



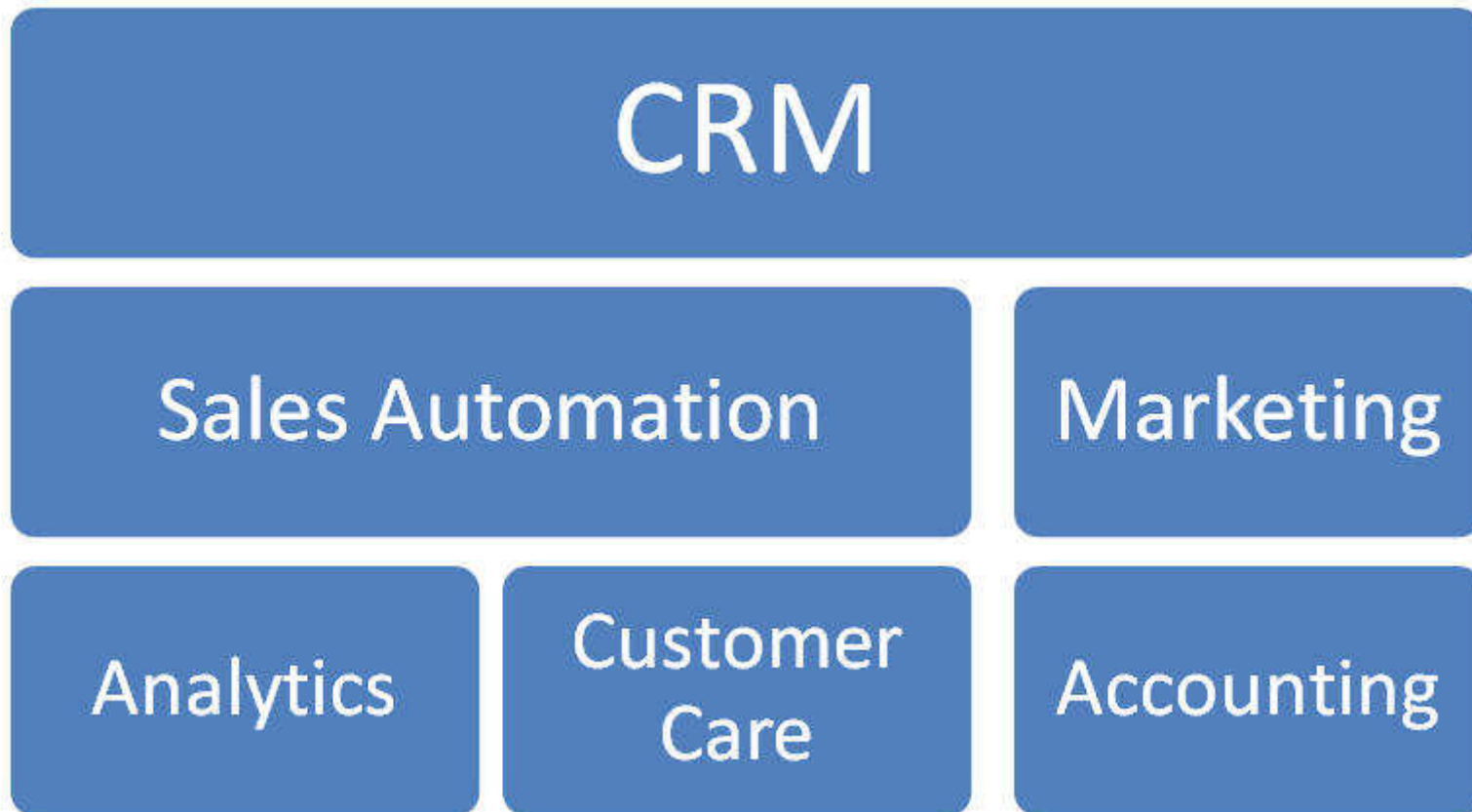
# Zoho CRM Business Benefits and Features



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



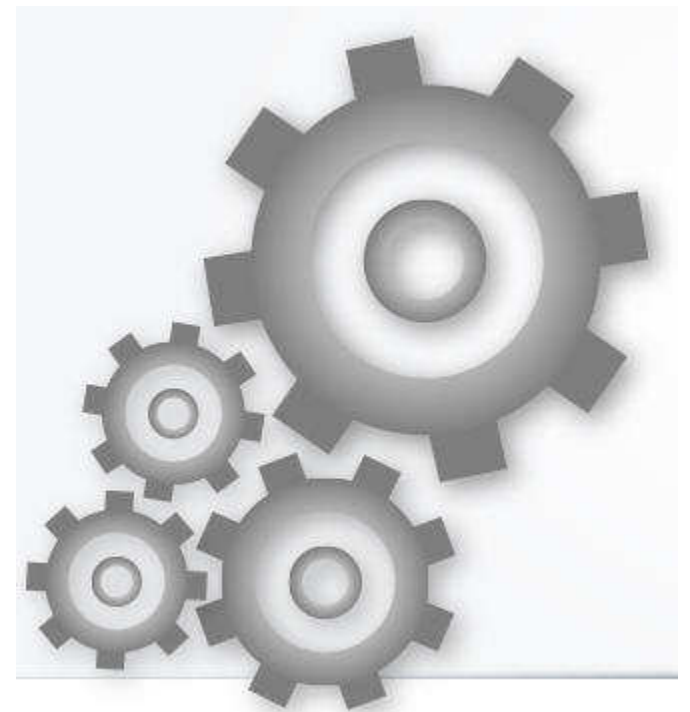
# Key Features



# Scalable



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



# Mobile



# Insight into Sales Opportunities



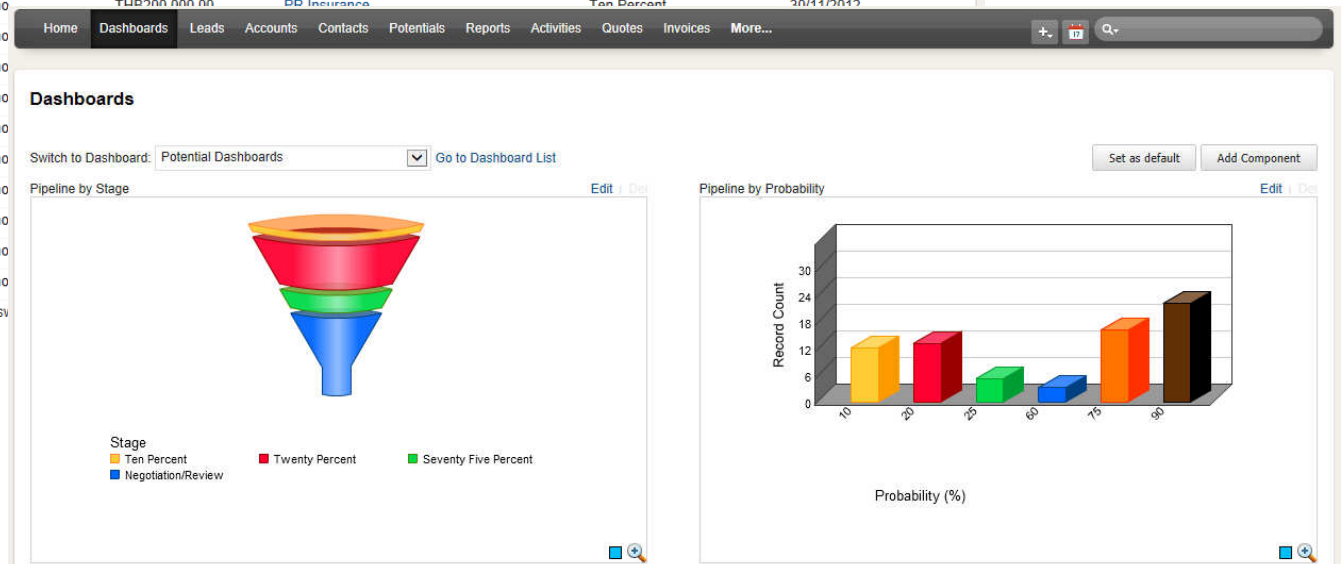
Home Dashboards Leads Accounts Contacts Potentials Reports Activities Quotes Invoices More...

All opportunities over 20,000 value AND In Progress

+ New Potential Import Potentials Potential Tools

Delete More Actions

<input type="checkbox"/>	Potential Name	Potential Owner	Amount	Account Name	Stage	Closing Date
<input type="checkbox"/>	Servers	Parichat Pokapanit	THB1,000,000.00	Bangkok Hospital Group - Bangkok	Seventy Five Percent	28/06/2013
<a href="#">Edit</a> <input type="checkbox"/>	Bangkok Dusit Medical Services - Servers	Zoho Demo	THB200,000.00	Bangkok Dusit Medical Services Public Company Limited	Negotiation/Review	28/06/2013
<input type="checkbox"/>	Computer furniture	Zoho Demo	THB100,000.00	Bangkok Hospital Udon Co.,Ltd	Seventy Five Percent	28/06/2013
<input type="checkbox"/>	PCs	Zoho Demo	THB200,000.00	Bangkok Dusit Medical Services Public Company Limited	Seventy Five Percent	28/06/2013
<input type="checkbox"/>	1000 laptops	Parichat Pokapanit	THB1,000,000.00	Bangkok Rayong Hospital Co.,Ltd	Twenty Percent	28/06/2013
<input type="checkbox"/>	New Co LTd-123Alex	Zoho Demo	THB2,000,000.00	New Co LTd	Twenty Percent	30/04/2013
<input type="checkbox"/>	Campaign - auto leads	Zoho Demo	THB100,000.00	Jo's Jewels	Negotiation/Review	14/02/2013
<input type="checkbox"/>	Jo's Jewels-dummy sale	Zoho Demo	THB1,000,000.00	Jo's Jewels	Negotiation/Review	21/02/2013
<input type="checkbox"/>	1234	Zoho Demo	THB200,000.00	Enterprise Sales	Twenty Percent	28/02/2013
<input type="checkbox"/>	Enterprise Sales-123	Zoho Demo	THB200,000.00	Enterprise Sales	Negotiation/Review	30/11/2012
<input type="checkbox"/>	PR Insurance-abc	Zoho Demo	THB200,000.00	PR Insurance	Ten Percent	30/11/2012
<input type="checkbox"/>	AIS-Account Service	Zoho Demo				
<input type="checkbox"/>	BT-legal	Zoho Demo				
<input type="checkbox"/>	Recruitment Package - payment #3	Zoho Demo				
<input type="checkbox"/>	Recruitment Package - payment #2	Zoho Demo				
<input type="checkbox"/>	Shell-Recruitment Project	Zoho Demo				
<input type="checkbox"/>	SAP-English Business Skills	Zoho Demo				
<input type="checkbox"/>	Nid's Training company-Training Course A	Zoho Demo				
<input type="checkbox"/>	Condo	Zoho Demo				
<input type="checkbox"/>	Condo	Zoho Demo				
<input type="checkbox"/>	Oz Company-Sales Name Type 1	Paul Wadsv				



# Quotes & Invoices



The image shows two overlapping windows of Adobe Reader. The top window displays an invoice template with a placeholder for a corporate logo, the word "Invoice", and fields for "Invoice Date: 05/03/2008" and "Invoice Number: 28727000000066216". The bottom window displays a sales order form with a corporate logo placeholder, "Sales Order", "Due Date: 30/09/2007", and "Sales Order Number: 28727000000027117". The form includes "BILL TO:" and "SHIP TO:" sections, and a table with the following data:

Account Name: Leonor Co. Ltd.	Status: Approved
Due Date: 30/09/2007	Quote Name:

Labels "Account" and "Product Name" are visible on the left side of the sales order form. A bullet point "• Quotations" is positioned to the right of the top window, and a bullet point "• Invoices" is positioned to the left of the bottom window.

# Invoice Status Tracking



**My Invoices** + New Invoice

**Invoices can be tracked in the CRM**

<input type="checkbox"/>	Account Name	Subject	Invoice Owner	Status	Payment Received?	Sub Total	Tax	Grand Total
<input type="checkbox"/>	XTY Trading	Foregien Business Setup	Zoho Demo	Created	No	THB40,740.00	THB0.00	THB40,740.00
<input type="checkbox"/>	Dealer Systems Asia	Recruitment Package 1 - Invoice payment #2	Zoho Demo	Created	No	THB100,000.00	THB3,000.00	THB103,000.00
<input type="checkbox"/>	Dealer Systems Asia	Recruitment Package 1 - payment #1	Zoho Demo	Delivered	Yes	THB35,500.00	THB0.00	THB35,500.00
<input type="checkbox"/>	Quik Computers	HRIS system	Zoho Demo	Delivered	Yes	THB30,000.00	THB0.00	THB30,000.00
<input type="checkbox"/>	Test Co.	Invoice for coffee products	Zoho Demo	Created	No	THB7,000.00	THB0.00	THB7,000.00
<input type="checkbox"/>	Nid's Training company	Consulting job	Zoho Demo	Delivered	No	THB270,000.00	THB0.00	THB270,000.00
<input type="checkbox"/>	Test Account	Sale of frozen pomfret	Zoho Demo	Delivered	Yes	THB418.00	THB0.00	THB418.00
<input type="checkbox"/>	AIS	Thai Business Setup	Zoho Demo	Created	No	THB11,440.00	THB0.00	THB11,440.00
<input type="checkbox"/>	Test Account	Another test invoice	Zoho Demo	Created	No	THB10,000.00	THB0.00	THB10,000.00
<input type="checkbox"/>	Rob Williams	10 cases French wine	Zoho Demo	Delivered	Yes	THB101,000.00	THB0.00	THB101,000.00
<input type="checkbox"/>	ABC Trading Co.	Electronic Items	Zoho Demo	Created	No	THB300.00	THB0.00	THB300.00

Account Name	Invoice Owner	Invoice Number	Subject	Invoice Date	Status	Due Date	Sub Total	Tax	Grand Total
ABC Trading Co. (1)	Zoho Demo	23122000000128015	Electronic Items	23/02/2011	Created	28/02/2011	THB300.00	THB0.00	THB300.00
AIS (1)	Zoho Demo	23122000000189047	Thai Business Setup	-	Created	-	THB11,440.00	THB0.00	THB11,440.00
Dealer Systems Asia (2)	Zoho Demo	23122000000219015	Recruitment Package 1 - payment #1	-	Delivered	-	THB35,500.00	THB0.00	THB35,500.00
	Zoho Demo	23122000000219023	Recruitment Package 1 - Invoice payment #2	-	Created	-	THB100,000.00	THB3,000.00	THB103,000.00
John Smith (1)	Andrew Wallace	23122000000028039	Ring	17/10/2007	Delivered	17/10/2007	THB1,000.00	THB70.00	THB1,070.00
Nid's Training company (1)	Zoho Demo	23122000000196015	Consulting job	-	Delivered	-	THB270,000.00	THB0.00	THB270,000.00
Quik Computers (1)	Zoho Demo	23122000000206029	HRIS system	-	Delivered	-	THB30,000.00	THB0.00	THB30,000.00
Rob Williams (1)	Zoho Demo	23122000000179045	10 cases French wine	-	Delivered	-	THB101,000.00	THB0.00	THB101,000.00
Test Account (2)	Zoho Demo	23122000000192049	Sale of frozen pomfret	05/11/2011	Delivered	-	THB418.00	THB0.00	THB418.00
	Zoho Demo	23122000000180027	Another test invoice	-	Created	-	THB10,000.00	THB0.00	THB10,000.00
Test Co. (1)	Zoho Demo	23122000000204031	Invoice for coffee products	11/04/2012	Created	30/04/2012	THB7,000.00	THB0.00	THB7,000.00
XTY Trading (1)	Zoho Demo	23122000000241057	Foregien Business Setup	05/11/2012	Created	19/11/2012	THB40,740.00	THB0.00	THB40,740.00
<b>Total records in this page :12 Records</b>									



# Payment Tracking



- With Zoho Invoice Integration

**Bill To:** ABC Solutions  
Street  
City, Province Zip  
USA

**Invoice#** INV-4  
**Invoice Date** 28 Feb 2012  
**Terms** Net 30  
**Due Date** 29 Mar 2012

**Overdue by 219 day(s)**  
**\$11,330.00**

**Zoho Invoice allows you to log partial or full payments and even accept online**

#	Item	Description	Qty	Rate	Amount
1	Website design	10 pages	1.00	1,000.00	1,000.00
2	Training Course A		5.00	2,000.00	10,000.00

Sub Total: 11,000.00  
Withholding tax (3%): 330.00  
Total: \$11,330.00  
Payment made: (-) 0.00  
Credits Applied: (-) 0.00  
Balance Due: \$11,330.00

**Zoho Invoice has extensive invoicing features that will greatly increase efficiency**

**Payments Received**  
From 01 Jan 2012 To 31 Dec 2012

Date	Reference#	Invoice#	Customers	Payment Method	Notes	Amount	Unused Amount
05 Oct 2012 07:50 AM	-	INV-6	Bob Jones	Cash		€6,854.00	€0.00
19 Jun 2012 07:11 AM	-	INV-5	Ace Web Design	Bank Transfer		€2,810.00	€0.00
23 Jan 2012 10:18 AM	-	INV-3	Ace Web Design	Cash		€703.74	€0.00
23 Jan 2012 10:17 AM	-	INV-3	Ace Web Design	Bank Transfer		€750.00	€0.00

# Track Sales Activities



▼ Open Activities

<No Records>

▼ Closed Activities

	Subject	Activity Type	Status	Due Date	Owner Name
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Email Out</a>	Tasks	Completed	13/12/2007	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Email Proposal</a>	Tasks	Completed	15/12/2007	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Email Out</a>	Tasks	Completed	05/02/2008	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Email Out</a>	Tasks	Completed	08/01/2008	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Email Out</a>	Tasks	Completed	31/01/2008	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Meeting</a>	Events		06/12/2007	

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

# Centralised Calendar



- Collaborative calendar for all users

Calendar Bar View

Zoho Demo September, 2012 Current Month

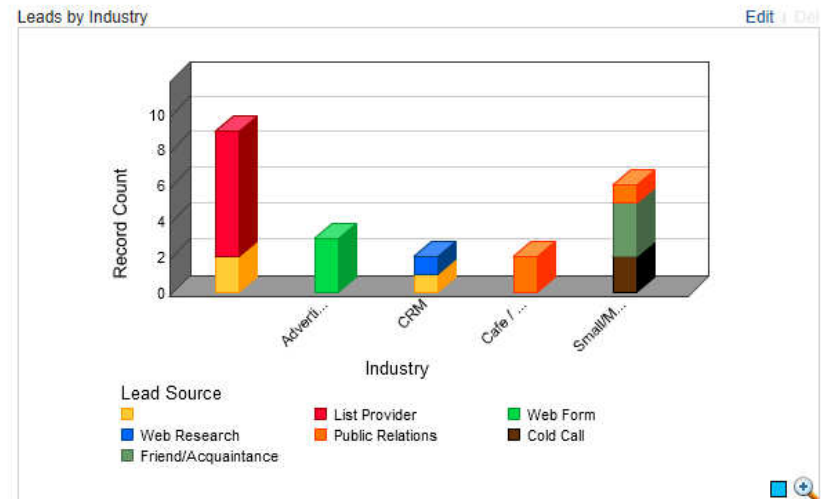
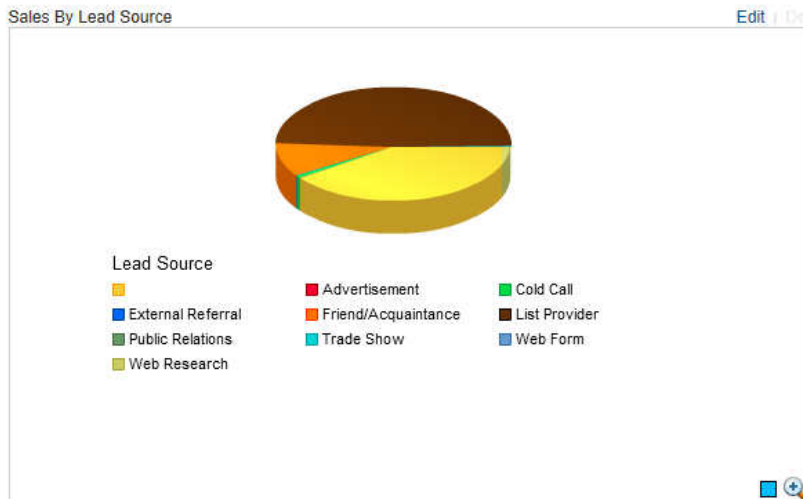
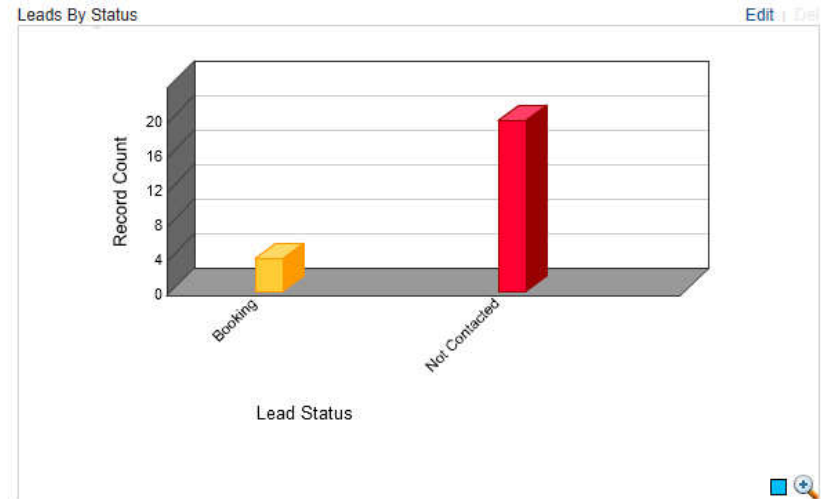
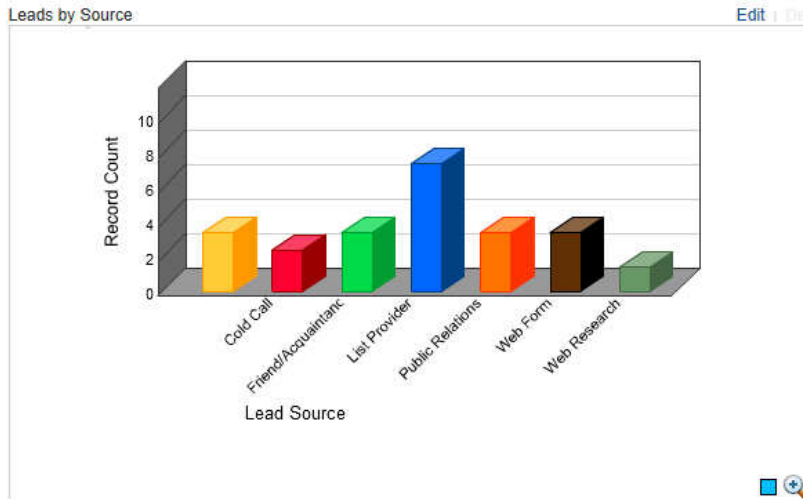
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
						1
2	3	Board meeting 11:00 PM - 11:30 PM	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

September, 2012

Calendar events:

- Board meeting: 11:00 PM - 11:30 PM (Tuesday, Sept 3)
- Quotation review: 11:00 PM - 11:30 PM (Thursday, Sept 12)
- Training: 11:00 PM - 11:30 PM (Tuesday, Sept 17)
- Proposal review meet...: 12:30 PM - 1:00 PM (Saturday, Sept 21)
- Zoho training: 3:00 PM - 3:30 PM (Saturday, Sept 21)
- Breakfast meeting: 8:00 PM - 8:30 PM (Saturday, Sept 21)

# Dashboards

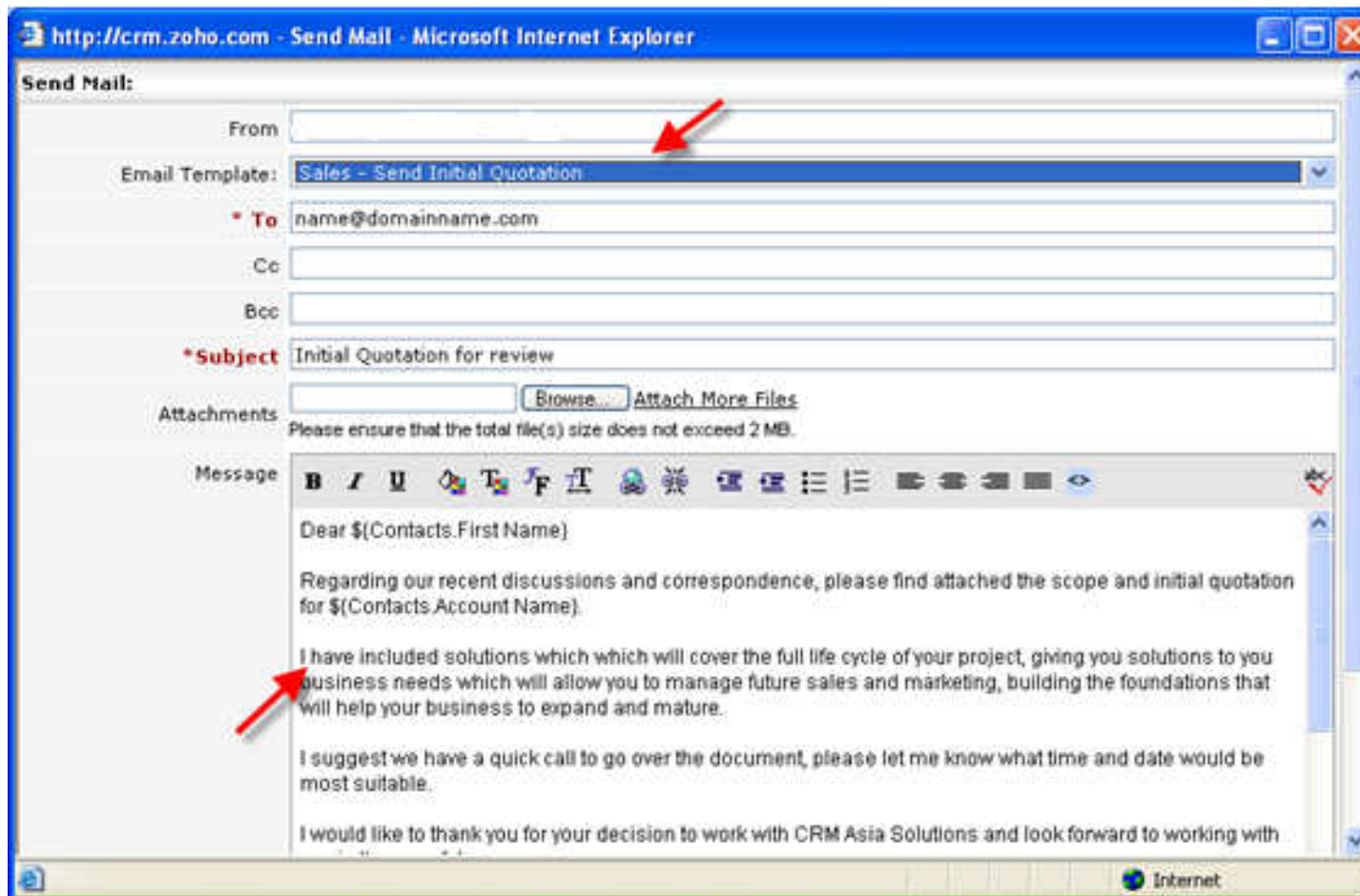


**Dashboards focus your team on what is important and provide a snapshot into the business**

# Communications Templates



... to suit *your* business  
... to improve efficiency



# Support



The screenshot shows the Mangaha web application interface. At the top, a navigation bar includes links for Home, Dashboards, Leads, Accounts, Contacts, Potentials, Reports, Activities, Quotes, **Issues**, and More... The 'Issues' tab is highlighted. Below the navigation bar, there is a search bar and a dropdown menu set to 'All Issues'. To the right of the dropdown are buttons for '+ New Issue', 'Import Issues', and 'Issue Tools'. Below this is a table with columns for Issue Number, Subject, Issue Origin, and Priority. The table contains four rows of data. At the bottom of the table, there is a pagination control showing '10 Records per page' and 'Total Count < 1 to 4 >'. Below the table is a navigation bar with letters A through Z and 'All'.

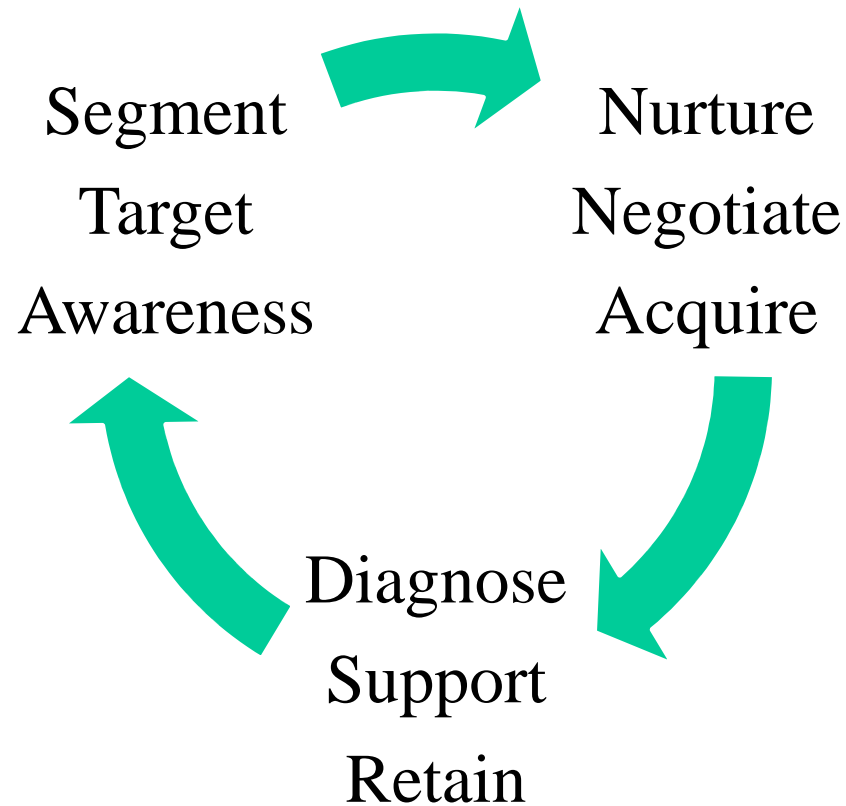
<input type="checkbox"/>	Issue Number	Subject	Issue Origin	Priority
<input type="checkbox"/>	23122000000278011	Damaged product	Phone	High
<input type="checkbox"/>	23122000000106031	Questions on various business and premises insurance policies	Web	Medium
<input type="checkbox"/>	23122000000106027	Questions on software functions	Email	High
<input type="checkbox"/>	23122000000044197	Problem with upload screen	Phone	Medium

- 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

Accounts

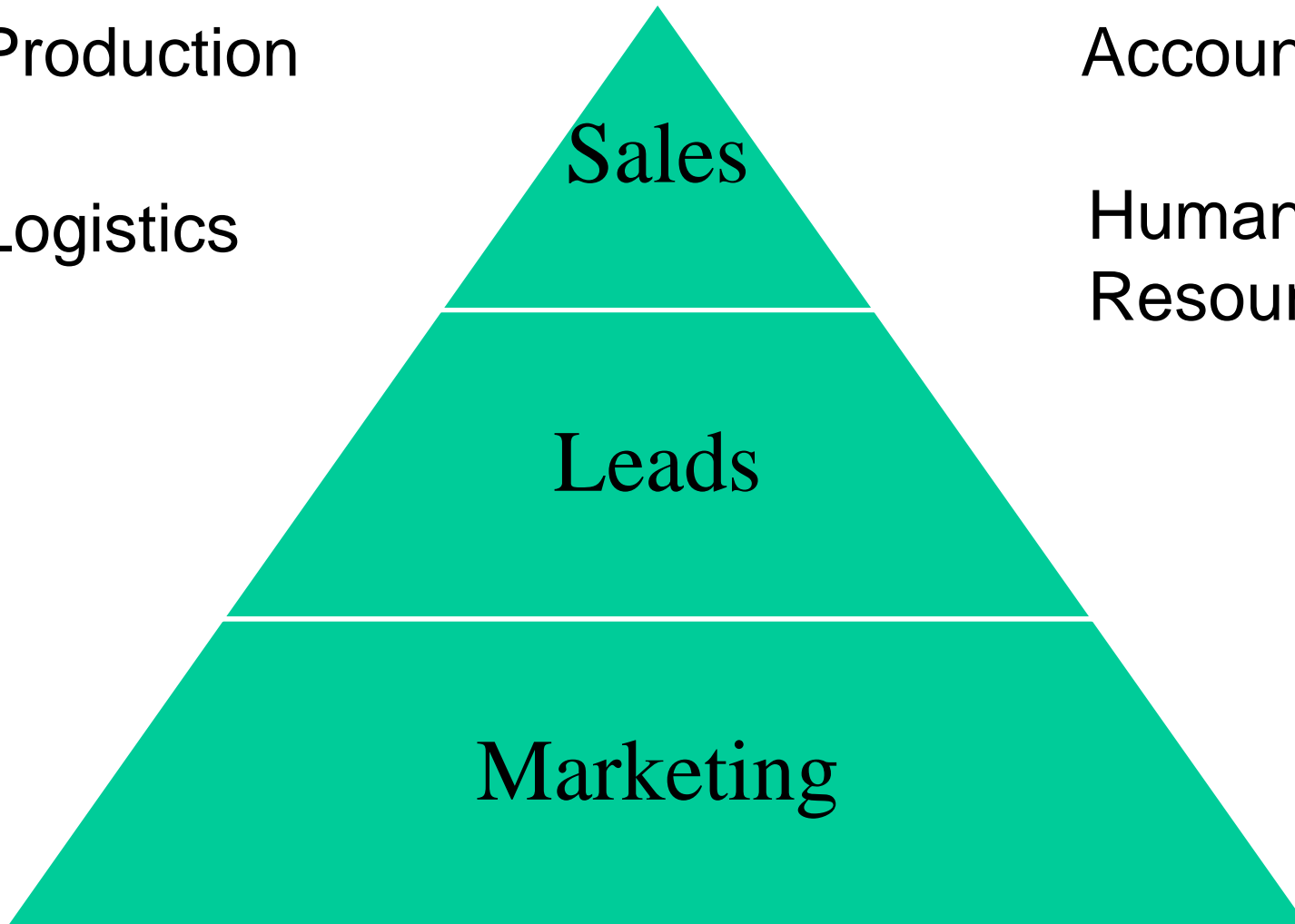
Logistics

Human  
Resources

Sales

Leads

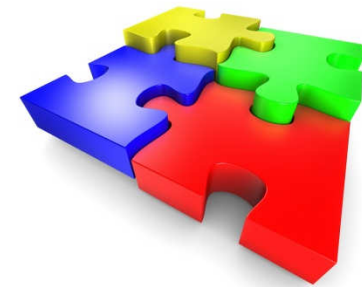
Marketing



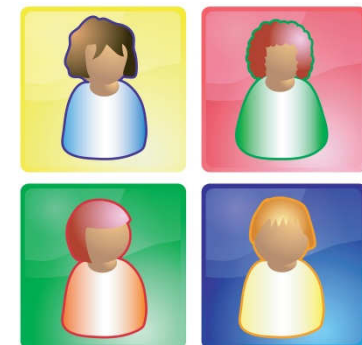
# Summary



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



- **Benefit your CUSTOMERS!**



# Connect With Us



- W: [www.mangoho.com](http://www.mangoho.com)
- E: [info@mangoho.com](mailto:info@mangoho.com)
- T: <http://www.twitter.com/mangohocloud>
- Y: <http://www.youtube.com/mangohocloud>
- Newsletter – Scan & Subscribe!

