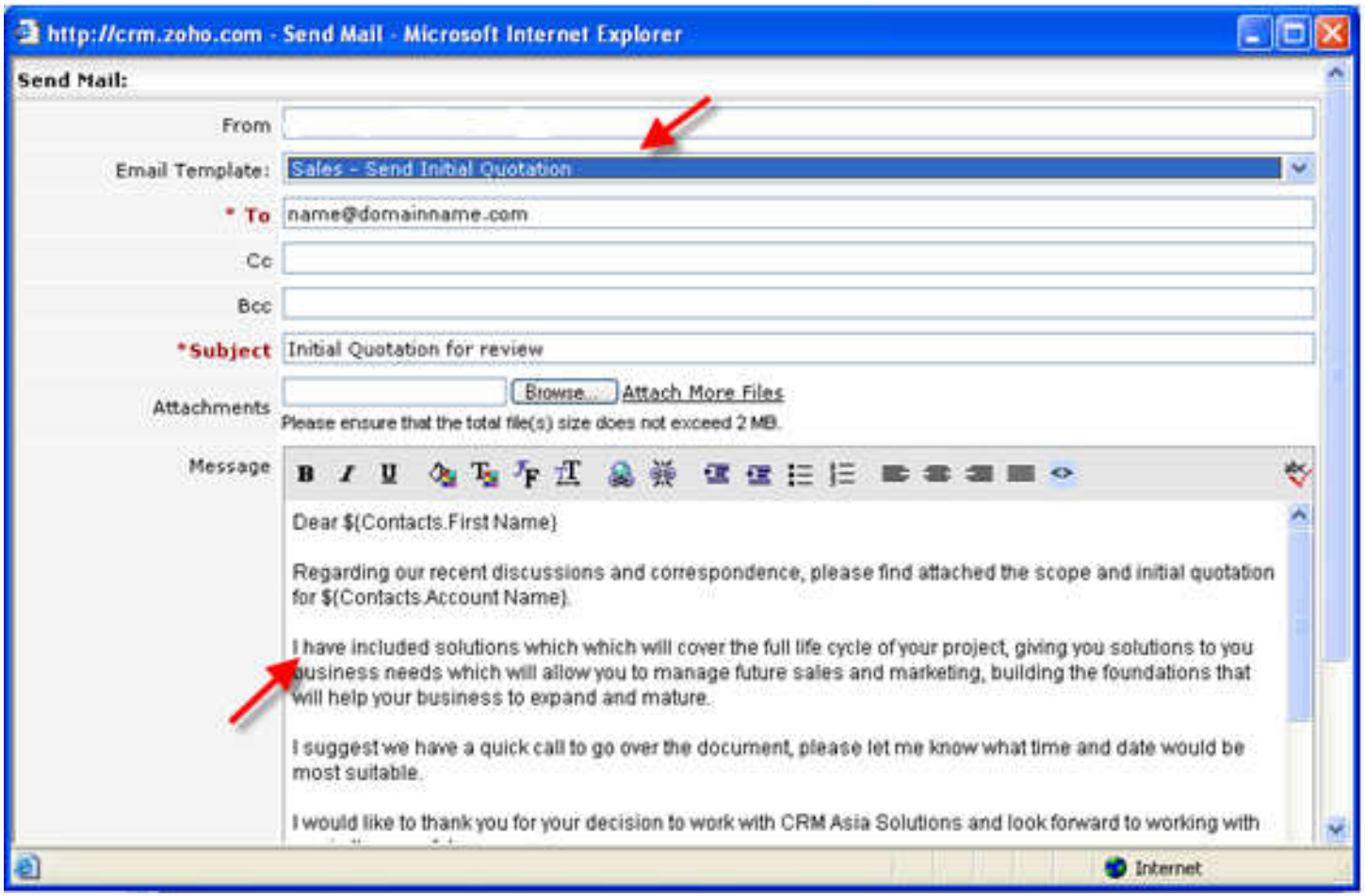




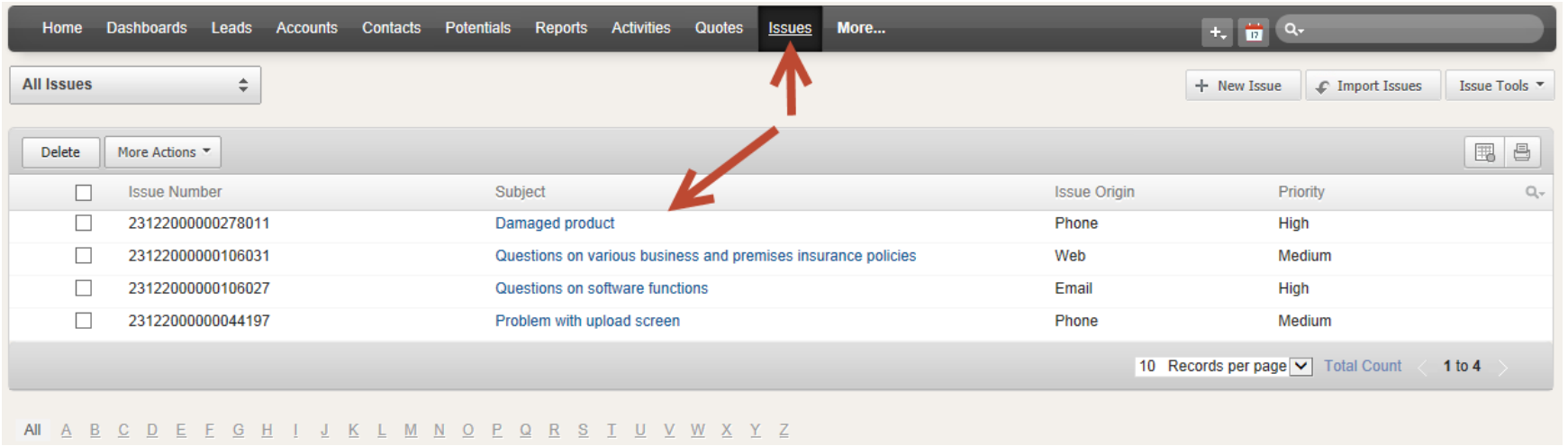
Dashboards focus your team on what is important and provide a snapshot into the business

Communications Templates

… to suit *your* business
… to improve efficiency



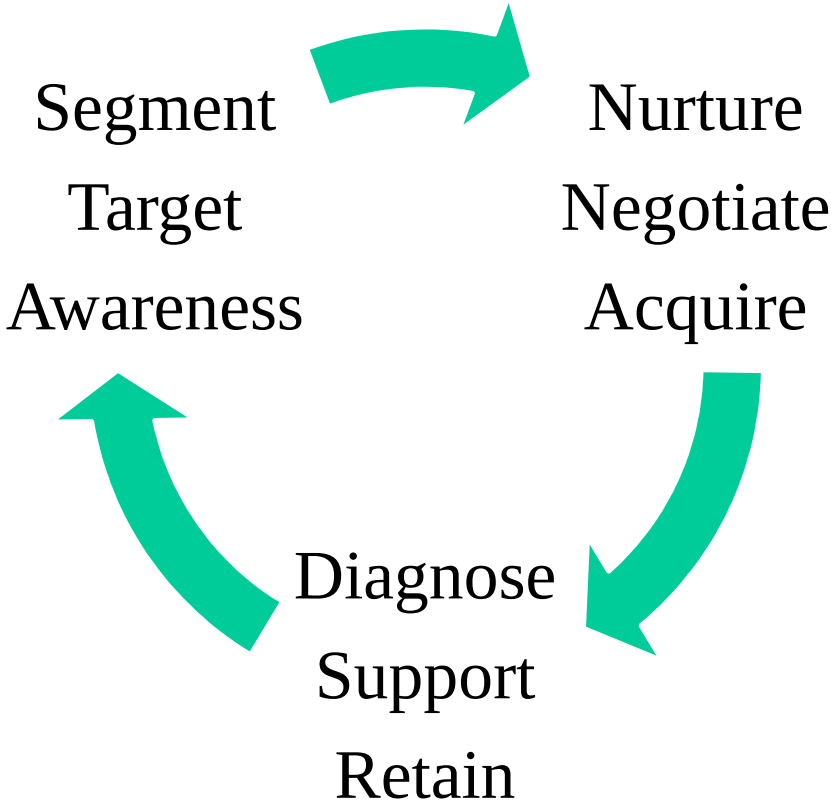
Support



- Centralise Support cases
- Build internal knowledgebase
- Reduce issue resolution time
- Also integrates to Zoho Support HelpDesk

Secure

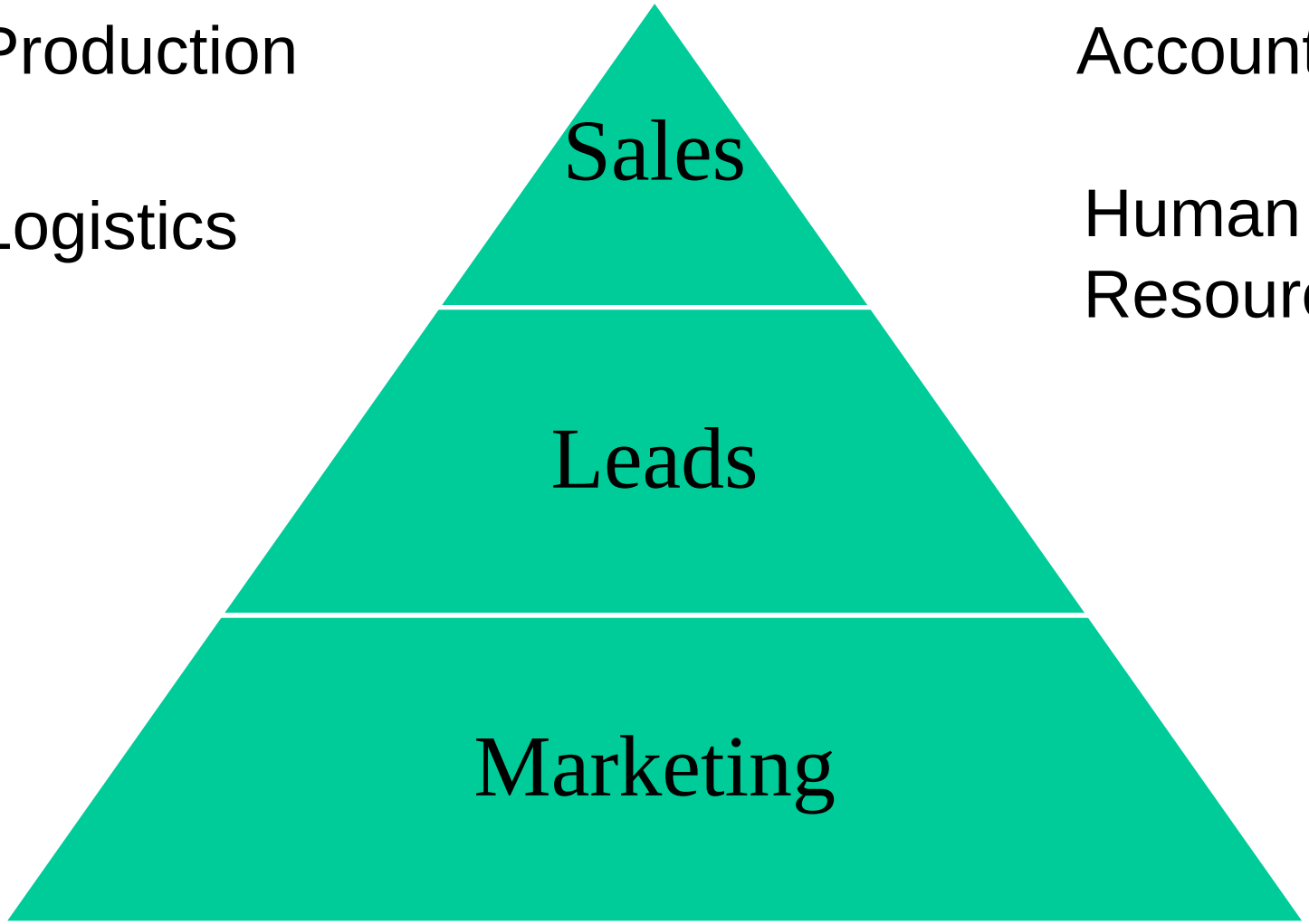
A 360 Degree View of your Business



Expand the CRM as your Business Grows

Production

Logistics

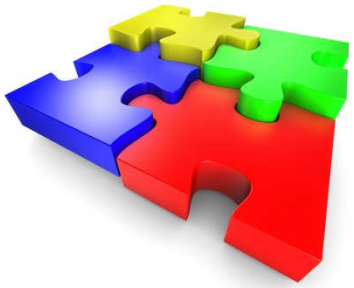


Accounts

Human Resources

Summary

- Increase working efficiency
- Visibility into the business
- Reduce manpower costs
- Increased revenue
- Centralised Sales & Marketing
- Many integrated Zoho solutions



- **Benefit your CUSTOMERS!**

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