Zoho CRM

Getting Started

Guidelines for Beginners

Mangoho
Cloud Solutions for Small Businesses
W: www.mangoho.com | E: info@mangoho.com

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

CRM – Customer Relationship Management

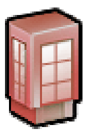
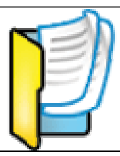
Target Audience

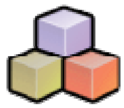
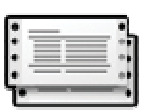
- Sales Reps, Managers and Executives
- Lead Managers, Event Managers and Marketing Managers
- Customer Support Agents, Support Managers and Executives
- Accounting Managers and Stock Handlers
- Business Managers, Executives and Top Management
- CRM System Integrators

Zoho CRM Modules

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

Glossary Terms & Functions

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

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

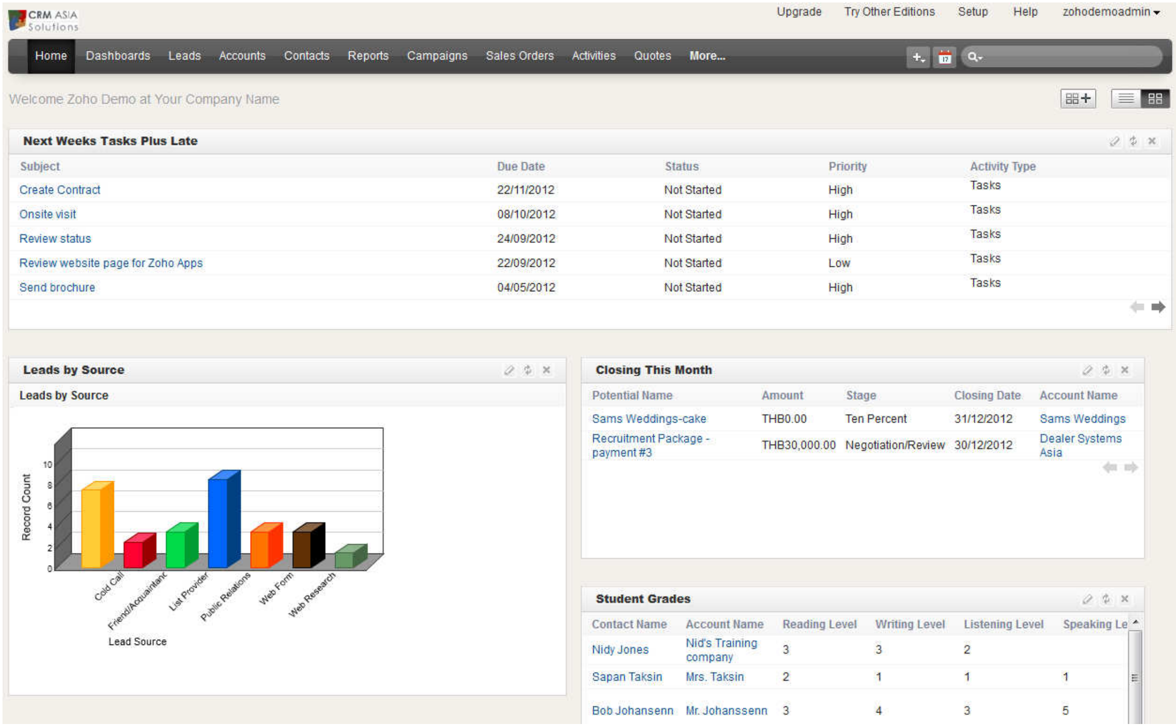
Customise the Home Page to match your business needs and the needs of your staff, to make your business more efficient.

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.

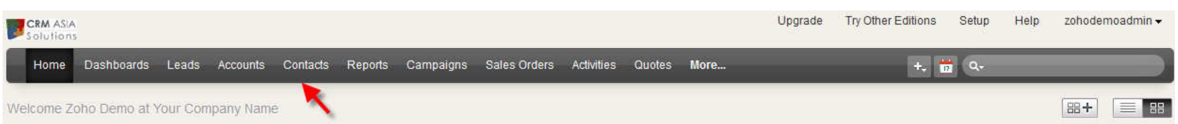
And so on… There are endless possibilities.



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.



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.

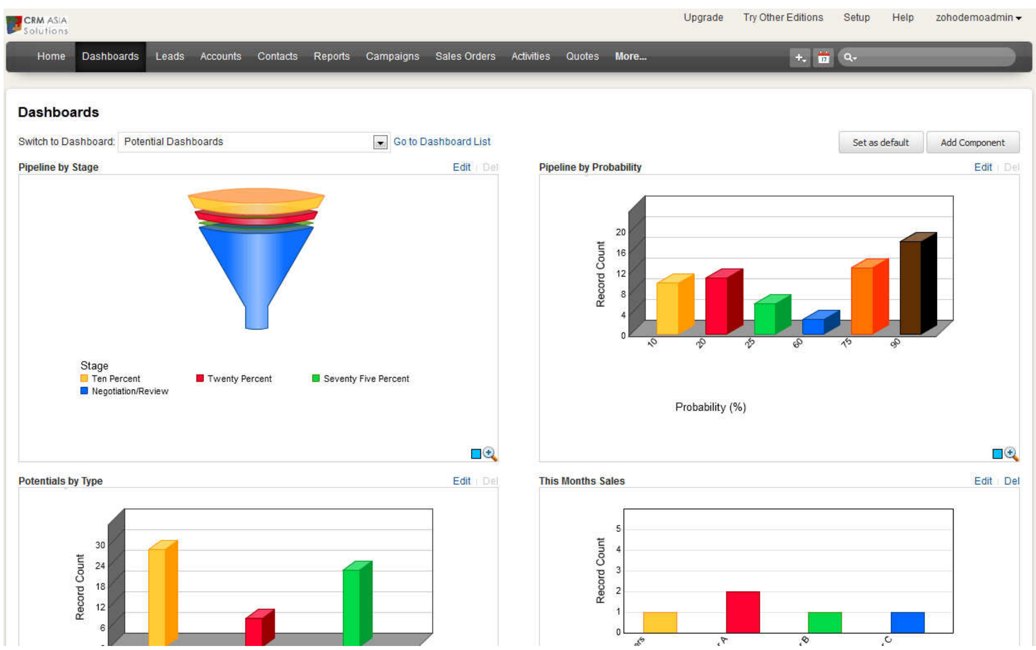
Reports

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

Dashboards

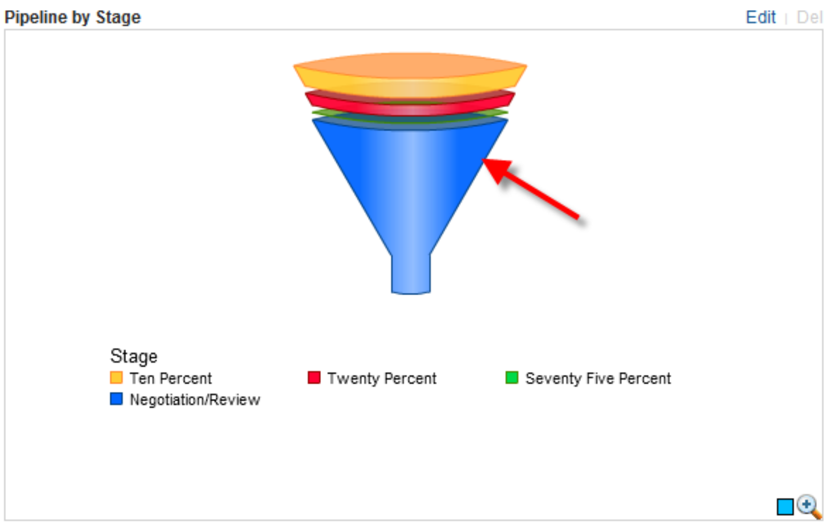
These give you a snapshot into the status of leads, potentials, sales activities, etc.

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.

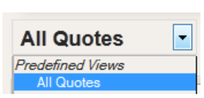
For example, you want to filter all potentials in the Negotiation stage, click the blue Negotiation section:



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	THB3,000.00
						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

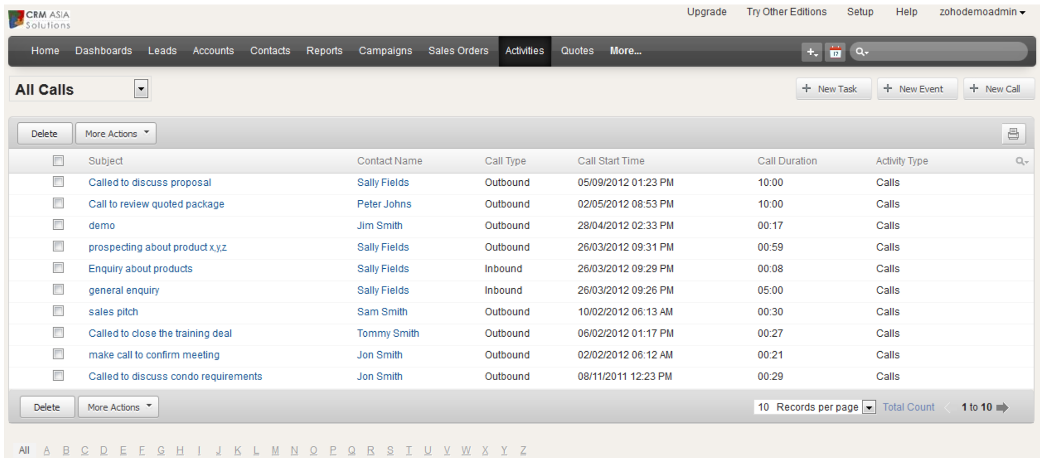
Quotations
Shows you quotations, you can filter by the 'View':



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

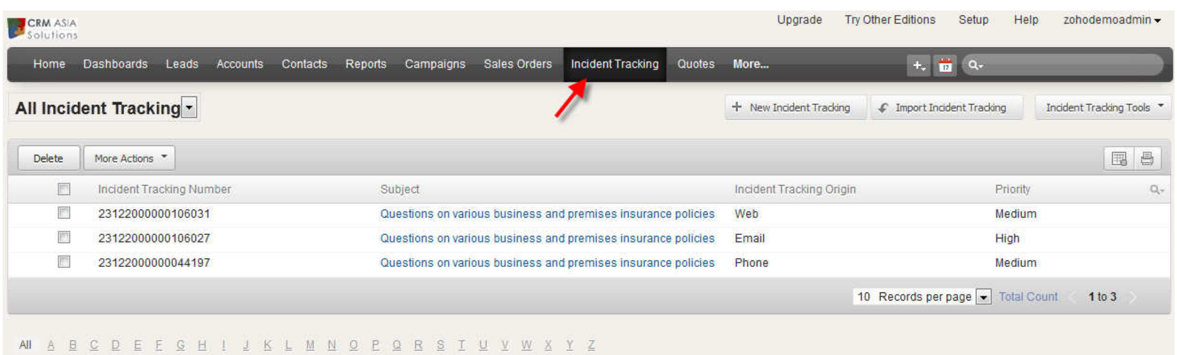
Know what your team is doing each day. Use the various filter criteria to drill down, click an event to see details.



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':



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.

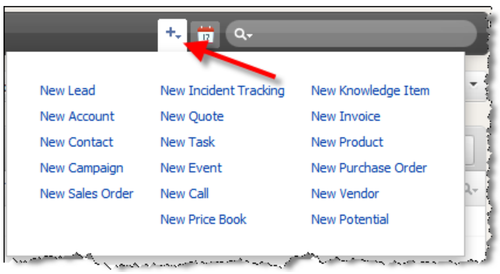
The "**More…**" tab shows additional CRM modules available, from solutions (knowledgebase) to product books, invoicing etc.

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?

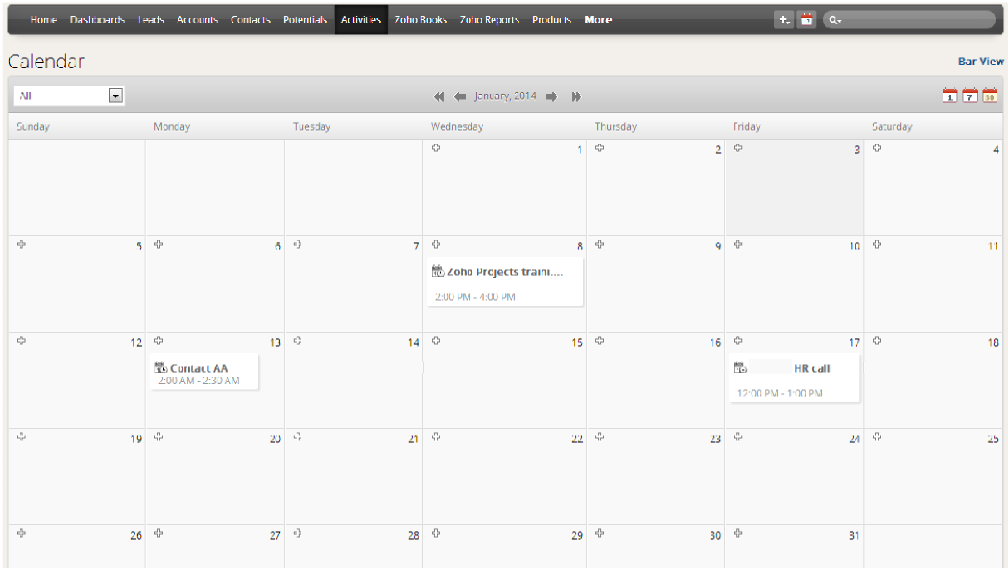
Use the Quick Create function in the top right of the screen, then select what you would like to create:



Calendar

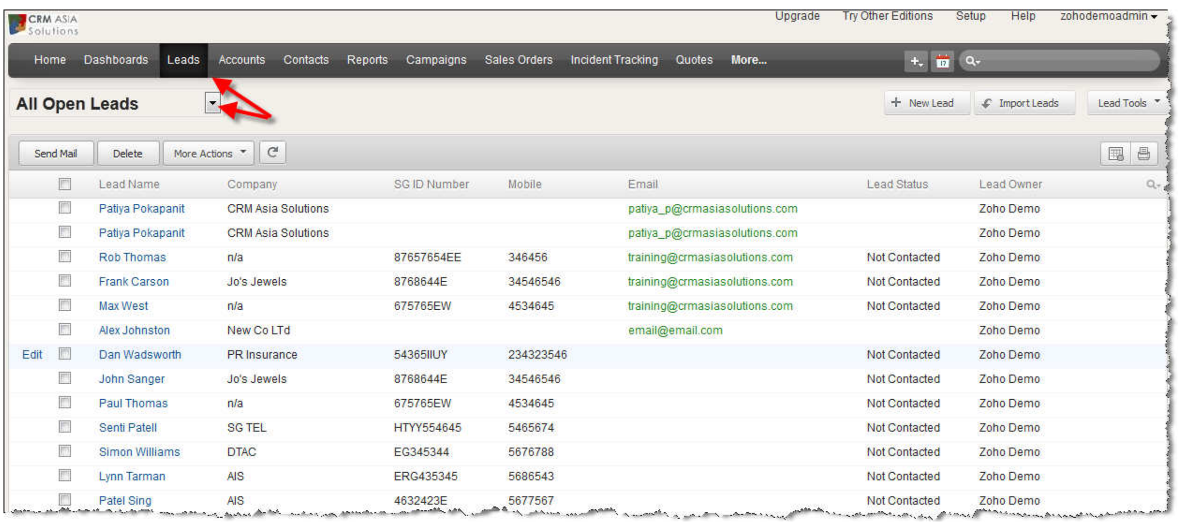
Use the Calendar icon in the top right of the screen to see your team calendar, select daily, weekly or monthly view.

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:



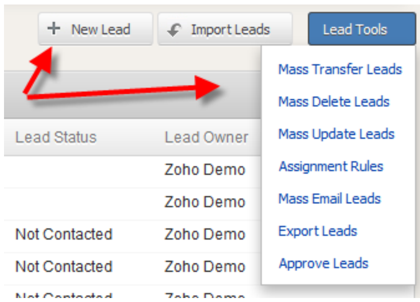
Leads

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

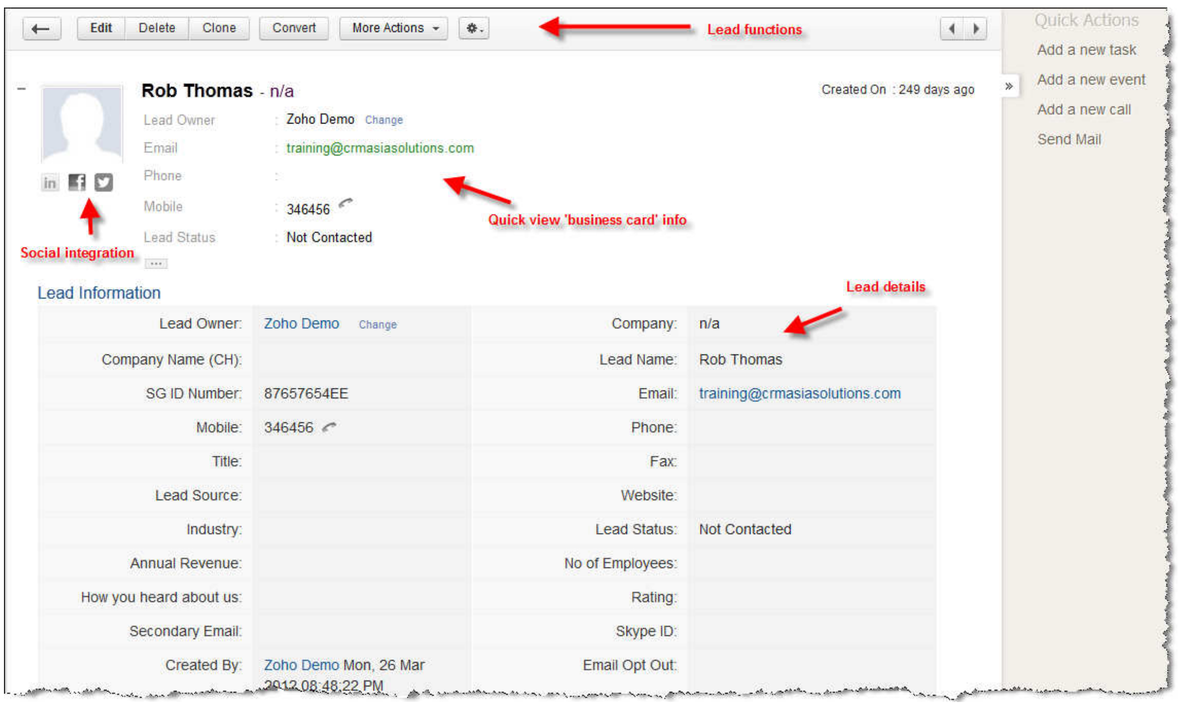


More Actions

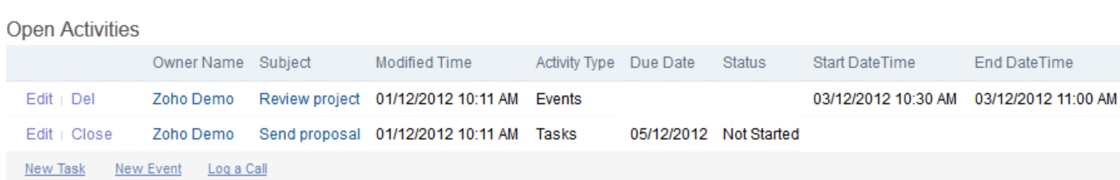
Use these actions to carry our various tasks on the lead data:



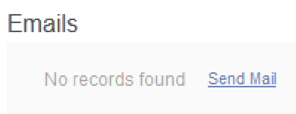
Click on the Lead name to view details



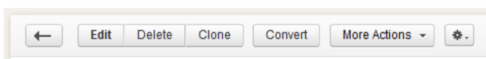
When in the Lead edit screen scroll down to add tasks and events.



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



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.

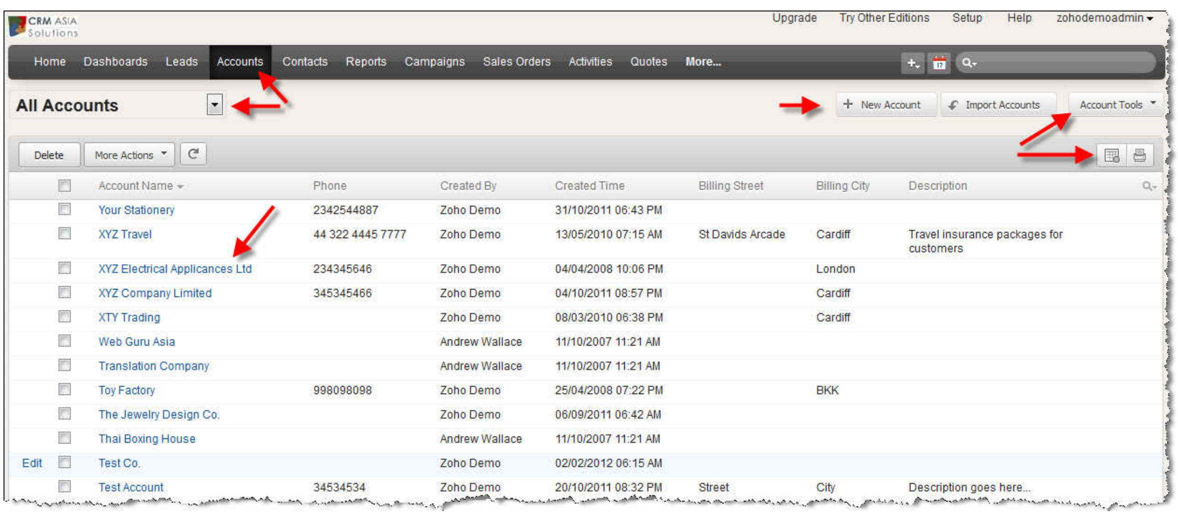


Accounts

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.

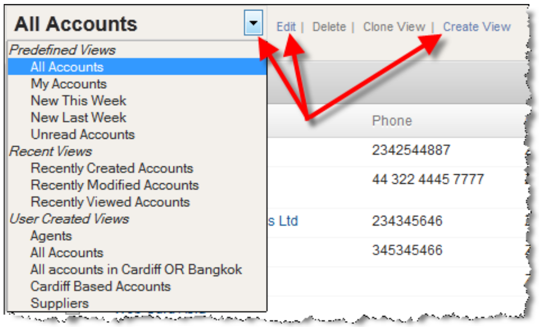


Views

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.

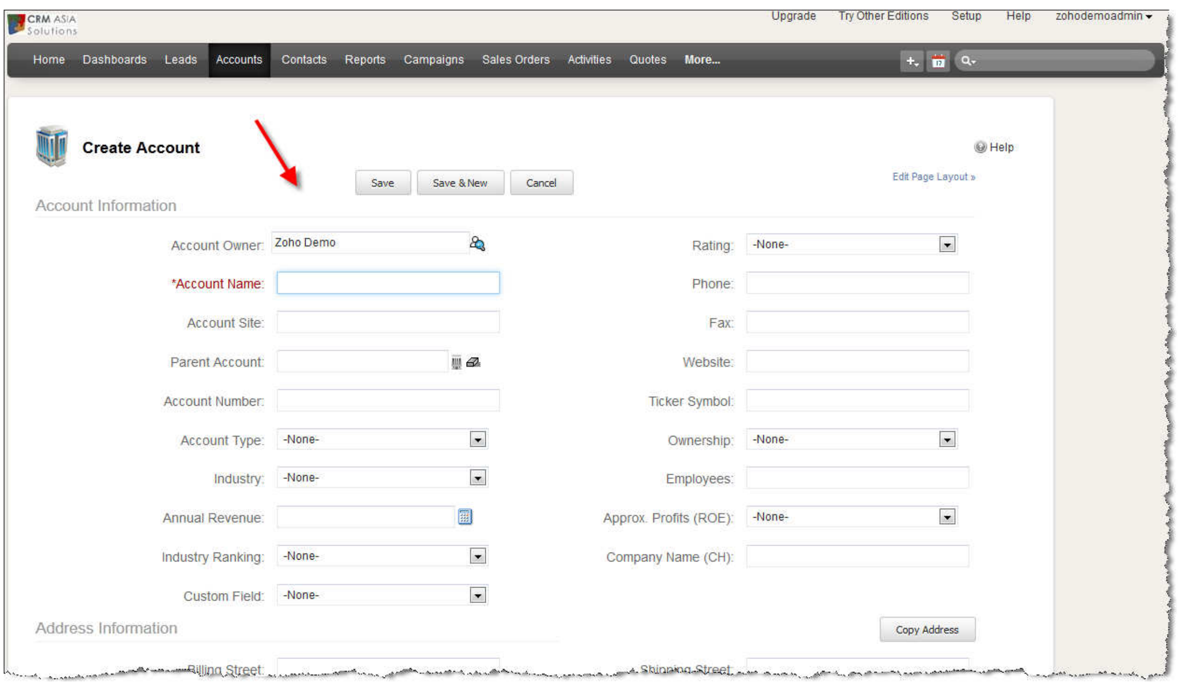


You can see more about creating views in our Youtube channel video:

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

Adding a New Account

Use the New Account button, enter Account details.

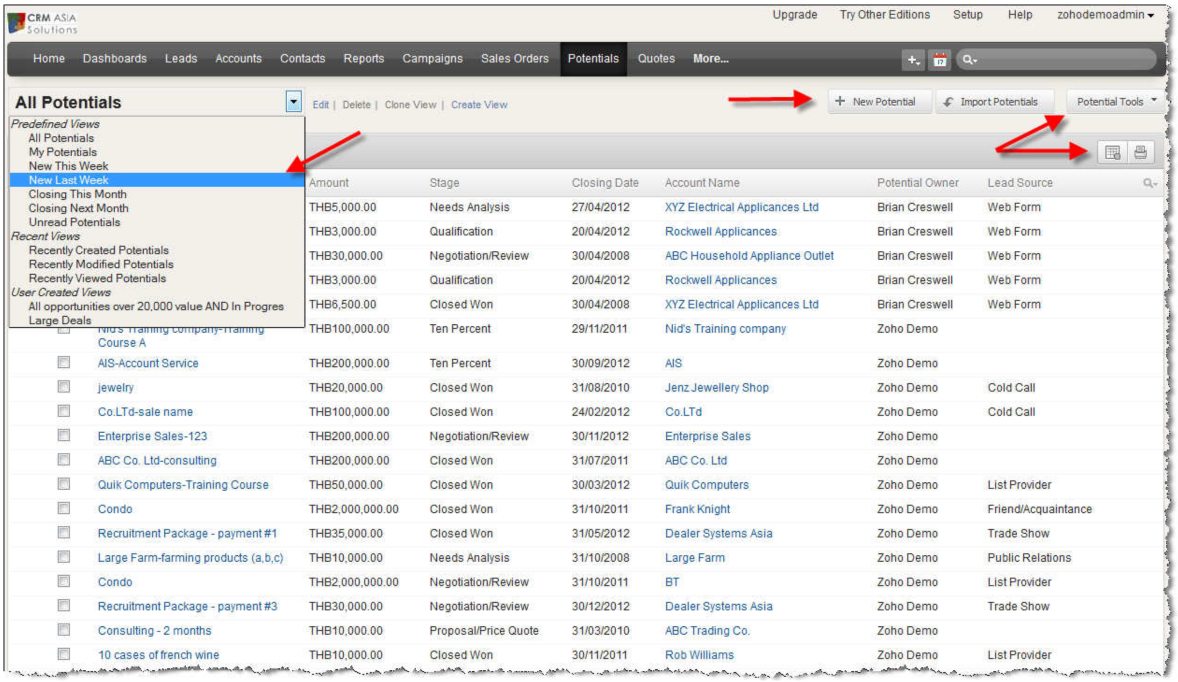


Sales Opportunities or 'Potentials'

Click the Potentials tab.

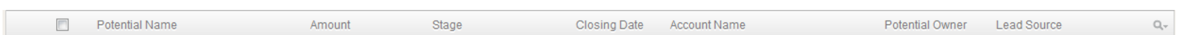
Note, this and all other tabs can be renamed to match your business, eg. "Sales".

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



Sorting

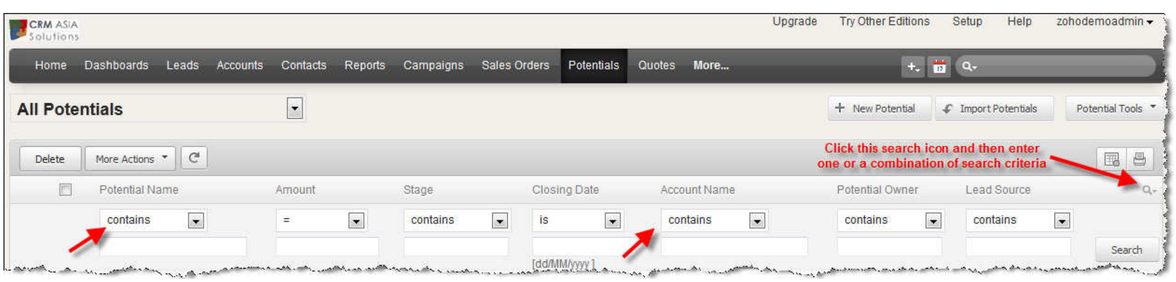
Click the column headings to sort on the columns



TIP: Searching CRM Data from Module Lists

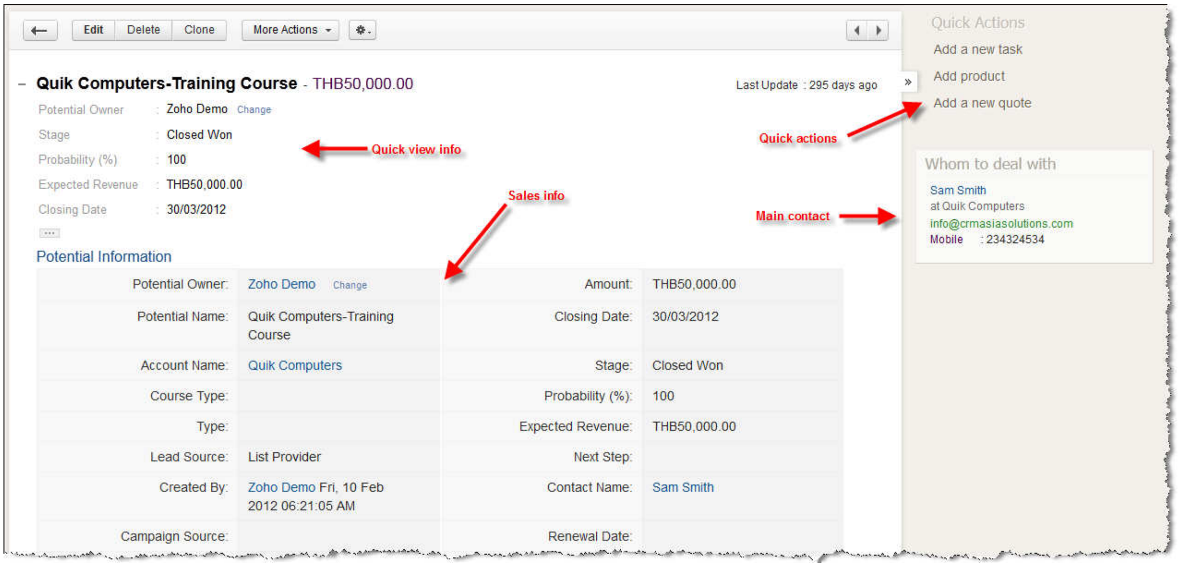
Use the search filters on module column headers to search your data quickly.

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



Viewing a Potential

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



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
Edit | Del	HRIS system	Draft	29/02/2012	FedEX

New

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
Edit | Del	Zoho Demo	sales pitch	10/02/2012 06:21 AM	Calls		Completed			10/02/2012 06:13 AM
Edit | Del	Zoho Demo	Initial sales pitch	10/02/2012 06:21 AM	Events			13/02/2012 09:30 AM	13/02/2012 10:30 AM	
Edit | Del	Zoho Demo	Include training syllabus example	10/02/2012 06:21 AM	Tasks	10/02/2012	Completed			
Edit | Del	Zoho Demo	Send brochure	10/02/2012 06:21 AM	Tasks	10/02/2012	Completed			

TIP:

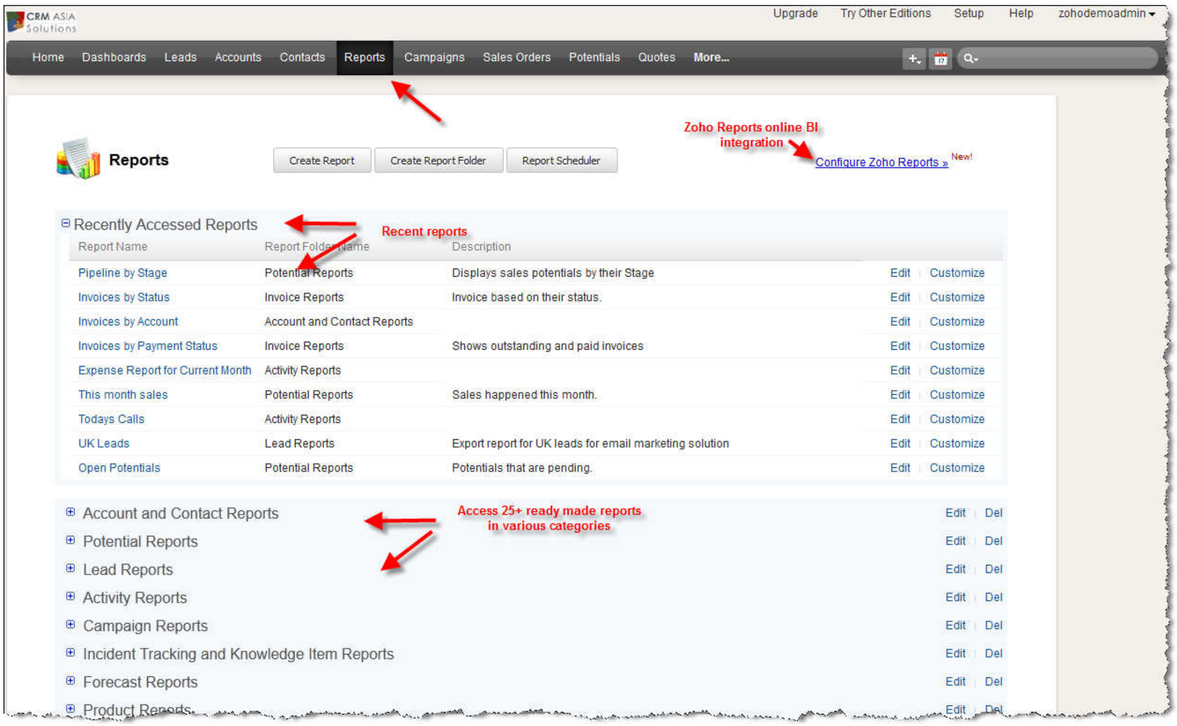
The related lists you see will depend on your business CRM setup but are completely customizable.

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.

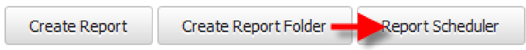
Over time, these will enable you to build a strong infrastructure for your business allowing you to make informed decisions based on real time business intelligence.

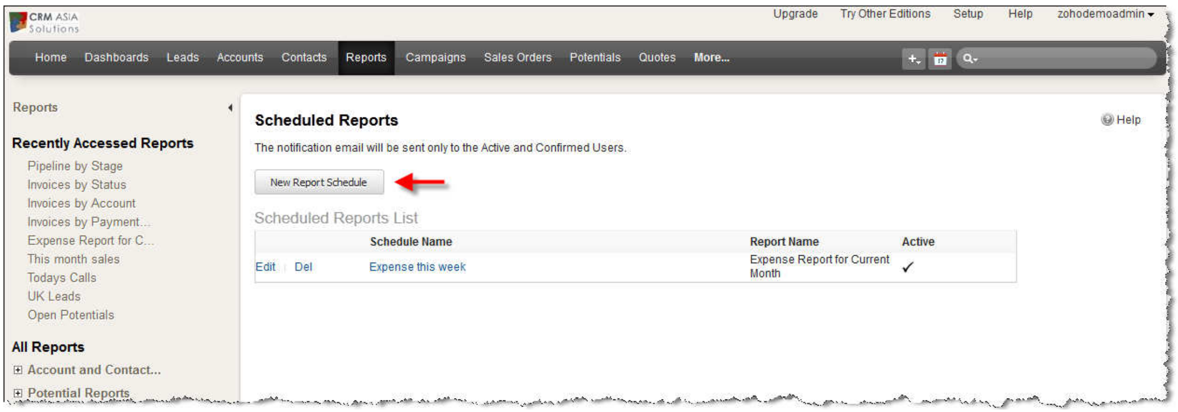


Automated Reports

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.

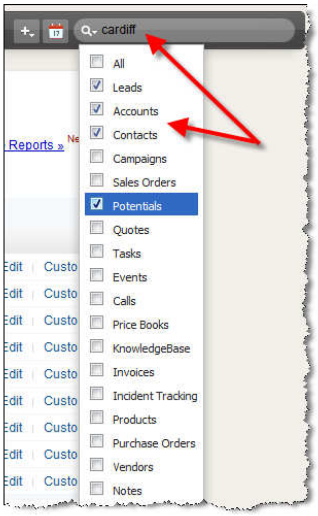
This is a great way to make sure people receive the right information direct to their inbox on a regular basis.

TIP:

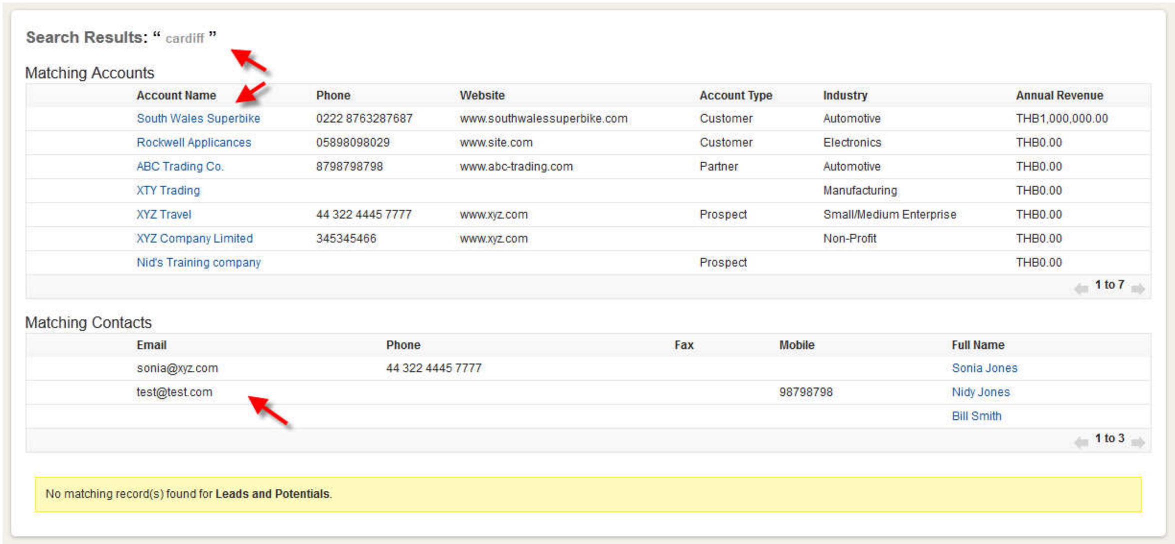
Searching for Data

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
South Wales Superbike	0222 8763287687	www.southwalessuperbike.com	Customer	Automotive	THB1,000,000.00
Rockwell Applicances	05898098029	www.site.com	Customer	Electronics	THB0.00
ABC Trading Co.	8798798798	www.abc-trading.com	Partner	Automotive	THB0.00
XTY Trading				Manufacturing	THB0.00
XYZ Travel	44 322 4445 7777	www.xyz.com	Prospect	Small/Medium Enterprise	THB0.00
XYZ Company Limited	345345466	www.xyz.com		Non-Profit	THB0.00
Nid's Training company			Prospect		THB0.00

1 to 7

Matching Contacts

Email	Phone	Fax	Mobile	Full Name
sonia@xyz.com	44 322 4445 7777			Sonia Jones
test@test.com			98798798	Nidy Jones
				Bill Smith

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
Blog	www.mangoho.com/blogs
Email	info@mangoho.com
facebook	https://www.facebook.com/pages/mangohocloud/495163773893916
twitter	twitter.com/MangohoCloud
YouTube Watch our Channel	youtube.com/mangohocloud
Newsletter	Scan and sign up for periodic Zoho Tips & Tricks!

NOTES: