



# Zoho CRM

## Getting Started

Guidelines for Beginners





## Getting Started on Zoho CRM

Welcome to **Zoho CRM**, an On-demand Customer Relationship Management (CRM) software for managing your customer relations in a better way.

**Zoho CRM** software helps streamline your organization-wide sales, marketing, customer support, and inventory management functions in a single system.

This guide is a simple overview, designed to help you get started. CRM software is extensive, so we will not try to cover it all in this document! We have an extensive online Zoho CRM User Guide for this purpose, which you can refer to at any time should you wish to utilize a support package.

### Topics in this Getting Started Guide

- [Definition, Target Audience and CRM Modules](#)
- [Glossary of Icons and Functions](#)
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- [Accounts](#)
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- [Reporting](#)
- [Tips and Hints for Sales](#)
- [Useful Links](#)









## Definition

CRM – Customer Relationship Management

## 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

## Zoho CRM Modules








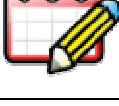


	<b>Sales Force Automation</b> Lead Management   Account Management   Contact Management Opportunity Management   Sales Forecasts   Sales Quotes
	<b>Marketing Automation</b> Campaign Management   Lead Generation   Email Marketing
	<b>Customer Support &amp; Service</b> Case Management   Solution Management
	<b>Inventory Management</b> Products Catalog   Vendor Management   Vendor Management (Procurement) Purchase Order   Sales Orders   Invoice Management
	<b>CRM Analytics</b> Reports   Dashboards
	<b>Add-Ons</b> Web-Forms   Outlook Plug-in   Office Plug-in



## Glossary Terms & Functions

Icon	Function	Comments
	<b>Activity</b>	Any activity that is assigned to an application user.
	<b>Task</b>	Scheduling of a task within a specific time frame.
	<b>Lead</b>	Brief information on the potential contact, company or business opportunity.
	<b>Account</b>	A company or a department within the company with which you plan or have business dealing.
	<b>Contact</b>	People or organization you communicate with in pursuit of a business opportunity.
	<b>Potential</b>	Refers to the important records that generate real revenue for your organization. (AKA "Opportunity")
	<b>Forecast</b>	Provides factual insight for tracking and fine-tuning the sales process in your organization.
	<b>Campaign</b>	A marketing process which is planned, executed, distributed and analyzed.
	<b>Case</b>	Refers to the feedbacks received from the customers on various issues pertaining to the use of products or services.
	<b>Solution</b>	Refers to resources within the organization that enables solving repetitive problems encountered by customers.



	<b>Product</b>	Refers to goods or services sold or procured by any organization.
	<b>Price Book</b>	The agreed price for selling a product to a customer. Based on the agreed terms, the prices can even vary for different customers.
	<b>Vendor</b>	This refers to companies, individuals or contractors from whom your organization procures products and/or services.
	<b>Quote</b>	A legal agreement between a customer and a vendor to deliver the requested product within the specified time at the agreed price.
	<b>Purchase Order</b>	This refers to a legally bound order-placing document for procuring products or services from vendors.
	<b>Sales Order</b>	Confirmation of sales generated after the customer sends a purchase order based on your quotes.
	<b>Invoice</b>	Refers to a bill issued by the vendor to the customers along with the goods/services with the purpose of procuring payments.
	<b>Calendar</b>	Allows to track / record daily activities pertaining to different modules within business operations.
	<b>Report</b>	Presentation of data or records for various modules as per requirement.
	<b>Dashboard</b>	Refers to pictorial representation of your custom report data, which gives a real-time snapshot of your organization's key metrics.



## Logging In

When your user account is first activated you will receive an email as shown below.

Login <http://crm.zoho.com>

Enter your **email address** and **password** to login.

## Navigating the Home Page

When you login you will see you CRM home page.

This gives you a snapshot in to your key items for the day/week (customizable).

If Mangoho have done a free Zoho CRM setup for you then your business logo and business name will already be visible on the Home page.

Click the interactive tabs and hyperlinks see individual records – for example:

- Click the subject of a meeting to see the meeting details
- Click the contact name to see the contact details
- Click the prospect name to see the sale

This is known as an object oriented database, all objects are linked to something.

Let's use an imaginary company who have just created their CRM.

On the following page you can see their Home Page.

This is the screen the users will see when they first login to the system.

### **TIP:**

Customise the Home Page to match your business needs and the needs of your staff, to make your business more efficient.

The Home Page, as with most other screens in Zoho CRM, can be customized to match your needs, for example:

If you want staff to be task oriented, we would suggest moving the 'Upcoming Tasks' and Tasks for Next 7 Days' blocks to the top of the screen.

If you want staff to be focused on the sales in hand, then you may wish to move the 'Open Sales Opportunities' or 'Sales Closing This Month' blocks to the top and Tasks below.

And so on... There are endless possibilities.



CRM ASIA Solutions Upgrade Try Other Editions Setup Help zohodemoadmin

Home Dashboards Leads Accounts Contacts Reports Campaigns Sales Orders Activities Quotes More...

Welcome Zoho Demo at Your Company Name

### Next Weeks Tasks Plus Late

Subject	Due Date	Status	Priority	Activity Type
Create Contract	22/11/2012	Not Started	High	Tasks
Onsite visit	08/10/2012	Not Started	High	Tasks
Review status	24/09/2012	Not Started	High	Tasks
Review website page for Zoho Apps	22/09/2012	Not Started	Low	Tasks
Send brochure	04/05/2012	Not Started	High	Tasks

### Leads by Source

Leads by Source

### Closing This Month

Potential Name	Amount	Stage	Closing Date	Account Name
Sams Weddings-cake	THB0.00	Ten Percent	31/12/2012	Sams Weddings
Recruitment Package - payment #3	THB30,000.00	Negotiation/Review	30/12/2012	Dealer Systems Asia

### Student Grades

Contact Name	Account Name	Reading Level	Writing Level	Listening Level	Speaking Level
Nidy Jones	Nid's Training company	3	3	2	
Sapan Taksin	Mrs. Taksin	2	1	1	1
Bob Johansenn	Mr. Johansenn	3	4	3	5

Change the layout of your home screen by dragging elements to a new position.

## Tabs

Use the tabs to access the different elements of the CRM.

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Home Dashboards Leads Accounts **Contacts** Reports Campaigns Sales Orders Activities Quotes More...

Welcome Zoho Demo at Your Company Name

### Leads

Sales leads, unqualified, which have been entered into the CRM to convert into sales.

### Accounts

Prospects (qualified leads), Partners, Competitors, Customers – any company you are involved with.

### Contacts

People belonging to the account

### Potentials

Potential sales – these will have several stages (customizable), from prospecting to closed won or lost. There will be many sales activities, notes, documents etc belonging to the potentials. See "Tips and Hints for Sales", below.



## Campaigns

These refer to your business marketing campaigns. These can be online (pay per click search engine marketing or email marketing) or offline (adverts, radio commercials, magazine adverts etc). Leads and potentials can be assigned to these campaigns to assess your marketing ROI.

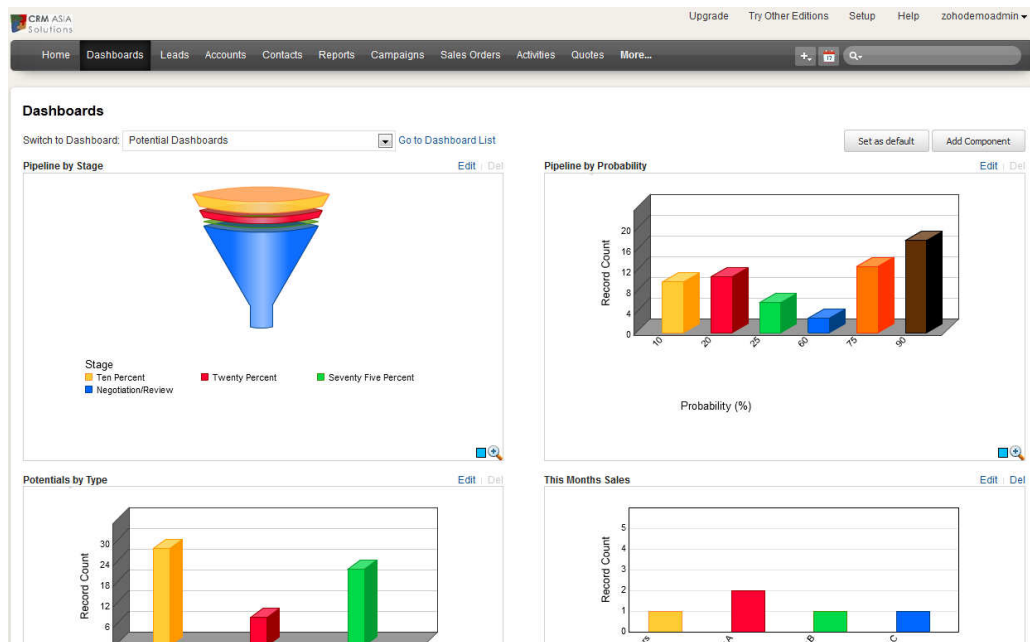
## Reports

Your reports – many types of reports are included and many more can be tailor made according to your business requirements

## Dashboards

These give you a snapshot into the status of leads, potentials, sales activities, etc.

Change the type of dashboard you want to see using the drop down, see next page.

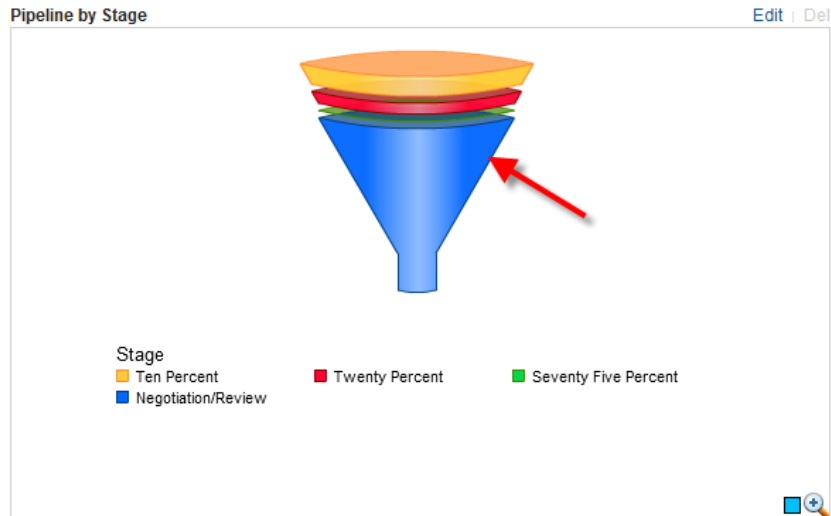


Like other elements, the dashboard graphics are interactive, click the relevant area to display the information.





For example, you want to filter all potentials in the Negotiation stage, click the blue Negotiation section:

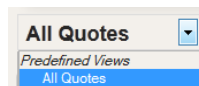


The information is displayed in report format:

→ Negotiation/Review (17)	Enterprise Sales	-	Enterprise Sales-123	30/11/2012	90	THB180,000.00	-	THB200,000.00
	BT	-	BT-legal	31/07/2012	90	THB63,000.00	-	THB70,000.00
	Leonor Design	-	Necklace	31/05/2010	90	THB0.00	-	THB0.00
	Mr. Johanssenn	0281111111	J1 Boys Class - Oct - Dec 08	29/09/2008	90	-	-	THB50,000.00
	Toy Factory	998098098	Bulk toy order Q1	30/04/2008	90	-	neg price	THB20,000.00
	Exotic Furniture	02 566 8478	Business English Course	27/06/2008	90	-	-	THB300,000.00
					Avg 90	THB243,000.00		THB640,000.00
	Advertisement (1)	Internet Cafe	-	CRM Implementation	31/01/2008	90	-	Send Proposal
					Avg 90	-		THB3,000.00
	External Referral (2)	ABC Travel Agents	44 76862094	Angkor tour package	01/11/2007	90	-	THB5,000.00
	SAP	-	SAP-English	28/02/2012	90	THB90,000.00	-	THB100,000.00

## Quotations

Shows you quotations, you can filter by the 'View':



Views are filters, customizable according to your business requirements. Mangoho can create any number of filters you need should you wish to proceed with an implementation project.



## Activities

Know what your team is doing each day. Use the various filter criteria to drill down, click an event to see details.

Subject	Contact Name	Call Type	Call Start Time	Call Duration	Activity Type
Called to discuss proposal	Sally Fields	Outbound	05/09/2012 01:23 PM	10:00	Calls
Call to review quoted package	Peter Johns	Outbound	02/05/2012 08:53 PM	10:00	Calls
demo	Jim Smith	Outbound	28/04/2012 02:33 PM	00:17	Calls
prospecting about product x,y,z	Sally Fields	Outbound	26/03/2012 09:31 PM	00:59	Calls
Enquiry about products	Sally Fields	Inbound	26/03/2012 09:29 PM	00:08	Calls
general enquiry	Sally Fields	Inbound	26/03/2012 09:26 PM	05:00	Calls
sales pitch	Sam Smith	Outbound	10/02/2012 06:13 AM	00:30	Calls
Called to close the training deal	Tommy Smith	Outbound	06/02/2012 01:17 PM	00:27	Calls
make call to confirm meeting	Jon Smith	Outbound	02/02/2012 06:12 AM	00:21	Calls
Called to discuss condo requirements	Jon Smith	Outbound	08/11/2011 12:23 PM	00:29	Calls

## Cases

Customer support requests, questions, internal problems. Staff can log and track all company issues, internal and external.

You can change the name of this and all other tabs to match your business needs, as you can see in this example we have renamed 'Cases' to 'Incident Tracking':

Incident Tracking Number	Subject	Incident Tracking Origin	Priority
23122000000106031	Questions on various business and premises insurance policies	Web	Medium
23122000000106027	Questions on various business and premises insurance policies	Email	High
23122000000044197	Questions on various business and premises insurance policies	Phone	Medium

### TIP:

Need a more robust customer HelpDesk solution? Why not integrate Zoho Support with Zoho CRM?

Zoho Support is a powerful online HelpDesk solution that allows you to automate and improve your customer support process with ticket tracking, customer knowledgebase articles and video, chat forums, livechat, support time and contract tracking and more.



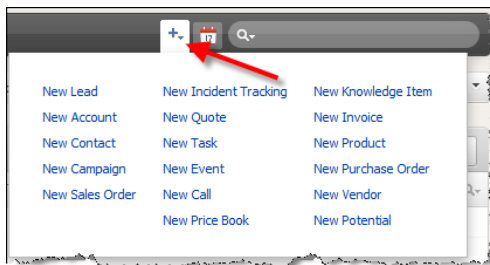
The “**More...**” tab shows additional CRM modules available, from solutions (knowledgebase) to product books, invoicing etc.

Similar concepts apply and these are all customizable to suit your business.

These will be dealt with in more detail should you wish to proceed with a CRM implementation and support project.

### **How do I Add New Information Quickly?**

Use the Quick Create function in the top right of the screen, then select what you would like to create:



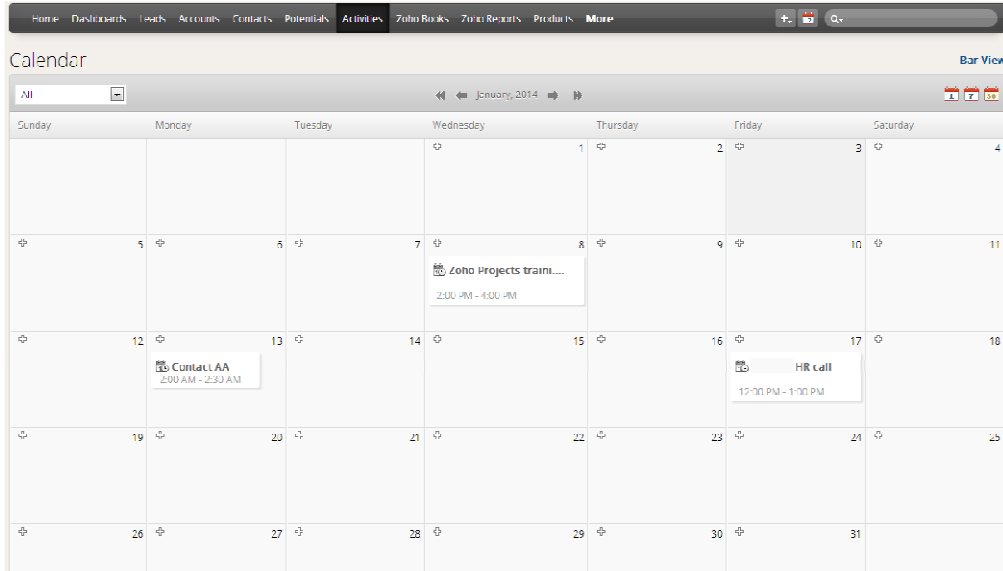
### **Calendar**

Use the Calendar icon in the top right of the screen to see your team calendar, select daily, weekly or monthly view.



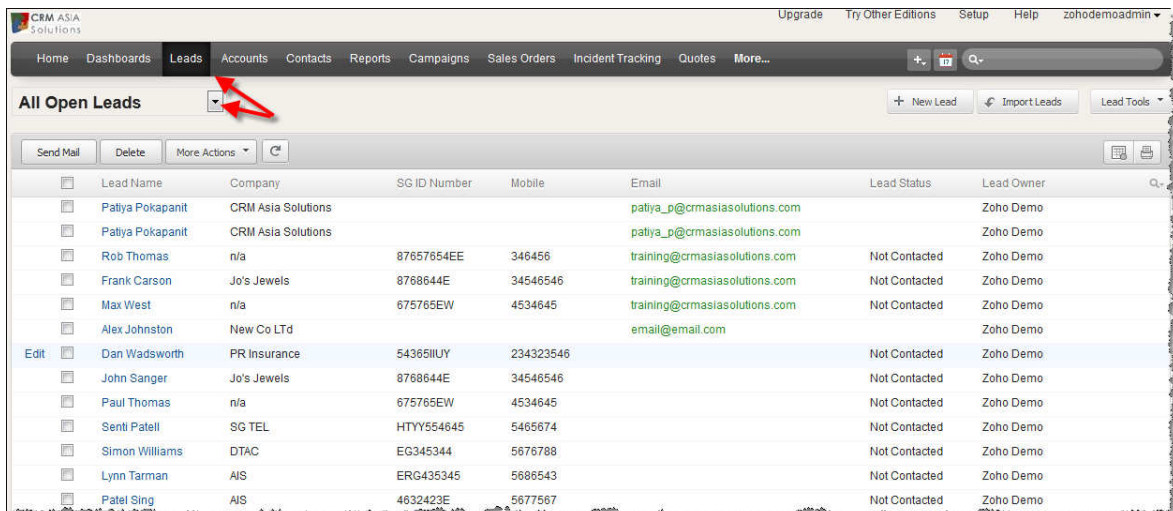


This will display a collaborative calendar for you and all of your team in monthly, weekly or daily format, and yes, this feature does synch with Google Calendar and also now Zoho Calendar, the free online calendaring solution from Zoho:



## Leads

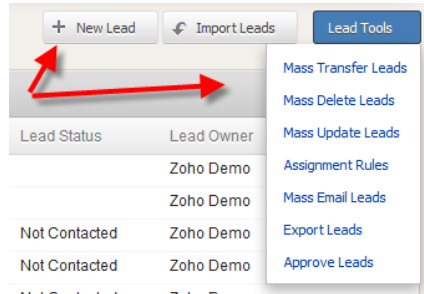
Use the List tab to view Leads, click drop downs/hyperlinks to view/edit:



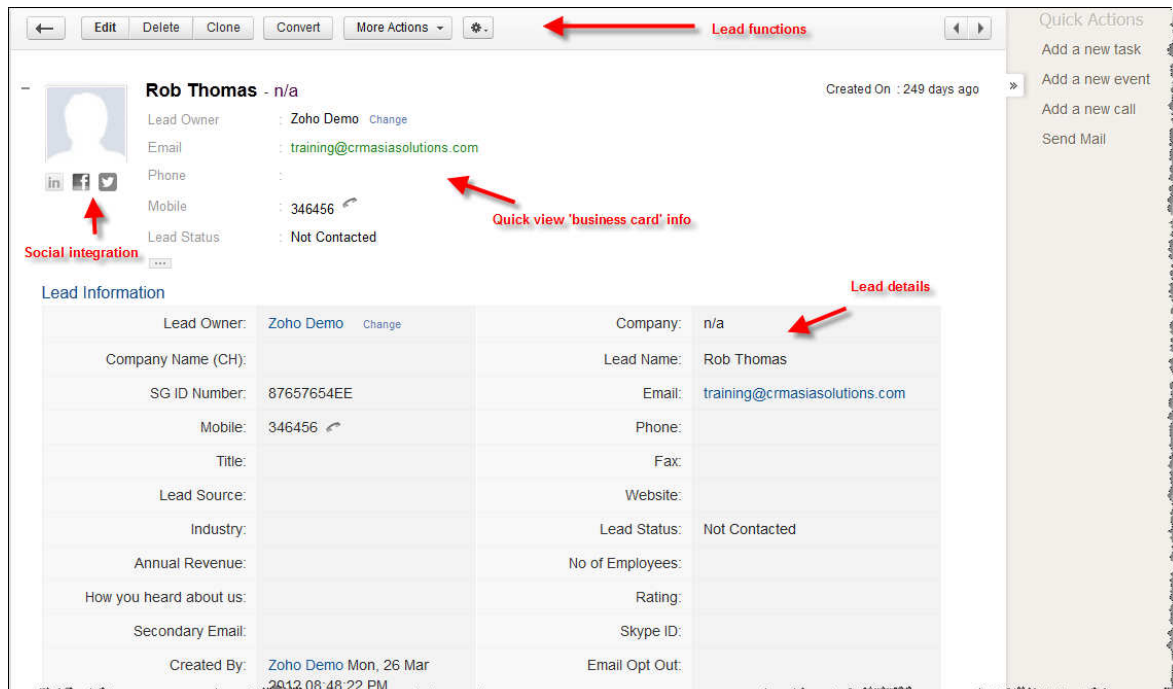


## More Actions

Use these actions to carry out various tasks on the lead data:



Click on the Lead name to view details



When in the Lead edit screen scroll down to add tasks and events.

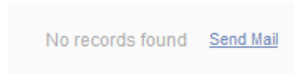
### Open Activities

	Owner Name	Subject	Modified Time	Activity Type	Due Date	Status	Start DateTime	End DateTime
<a href="#">Edit</a>   <a href="#">Del</a>	Zoho Demo	Review project	01/12/2012 10:11 AM	Events			03/12/2012 10:30 AM	03/12/2012 11:00 AM
<a href="#">Edit</a>   <a href="#">Close</a>	Zoho Demo	Send proposal	01/12/2012 10:11 AM	Tasks	05/12/2012	Not Started		
<a href="#">New Task</a> <a href="#">New Event</a> <a href="#">Log a Call</a>								

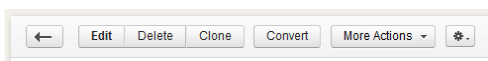


Email the Lead, track all email communication, use predefined sales step communication templates to increase your sales team efficiency and reduce ramp time.

## Emails



Use the clone or convert buttons to clone the lead, quickly creating similar typed leads or to convert a lead into a sales 'potential'. This will also create an account and a contact.

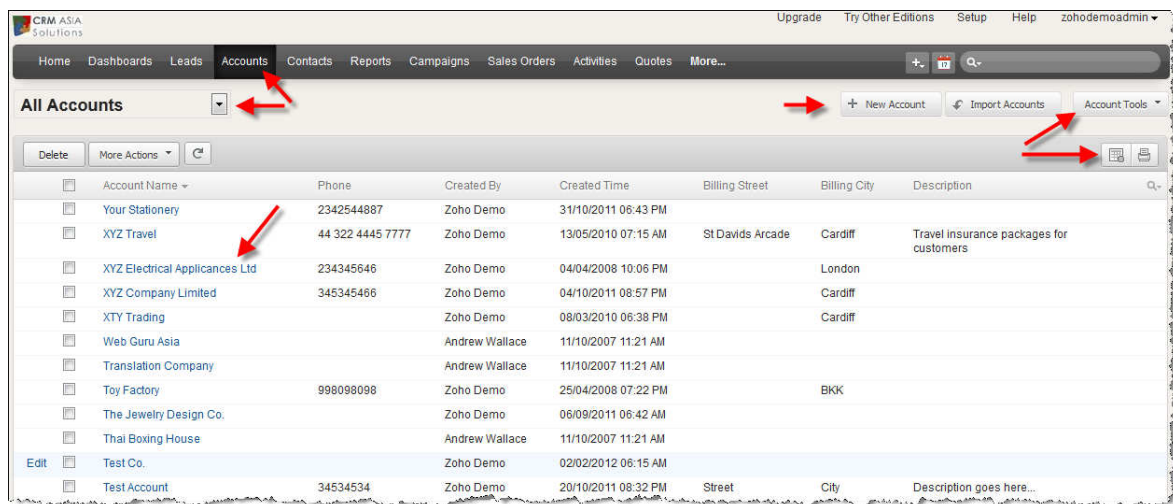


## Accounts

The same concept apply with Accounts as with leads about viewing data, click the Account name hyperlinks to view Account details.

Use the Views to filter various accounts, create views to suit your needs. Use the A B C... sort index to find accounts quickly, sort by column.

Use the Zoho Sheet View to look at your accounts and edit information in spreadsheet format, very useful for making multiple updates.



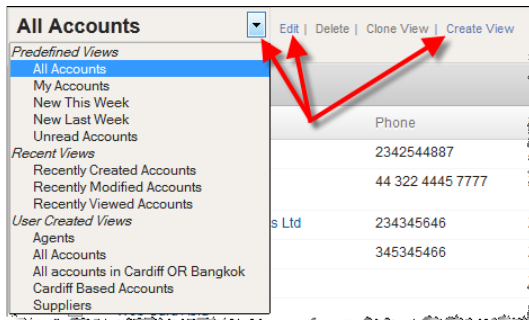
## Views

Views are a great way to quickly filter your data and can be applied to any field.

You can also make views visible to only you, or to certain or all people in your organisation.



Admins can see all views.



You can see more about creating views in our Youtube channel video:

<http://youtu.be/D-3ASz9syjw>

## Adding a New Account

Use the New Account button, enter Account details.

## Sales Opportunities or 'Potentials'

Click the Potentials tab.

Note, this and all other tabs can be renamed to match your business, eg. "Sales".

Note the various filters and ways of looking at your list of records.





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UpgradeTry Other EditionsSetupHelpzohodemoadmin

HomeDashboardsLeadsAccountsContactsReportsCampaignsSales OrdersPotentialsQuotesMore...

All Potentials

Predefined Views

All Potentials

My Potentials

New This Week

New Last Week

Closing This Month

Closing Next Month

Unread Potentials

Recent Views

Recently Created Potentials

Recently Modified Potentials

Recently Viewed Potentials

User Created Views

All opportunities over 20,000 value AND In Progress

Large Deals

EditDeleteClone ViewCreate View

+ New Potential

Import Potentials

Potential Tools

	Amount	Stage	Closing Date	Account Name	Potential Owner	Lead Source
	THB5,000.00	Needs Analysis	27/04/2012	XYZ Electrical Appliances Ltd	Brian Creswell	Web Form
	THB3,000.00	Qualification	20/04/2012	Rockwell Appliances	Brian Creswell	Web Form
	THB30,000.00	Negotiation/Review	30/04/2008	ABC Household Appliance Outlet	Brian Creswell	Web Form
	THB3,000.00	Qualification	20/04/2012	Rockwell Appliances	Brian Creswell	Web Form
	THB6,500.00	Closed Won	30/04/2008	XYZ Electrical Appliances Ltd	Brian Creswell	Web Form
	THB100,000.00	Ten Percent	29/11/2011	Nid's Training company	Zoho Demo	
	THB200,000.00	Ten Percent	30/09/2012	AIS	Zoho Demo	
	THB20,000.00	Closed Won	31/08/2010	Jenz Jewellery Shop	Zoho Demo	Cold Call
	THB100,000.00	Closed Won	24/02/2012	Co.Ltd	Zoho Demo	Cold Call
	THB200,000.00	Negotiation/Review	30/11/2012	Enterprise Sales	Zoho Demo	
	THB200,000.00	Closed Won	31/07/2011	ABC Co. Ltd	Zoho Demo	
	THB50,000.00	Closed Won	30/03/2012	Quik Computers	Zoho Demo	List Provider
	THB2,000,000.00	Closed Won	31/10/2011	Frank Knight	Zoho Demo	Friend/Acquaintance
	THB35,000.00	Closed Won	31/05/2012	Dealer Systems Asia	Zoho Demo	Trade Show
	THB10,000.00	Needs Analysis	31/10/2008	Large Farm	Zoho Demo	Public Relations
	THB2,000,000.00	Negotiation/Review	31/10/2011	BT	Zoho Demo	List Provider
	THB30,000.00	Negotiation/Review	30/12/2012	Dealer Systems Asia	Zoho Demo	Trade Show
	THB10,000.00	Proposal/Price Quote	31/03/2010	ABC Trading Co.	Zoho Demo	
	THB10,000.00	Closed Won	30/11/2011	Rob Williams	Zoho Demo	List Provider

## Sorting

Click the column headings to sort on the columns

Potential Name	Amount	Stage	Closing Date	Account Name	Potential Owner	Lead Source
----------------	--------	-------	--------------	--------------	-----------------	-------------

## TIP: Searching CRM Data from Module Lists

Use the search filters on module column headers to search your data quickly.

You can enter one or a combination of search filters to get the exact information you are looking for.

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Home Dashboards Leads Accounts Contacts Reports Campaigns Sales Orders Potentials Quotes More...

All Potentials

+ New Potential Import Potentials Potential Tools

Delete More Actions

Click this search icon and then enter one or a combination of search criteria

Potential Name	Amount	Stage	Closing Date	Account Name	Potential Owner	Lead Source
contains	=	contains	is	contains	contains	contains

Search





## Viewing a Potential

Select a Potential to view all sales activities and information associated with that single potential:

**Quik Computers-Training Course - THB50,000.00**  
Last Update : 295 days ago

Potential Owner: Zoho Demo [Change](#)  
Stage: Closed Won  
Probability (%): 100  
Expected Revenue: THB50,000.00  
Closing Date: 30/03/2012

**Potential Information**

Potential Owner:	Zoho Demo <a href="#">Change</a>	Amount:	THB50,000.00
Potential Name:	Quik Computers-Training Course	Closing Date:	30/03/2012
Account Name:	Quik Computers	Stage:	Closed Won
Course Type:		Probability (%):	100
Type:		Expected Revenue:	THB50,000.00
Lead Source:	List Provider	Next Step:	
Created By:	Zoho Demo Fri, 10 Feb 2012 06:21:05 AM	Contact Name:	Sam Smith
Campaign Source:		Renewal Date:	

**Quick Actions**  
Add a new task  
Add product  
Add a new quote

**Whom to deal with**  
Sam Smith  
at Quik Computers  
[info@crmasiasolutions.com](mailto:info@crmasiasolutions.com)  
Mobile : 234324534

Stage History, used for tracking the life cycle of the Potential

### Stage History

Stage	Amount	Probability (%)	Expected Revenue	Closing Date	Modified Time
Negotiation/Review	THB50,000.00	90	THB45,000.00	30/03/2012	10/02/2012 06:21 AM
Closed Won	THB50,000.00	100	THB50,000.00	30/03/2012	10/02/2012 06:30 AM

Don't forget, the currency that is displayed in this screen depends on what currencies you set up.

Other information and activities that are related to the record and can be seen as you scroll down the page.



#### Attachments

No records found [Desktop](#)

#### Quotes

	Subject	Quote Stage	Valid Till	Carrier
<a href="#">Edit</a>   <a href="#">Del</a>	HRIS system	Draft	29/02/2012	FedEX
<a href="#">New</a>				

#### Sales Orders

No records found [New](#)

#### Closed Activities

	Owner Name	Subject	Modified Time	Activity Type	Due Date	Status	Start DateTime	End DateTime	Call Start Time
<a href="#">Edit</a>   <a href="#">Del</a>	Zoho Demo	sales pitch	10/02/2012 06:21 AM	Calls		Completed			10/02/2012 06:13 AM
<a href="#">Edit</a>   <a href="#">Del</a>	Zoho Demo	Initial sales pitch	10/02/2012 06:21 AM	Events			13/02/2012 09:30 AM	13/02/2012 10:30 AM	
<a href="#">Edit</a>   <a href="#">Del</a>	Zoho Demo	Include training syllabus example	10/02/2012 06:21 AM	Tasks	10/02/2012	Completed			
<a href="#">Edit</a>   <a href="#">Del</a>	Zoho Demo	Send brochure	10/02/2012 06:21 AM	Tasks	10/02/2012	Completed			

#### TIP:

The related lists you see will depend on your business CRM setup but are completely customizable.

Mangoho are able to do all of this customization for you as part of an implementation project.



## Reporting

Once you have information in the CRM you can report on the data using the Reports Tab, you should have a small report available for your leads, the other reports can be seen below.

Over time, these will enable you to build a strong infrastructure for your business allowing you to make informed decisions based on real time business intelligence.

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Home Dashboards Leads Accounts Contacts **Reports** Campaigns Sales Orders Potentials Quotes More...

**Reports** Create Report Create Report Folder Report Scheduler

Zoho Reports online BI integration Configure Zoho Reports New!

**Recently Accessed Reports**

Report Name	Report Folder Name	Description	Edit	Customize
Pipeline by Stage	Potential Reports	Displays sales potentials by their Stage	Edit	Customize
Invoices by Status	Invoice Reports	Invoice based on their status.	Edit	Customize
Invoices by Account	Account and Contact Reports		Edit	Customize
Invoices by Payment Status	Invoice Reports	Shows outstanding and paid invoices	Edit	Customize
Expense Report for Current Month	Activity Reports		Edit	Customize
This month sales	Potential Reports	Sales happened this month.	Edit	Customize
Todays Calls	Activity Reports		Edit	Customize
UK Leads	Lead Reports	Export report for UK leads for email marketing solution	Edit	Customize
Open Potentials	Potential Reports	Potentials that are pending.	Edit	Customize

**Recent reports**

- Account and Contact Reports Edit Del
- Potential Reports Edit Del
- Lead Reports Edit Del
- Activity Reports Edit Del
- Campaign Reports Edit Del
- Incident Tracking and Knowledge Item Reports Edit Del
- Forecast Reports Edit Del
- Product Reports Edit Del

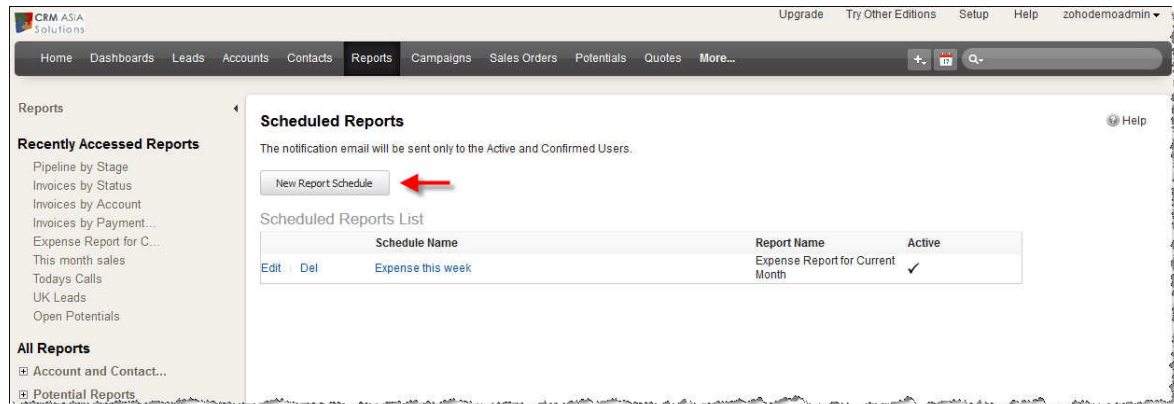
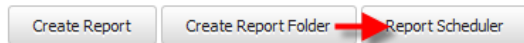
Access 25+ ready made reports in various categories



## Automated Reports

A very nice feature of Zoho CRM is that it allows you to create automated reports.

Click the Reports tab, then Report Scheduler.



Create various scheduled reports from there and then these will be sent to the recipients you define via email with an Excel attachment.

This is a great way to make sure people receive the right information direct to their inbox on a regular basis.

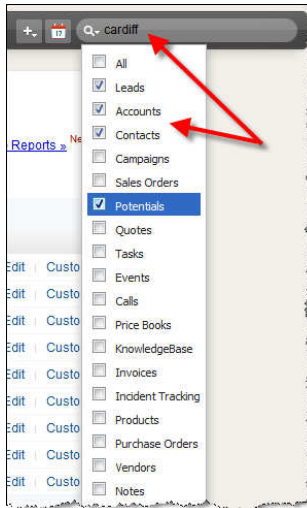


**TIP:**

**Searching for Data**

Sometimes you just need to find something quickly and easily.

For this use the Search function in the top right of the screen.



Key in the keyword or phrase, then also we recommend selecting the relevant module(s) to increase the speed and accuracy of the search, then press enter. The data will be displayed.

**Search Results: " cardiff "**

**Matching Accounts**

Account Name	Phone	Website	Account Type	Industry	Annual Revenue
<a href="#">South Wales Superbike</a>	0222 8763287687	<a href="#">www.southwalessuperbike.com</a>	Customer	Automotive	THB1,000,000.00
<a href="#">Rockwell Appliances</a>	05898098029	<a href="#">www.site.com</a>	Customer	Electronics	THB0.00
<a href="#">ABC Trading Co.</a>	8798798798	<a href="#">www.abc-trading.com</a>	Partner	Automotive	THB0.00
<a href="#">XTY Trading</a>				Manufacturing	THB0.00
<a href="#">XYZ Travel</a>	44 322 4445 7777	<a href="#">www.xyz.com</a>	Prospect	Small/Medium Enterprise	THB0.00
<a href="#">XYZ Company Limited</a>	345345466	<a href="#">www.xyz.com</a>		Non-Profit	THB0.00
<a href="#">Nid's Training company</a>			Prospect		THB0.00

1 to 7

**Matching Contacts**

Email	Phone	Fax	Mobile	Full Name
<a href="#">sonia@xyz.com</a>	44 322 4445 7777			<a href="#">Sonia Jones</a>
<a href="#">test@test.com</a>			98798798	<a href="#">Nidy Jones</a>
				<a href="#">Bill Smith</a>

1 to 3

No matching record(s) found for Leads and Potentials.



## TIPS & HINTS FOR SALES REPS

Tracking your customers, contacts, and deals is as easy as following the steps below. All of your information is related, so it's easy to access and manage.

When you create and qualify a Lead, the Lead details become an 'Account', ie. an established business relationship within your organisation.

NOTE: You are able to skip the Lead step and create an account directly, if you are sure this account will be a business relation in the future.

REMEMBER: Once a lead has been converted into an account, the account is the starting point and the key to accessing all of your related data.

### First Create the Account

The first step is to create the account. You'll want to create an account for every company you do business with - including customers, partners, and competitors.

- Go to the Accounts tab and click **New Account**.
- Fill in the information for the account.
- Don't forget to fill in the **Account Name** - it's a required field!
- Click **Save** to save the account and view the detail page.
- When editing any data, required fields are marked. You won't be able to save your data if you forget to fill them in.

### Naming Accounts

- For companies with many offices, create one account for corporate headquarters and additional accounts for each office location.
- Fill in the **Account Site** field with the location of the office, e.g., Headquarters, London, or Paris.
- Link each location account to the main account using the **Parent Account** field.

### Then Link Contacts to the Account

#### Contact Tips

- To create multiple contacts for one account, click **Save & New** instead of **Save**. You can then immediately create a new contact for that account.
- Every contact you create for an account is listed in the Contacts related list on the account detail page.

Now create contacts for each individual associated with the account you just created. The fastest way to do this is to start on the account detail page.

- View the detail page for the account.
- Try using the sidebar search to quickly locate the account.
- Scroll down to the Contacts related list and click **New**.
- Fill in the information for the contact.



- Don't forget to fill in the **Last Name** - it's a required field!
- Click **Save** to save the contact and view the Contact detail page.

## And Finally, Create Your Potentials

### Potential Tips

- Zoho CRM uses the term 'Potential', you may be familiar with the term 'Opportunity' from other CRM software, they are in fact the same thing.
- Name each potential in a uniform manner if possible, it is advisable to create a company standard on how to name potentials.
- Every potential you link to a contact is listed in the Potentials related list on the contact detail page. The potential also rolls up to the account and displays in the Potentials related list on the account detail page.

Finally, create a potential for each business deal you are working on, try not to bulk them together. Potentials can be linked to accounts and, optionally, to contacts.

- If you are working the deal with a specific person, start by viewing that contact. Otherwise, view the account associated with the deal.
- Try using the sidebar search to locate the contact or account.
- Scroll down to the Potentials related list and click **New**.
- Fill in the information for the opportunity.
- Remember to fill in all of the required fields.
- Click **Save** to save the potential and view the potential detail page.
- If you add a Potential to an Account make sure you add the Potential Contact Name too, this may be used in your emails.
- For potentials linked to a contact, notice that the **Contact Name** displays in the Contact Roles related list on the potential detail page.



## USEFUL LINKS:

**Web** [www.mangoho.com](http://www.mangoho.com)

**Blog** [www.mangoho.com/blogs](http://www.mangoho.com/blogs)

**Email** [info@mangoho.com](mailto:info@mangoho.com)

**facebook** <https://www.facebook.com/pages/mangohocloud/495163773893916>

**twitter** [twitter.com/MangohoCloud](https://twitter.com/MangohoCloud)

**You Tube** Watch our Channel [youtube.com/mangohocloud](https://youtube.com/mangohocloud)

**Newsletter** Scan and sign up for periodic Zoho Tips & Tricks!







**NOTES:**