

ZOHO CRM

Zoho CRM: An Overview

- About Zoho
- Sales cycle
- Capture leads with multichannel
- Prioritize leads
- Distribute and follow up
- Analyze sales performance
- Customize and extend



About Zoho

20 Years

130+ Countries

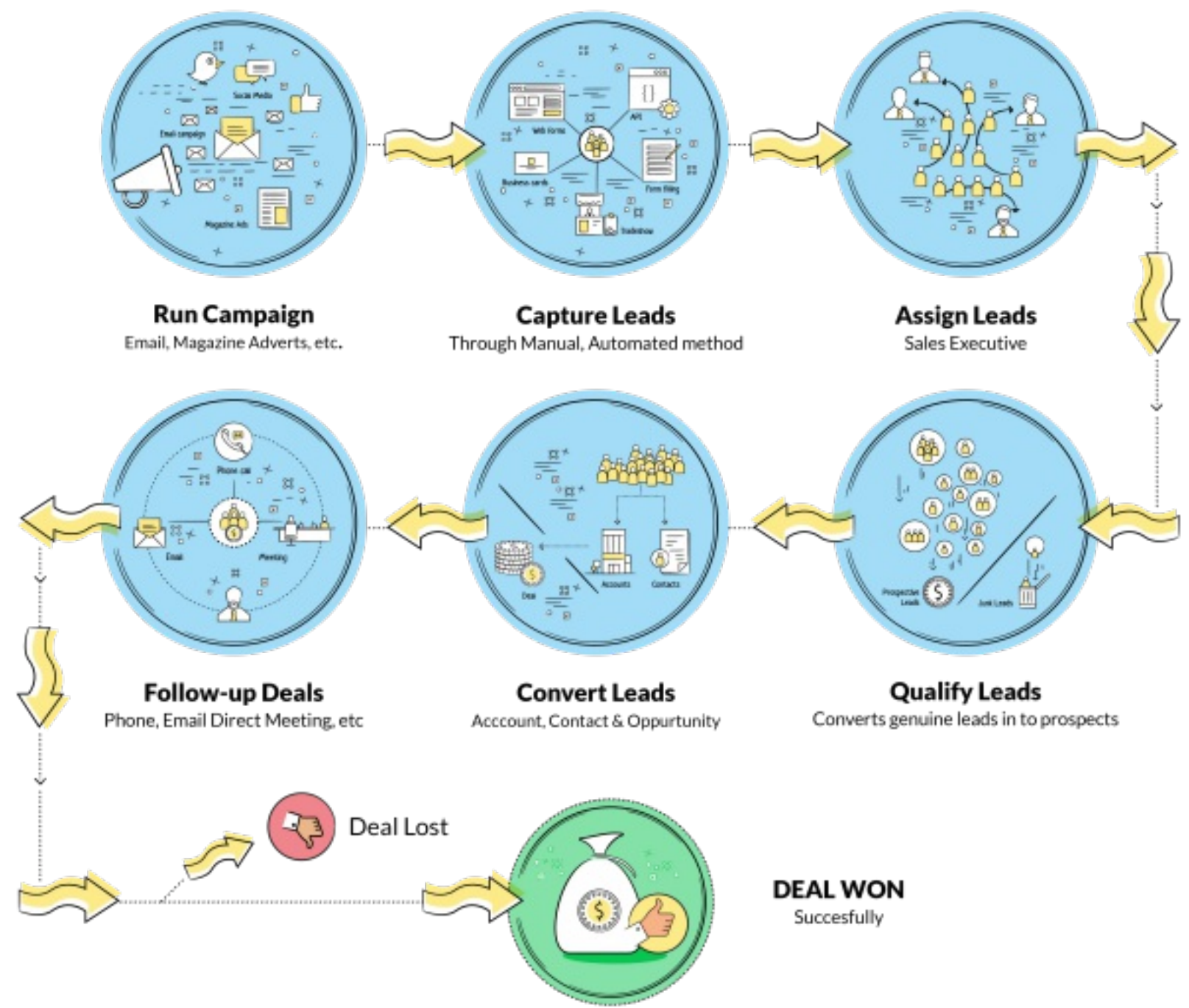
7+ Locations

4,000+ Employees

Bootstrapped, Profitable



Sales Cycle





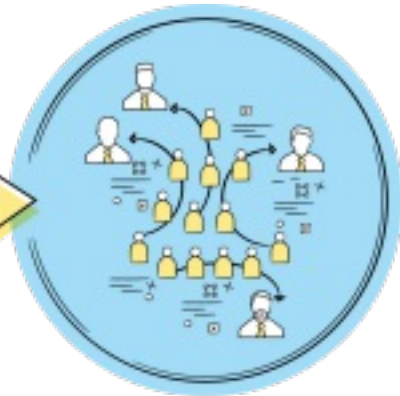
Run Campaign

Email, Magazine Adverts, etc.



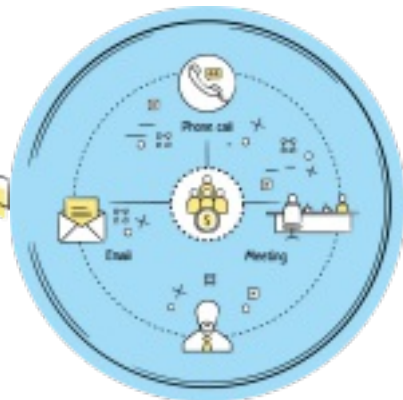
Capture Leads

Through Manual, Automated method



Assign Leads

Sales Executive



Follow-up Deals

Phone, Email Direct Meeting, etc



Convert Leads

Account, Contact & Opportunity



Qualify Leads

Converts genuine leads in to prospects



Deal Lost



DEAL WON

Successfully



Capture leads with Multichannel

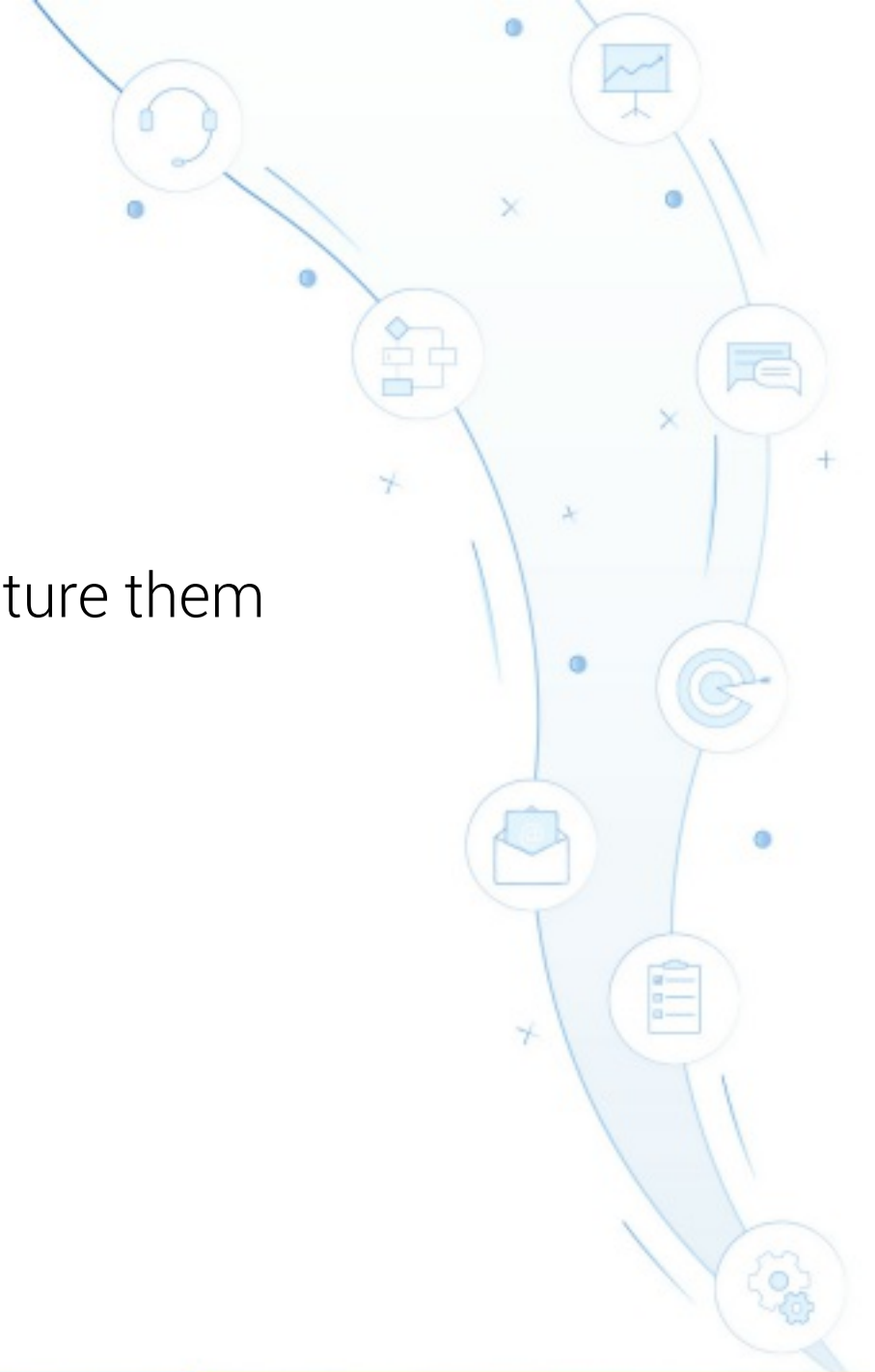
- Website
- Google Adwords
- Telephony
- Trade show
- Facebook, Twitter, LinkedIn & Google+
- Email



Website

Embed a CRM form in your website.

Make your website visitors fill in the forms and capture them as leads.



SalesInbox

First of it's kind email client.

Add leads directly from your Inbox to your CRM.

Simply drag & drop to convert leads into deals.



SalesInbox

DEALS

David Miller	Yesterday
Request for sample logo de...	\$ 5,000.00
Adam Johnson	Jul 12
Web design deal- confirmat...	\$ 3,000.00
Martin Taylor	Jul 12
Reg: Price plans	\$ 4,000.00
Valarie Thomas	Jul 02
Clarification in pricing	\$ 10,000.00
George Faulkner	Jun 31
Demo request	\$ 4,000.00
Patrick John Smith	Jun 21
Need business cards desig...	\$ 4,000.00
Sharon Glaze	Jun 13
Product Demo	\$ 4,500.00

CONTACTS & LEADS



James Carter	10:40
Clarification in the design process	
Maria Thomas	Yesterday
Demo request	
Steve Johnson	Jul 6
Plans and benefits	
Sandra Evans	Jul 4
Latest upgrade?	
Warren Hasting	Jul 4
Re:Welcome onboard!	
James Carter	Jun 22
Clarification in the design process	
John Dykes	Jun 22
Reminder: Portfolio	

NOT IN CRM

Sarah Turner	04:08 PM
To know more about the product!	
Sandra Evans	10:20 AM
Tradeshaw on 12/7/2016	
Twitter	9:47 AM
Follow James Carter on Twitter!	
Charles Jones	7:40 AM
Interested in your product	
Nancy Parker	Yesterday
Webinar registration	
Deborah Smith	Yesterday
Loved your tradeshow	
Veena Trivedi	Yesterday
Like to know more	

COLLEAGUES

Robert Yonker, Me (2)	Yesterday
Re: Final Attempt	
Jennifer from Zylker	Jul 11
Choose the right plan	
Elizabeth Leon, Me (2)	Jun 13
Re: quick question	
Manish Sharma	Jun 6
New contact?	
Rose Edward	Jun 2
Trying to connect	
Elizabeth Leon, Me (2)	Jun 30
Re: Let's Schedule a Call	

PhoneBridge Platform

Integrated with more than 24 leading telephony vendors



AVAYA

RingCentral

ringo

twilio
CLOUD COMMUNICATIONS

Asterisk

Vonage
Business

JIVE



HubThunder

Office@Hand

ikonTel

Ameyo Engage

KIXIE

amazon
web services

INePLA
telekommunikationslösungen

sipgate

ActivePBX
Phone Systems - Evolved

Go Integrator
by mondago

DUOCOM

SynPBX

aircall

Social



Social

Fully integrated with



Add leads to CRM from Social channels.

Receive real-time customer actions through SalesSignals.



Google Adwords

Know which leads come from Adwords.

Quickly find the Ads that give you the best ROI.

Google AdWords

Zoho CRM for Google AdWords provides information about your Google spending and ROI.

Account Summary Conversion Failures Metrics All Time

Zyker Show Export Conversion Status also

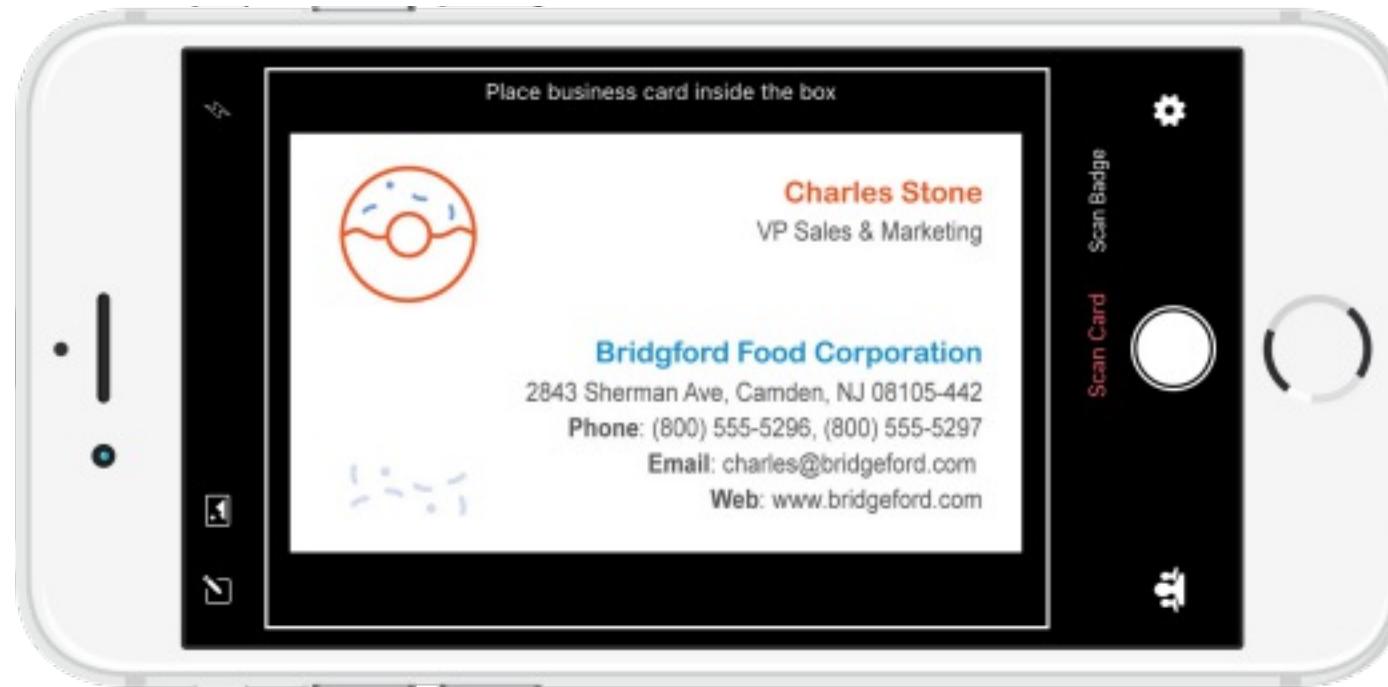
Impressions	Clicks	Leads/Contacts Created	Leads Converted	Potential Won	Spending (cost)	Conversion Spending	Spending Wasted	ROI
480	272	191	85	\$ 35693.24	\$7683.44	\$3625.23	\$2054.22	12.0

Campaigns Adgroups Ads **Keywords**

KEYWORD	IMPRESSIONS	CLICKS	LEADS/CONTACT CREATED	LEADS CONVERTED	POTENTIAL WON	SPENDING (COST)	ROI	DETAILED STATS
lex wireless printer	120	79	63	38	\$ 17659.43	\$1752.28	8.0	View
leser printer	87	66	47	23	\$ 7064.87	\$871.45	6.0	View
wireless printers	64	35	28	14	\$6245.72	\$793.73	5.0	View

Tradeshaw

Quickly scan the business cards to get them inside CRM.



Your leads are in, what's next?



Prioritize leads with Scoring rules

1 Lead Status ▼ is ▼ Pre Qualified × -

AND

2 Lead Source ▼ is ▼ Trade Show × -

AND

3 Industry ▼ is ▼ Technology × - +

Criteria Pattern ((1 and 2) and 3) [Edit Pattern](#) ⓘ

Distribute leads with Assignment rules

Define rules to assign the leads to right owners.

1.Criteria

1 Country is USA

2.Ownership

Assign To Quinn Rivers

Assign to users with a round-robin pattern.

Choose a round robin list from: Users

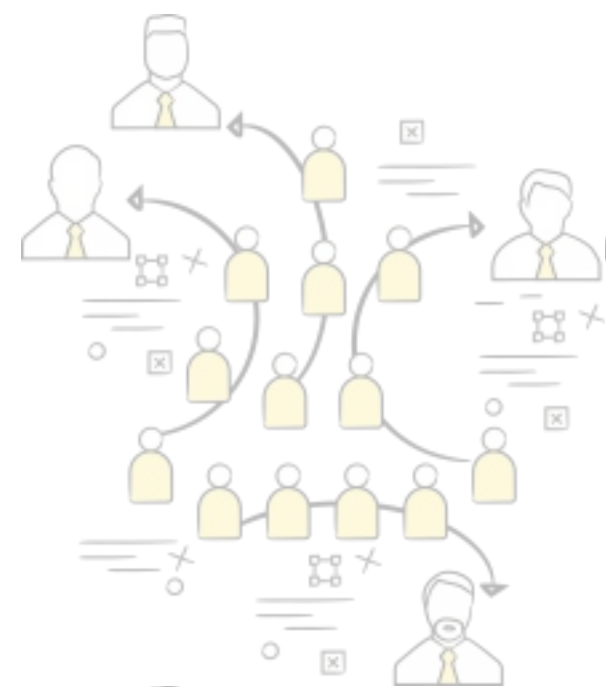
Search Users

- Amelia Burrows
mil.burrows@zyker.com
- Jeff Stevens
jeffstevens@zyker.com
- Quinn Rivers
quinnrivers@zyker.com
- Raghav Rao
raghavrao@zyker.com
- Tai Chang
taichang@zyker.com

Add

- Alicia Banks
aliciabanks@zyker.com
- Martha Hills
marthahills@zyker.com

Select All



Filter with Custom views & Advanced Filters

Quickly find leads that need immediate attention

One without notes in last 30 days or deals without having a open task.

FILTER LEADS BY



Activities

Email Status

In last

and status is

opened

not opened

bounced

opened & not replied

✓ sent

not sent

opened

not opened

received

not received

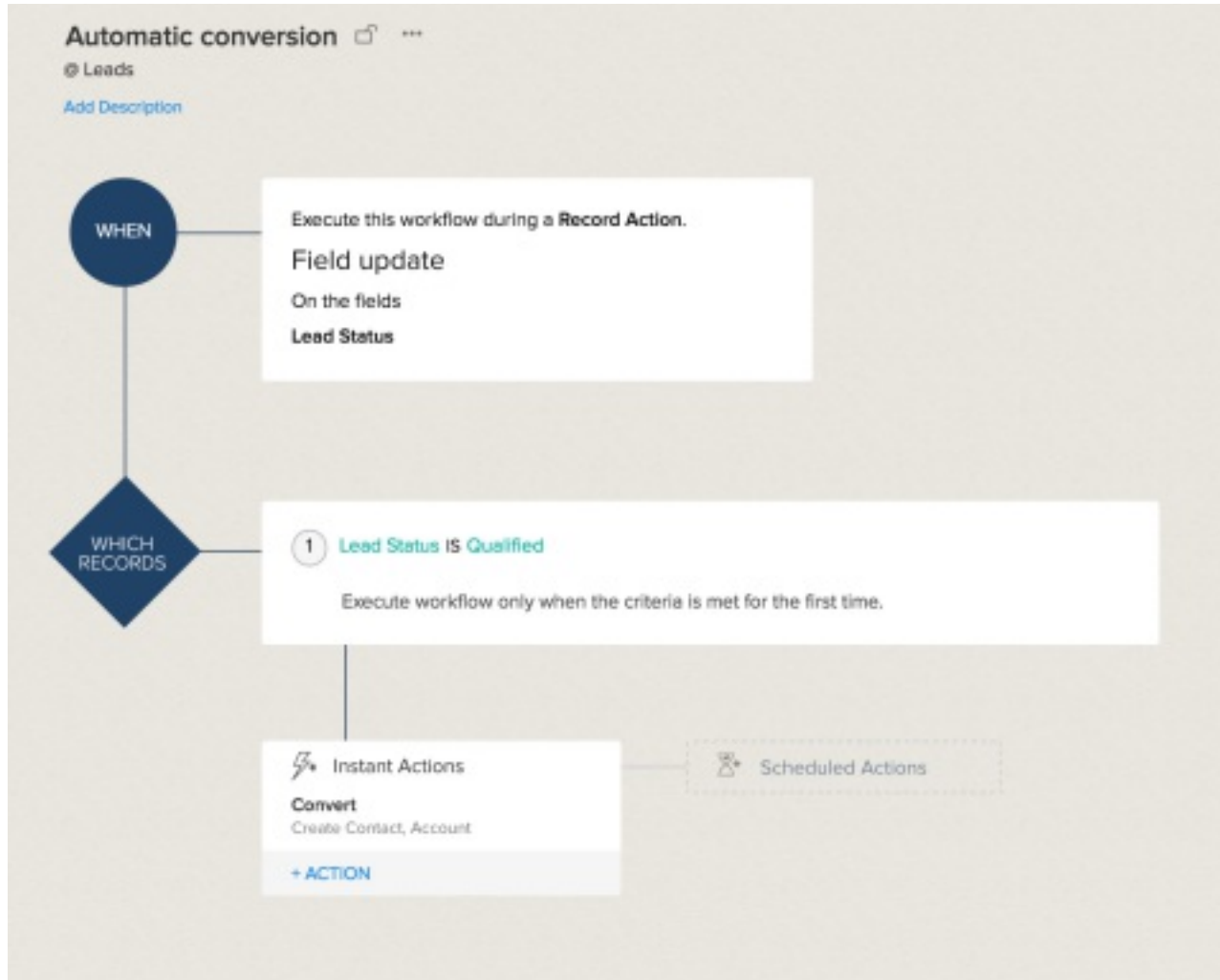
bounced

opened & not replied

Phone



Nurture leads with Workflows



- Automate lead follow up using workflow rules.
- Set up drip campaigns to nurture and qualify leads.



Follow up in realtime with SalesSignals

Realtime notifications based on customer action from:
Email, Call, Chat, Survey response, Support ticket, Social interaction.

The screenshot displays a CRM interface with a navigation bar at the top containing 'Home', 'Feeds', and 'Leads'. The main area is divided into two sections. On the left, under 'All Leads', there is a table with columns for 'LEAD NAME', 'MOBILE', 'COMPANY', and 'EMAIL'. The table lists several leads, including Ruth Garcias, Scott Gills, and Gray Davis. On the right, a 'SalesSignals' panel shows a list of notifications from various contacts, such as Melinda Anderson, George Smith, Michael Wright, Gray Davis, Joe Hackett, and Robert Bauer, with details on their actions and timestamps.

LEAD NAME	MOBILE	COMPANY	EMAIL
Ruth Garcias	8714572785	AT communications	ruthgarcia73@yahoo.com
Scott Gills		Minerva Publication	Scott_minerva@yahoo.com
Gray Davis	9957854578	Treble Notes Inc	gravy_davis@inc.com

Total Count: ###

SalesSignals

- Melinda Anderson** (Ventura Capitalists) - 12:37 PM: Need information about the... (3)
- George Smith** (Treble Notes Inc) - 12:16 PM: 9259246472
- Michael Wright** (Smithson Publication) - 11:54 AM: Sent a Message (2)
- Gray Davis** (Treble Notes Inc) - 09:16 AM: Mentioned @zyker
- Joe Hackett** (H I D Corporation) - Jan 20: Responded - Premium Store - Fee... (1)
- Robert Bauer** (Tory and Prescott Pvt Ltd) - Jan 08: Opened - Thank you for visiting... (2)

Follow up at the right time with Zia

Suggests the best time to reach your contacts.
Auto suggests Macros for recurring actions.

The screenshot displays the Zia CRM interface. At the top, there is a navigation bar with tabs for Home, Feeds, Approvals, Leads, Accounts, Contacts, Deals, and Activities. Below the navigation bar, a welcome message for Amelia Burrows is shown. The main area contains a task list with columns for Due Date, Subject, Priority, Status, Related To, and Lead/Contact. A popup window titled 'BEST TIME TO CONTACT' is overlaid on the right side of the task list, showing suggested contact times for various tasks.

DUE DATE	SUBJECT	PRIORITY	STATUS	RELATED TO	LEAD/CONTACT
10/10/2024	New Product Pitch	High	Not Started	60 widgets	Jon Cheng
10/10/2024	POC Discussion	High	Not Started	Chat bar widgets	Jerry Foreman
10/10/2024	Follow up Call	High	Not Started	Venture Capitalists	Melinda Anderson
10/10/2024	Product Demo	High	Not Started	50 widgets for Acme	Frank Fernandez
10/10/2024	2nd Follow up	High	Not Started	Deal for 100k	Willy Langer
10/10/2024	Meeting	High	Not Started	10 machine widgets	Kara Downey
10/10/2024	Send Letter	High	Not Started	20 Flat Iron widgets	William John
10/10/2024	Email	High	Not Started	Smith & Smith Associates	Greene Smith
10/10/2024	Price Discussion	High	Not Started	60 widgets for Acme	Matthew Morgan
10/10/2024	Follow up Call - Quote Sent	High	Not Started	15 Archive widgets	Shane Clark

BEST TIME TO CONTACT

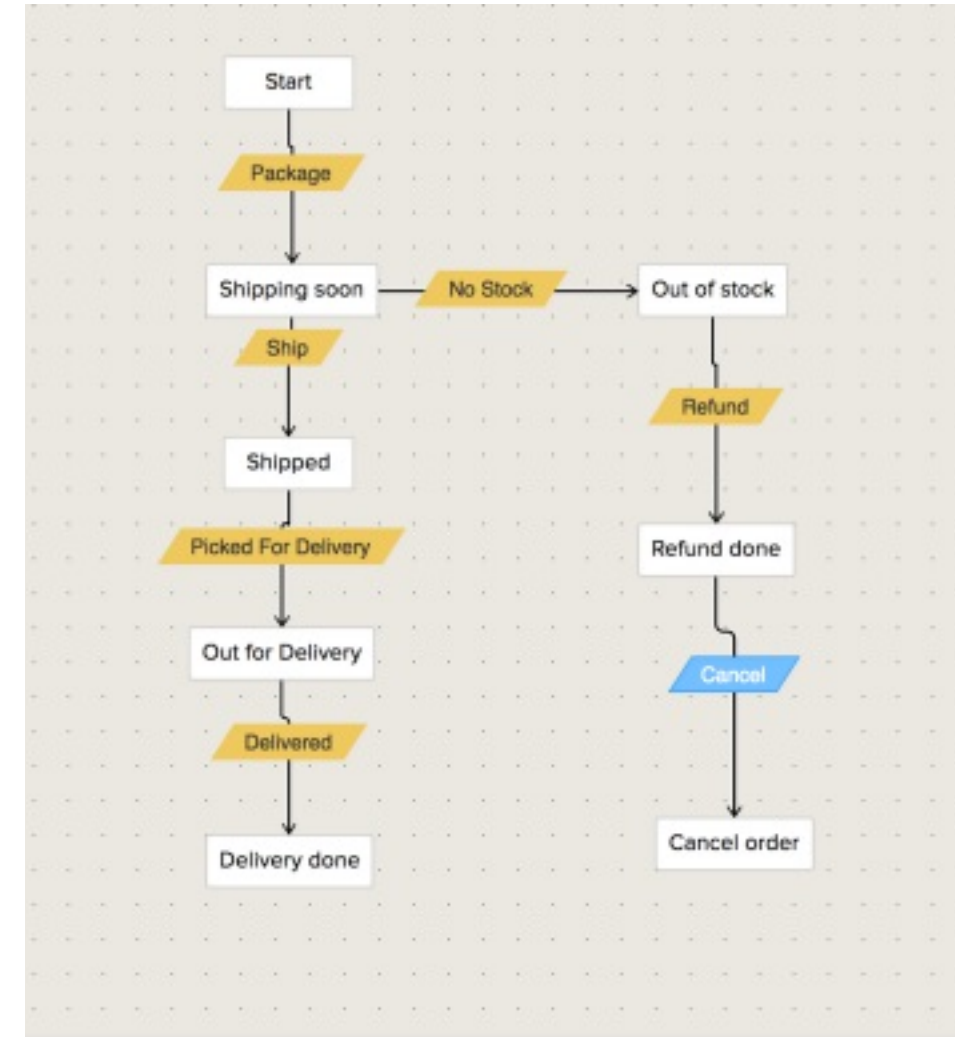
10:00 AM	11:00 AM	
11:00 AM		
10:30 AM	12:00 PM	
9:00 AM	11:20 AM	
10:30 AM		
11:30 AM	12:30 PM	4:30 PM
1:00 PM	3:30 PM	
11:00 AM		
10:30 AM	11:15 AM	
11:00 AM		

Streamline your follow ups with Blueprint

Process automation for the masses:
Build. Sell. Repeat.

Define & control processes from
beginning to end.

Easy-to-use visual process builder.

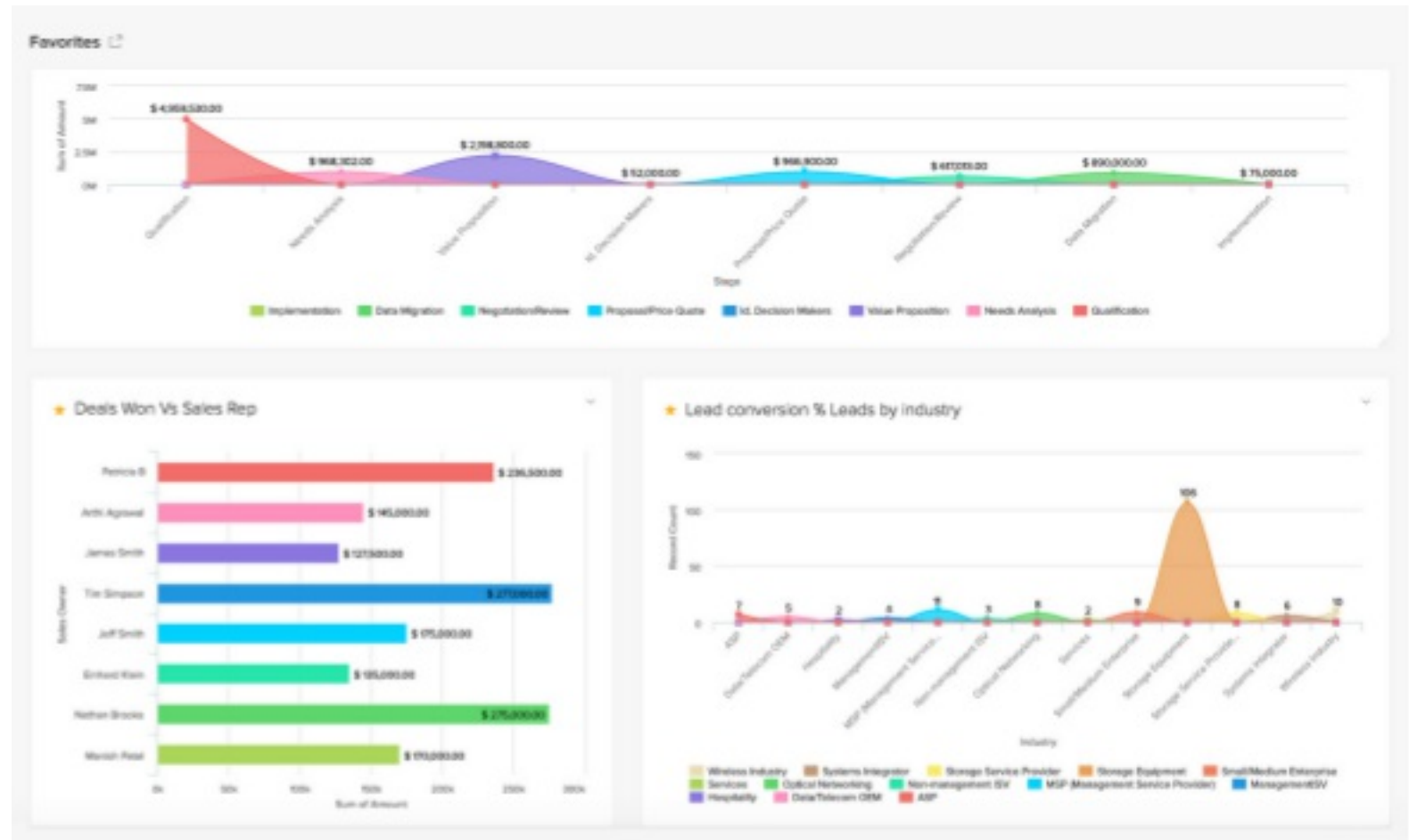


Analyze your sales performance

Reports

Dashboards

Trend Analysis (Zia)



Is your **CRM in tune with your business?**



Tailor your CRM to your needs with



Custom Fields

Email Templates

Custom Modules

Custom Related lists

Page Layouts

Custom Buttons



Data Security

Zoho CRM Security features:

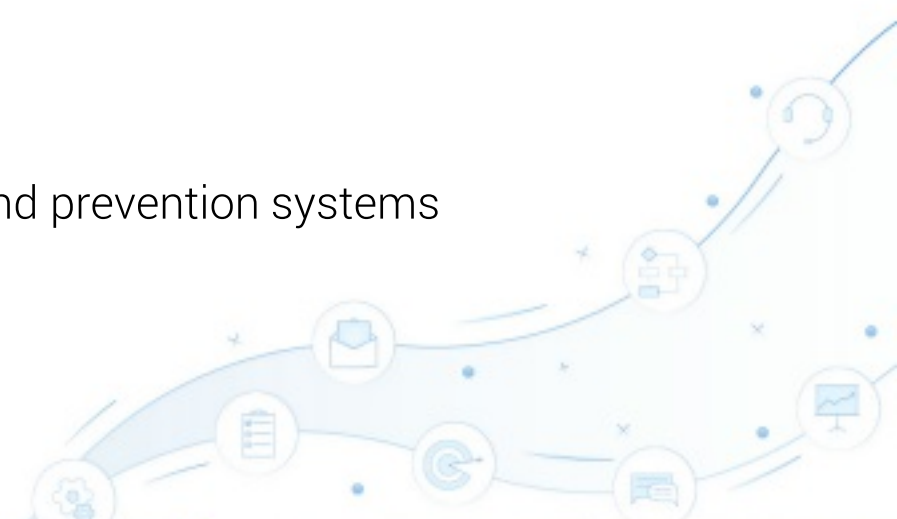
- Role-based permissions
- Profile and field level access
- Audit logs
- IP restrictions
- Application-level security
- Password policies
- Data protection & backup
- Two-factor authentication
- Complies with SafeHarbor
- SOC 2 Certified

Zoho Data Center Security:

- 7x24x365 security
- Video monitoring
- Biometric & two-factor authentication for entry
- Bullet-resistant walls
- Data encryption
- Data Centers in US and EU

Zoho's Network Security:

- Firewalls
- Intrusion detection and prevention systems
- Anti-virus systems
- Anti-spam systems



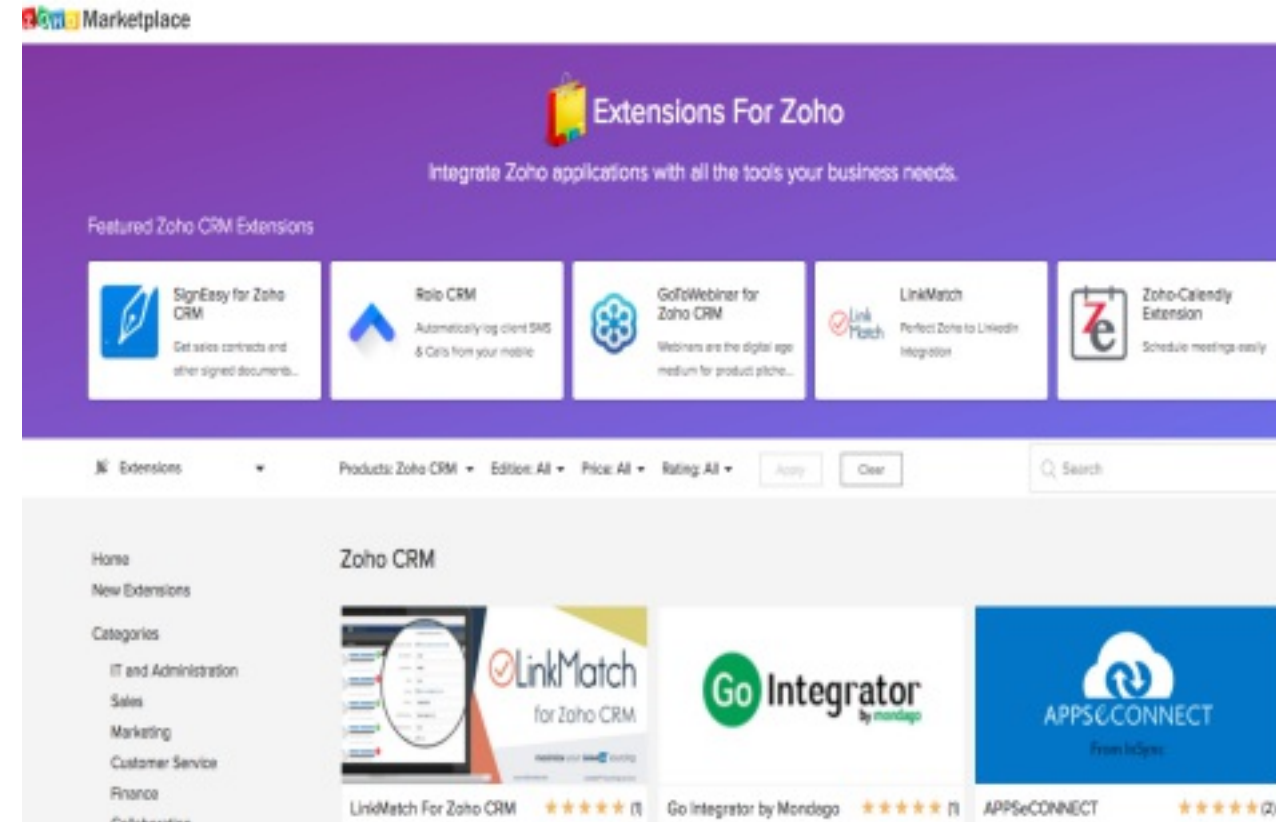
Extend using Marketplace

Integrate Zoho CRM with other apps like

- Mailchimp
- Zendesk
- Box
- Slack
- Microsoft 365
- Google Apps

Visit here to know more:

<https://marketplace.zoho.com/>



The screenshot displays the Zoho Marketplace interface. At the top, it says "Marketplace" and "Extensions For Zoho". Below this, it states "Integrate Zoho applications with all the tools your business needs." A section titled "Featured Zoho CRM Extensions" shows five featured apps: SignEasy for Zoho CRM, Role CRM, GoToWebinar for Zoho CRM, LinkMatch, and Zoho-Calendarly Extension. Below this, there are filters for "Extensions", "Products: Zoho CRM", "Edition: All", "Price: All", and "Rating: All". A search bar is also present. The main content area shows a list of extensions under the heading "Zoho CRM", including LinkMatch For Zoho CRM, Go Integrator by Mondago, and APPSeCONNECT. Each extension card includes a star rating and a small number of reviews.

Developer and API

- Catalyst
- REST API
- Widgets
- Developer Edition
- Serverless code
- Web SDK's
- Mobile SDK's
- White Labeled Solutions





#ZohoCRM2018

WHAT'S NEW?

This release includes:

- Artificial Intelligence
- Customization
- Enterprise Features



Zia is now smarter

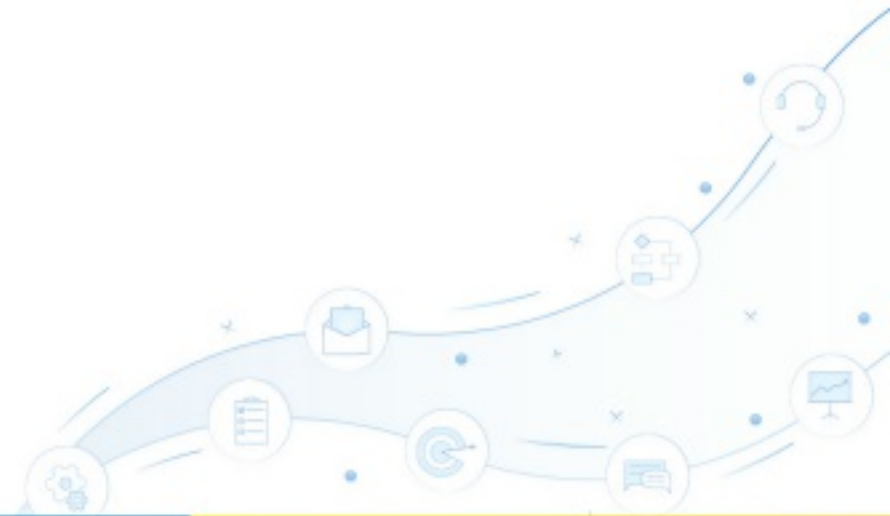
- Conversion Prediction (Lead/Deal prediction)
- Best time to contact reminder
- Zia Voice
- Analytics (renaming Dashboards)
- Workflow analysis
- Email sentiment
- Data Enrichment



Zia Voice

How does this work:

- Basic CRM information is directly accessed by Zia.
- For advanced business cases, create intents, map variables to those intents, create code in Deluge that does the requested action and then format the response.
- Add new notes or update record status.



Conversion prediction

Based on your lead or deal attributes and activities along with your win history, Zia predicts the probability of closure on a scale of 0 to 100.

Closing This Month ▾

FILTER LEADS BY

- Predictions
 - Likely to win ▾
 - Records to focus
 - Prediction Score
- Email Sentiment
- Activities
- Email Status
- Notes
- Lead Name
- Company
- Phone
- Email
- Ad
- Ad Campaign Name
- Ad Click Date
- Ad Network

> ▾ 80

	DEAL NAME	AMOUNT	CLOSING DATE	PREDICTION
<input type="checkbox"/>	100 Custom Widget deals	\$ 3,000,000.00	Feb 10, 2018	80
<input type="checkbox"/> <input checked="" type="checkbox"/> FEB 1	Grant Industries Ltd-	\$ 2,000,000.00	Feb 15, 2018	85
<input type="checkbox"/>	Avalon Chems Deal	\$ 45,000.00	Feb 3, 2018	80
<input type="checkbox"/>	55 Widgets	\$ 55,000.00	Feb 22, 2018	75
<input type="checkbox"/> <input checked="" type="checkbox"/> FEB 1	85 Widgets	\$ 55,000.00	Feb 22, 2018	70
<input type="checkbox"/>	70 Widgets	\$ 55,000.00	Feb 22, 2018	70
<input type="checkbox"/>	King	\$ 60,000.00	Feb 1, 2018	85
<input type="checkbox"/> <input checked="" type="checkbox"/> JAN 31	Morlong Associates	\$ 35,000.00	Feb 1, 2018	65

Total Count: 10

Email sentiment

Zia can analyze or detect sentiment of each email as positive, negative or neutral. (English only right now)

The screenshot displays an email client interface. On the left, a sidebar titled "CONTACTS & LEADS" lists several contacts with their names, dates, and subject lines. The contact "Maria Thomas" is highlighted. On the right, the email content is shown, including the sender's name, email address, and the body text of the message.

CONTACTS & LEADS

- **Jeremy watson** 10.40 AM
Request for sample logo design
- **Maria Thomas** Yesterday
Joy, this is something I need...
- **Steve Johnson** Jul 6
Reg: Price Plans
- **Sandra Evans** Jul 1
Clarification in pricing
- **Warren Hastings** Jun 25
Demo request
- **James Carter** May 22
Need business cards design...

marlathoms@gmail.com
To : amelia.burrows@zyker.com Yesterday

Maria Thomas

Joy, this is something I need to escalate with Usman. I'm sure they were the ones who created the agent's Gmail accounts.

There were some severe issues in sending out emails this morning.

Please advise,
Maria Thomas

Reminder for the best time to contact

My Today + Overdue Tasks ▾		Let Zia remind you				
SEP 26	149	demo	Not Started	High		Kris Marrier
SEP 16	160	Register for upcoming CRM Webinars	Not Started	Low	King	Kris Marrier
SEP 13	162	Competitor Comparison Document	Not Started	Highest	Feltz Printing Service	Capla Paprocki
SEP 14	161	Get Apporval from Manager	Not Started	Low	Chapman	Simona Morasca
SEP 16	159	Get Approval from Manager	In Progress	Normal	Commercial Press	Leota Dilliard
SEP 16	159	Get Apporval from Manager	In Progress	High	King	Kris Marrier
SEP 18	157	Register for upcoming CRM Webinars	In Progress	Normal	Cheryl Haroldson	
SEP 17	158	Refer CRM Videos	In Progress	High	Truhlar And Truhlar Attys	Sage Wieser
SEP 16	159	Customize CRM to your needs	In Progress	Normal	Benton	John Butt
SEP 17	158	Complete CRM Getting Started steps	In Progress	High	Printing Dimensions	Donette Foller

20 Records Per Page ▾

New in Customization

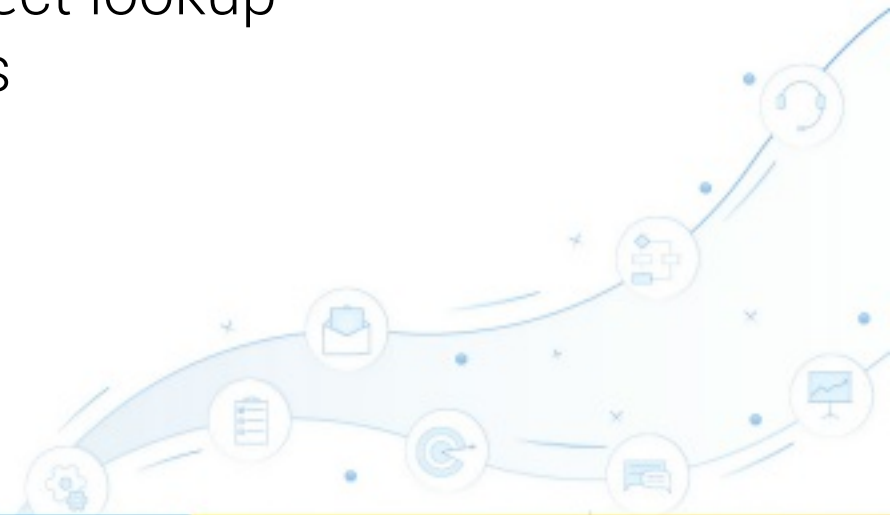
Validation rules

Canvas

Subforms

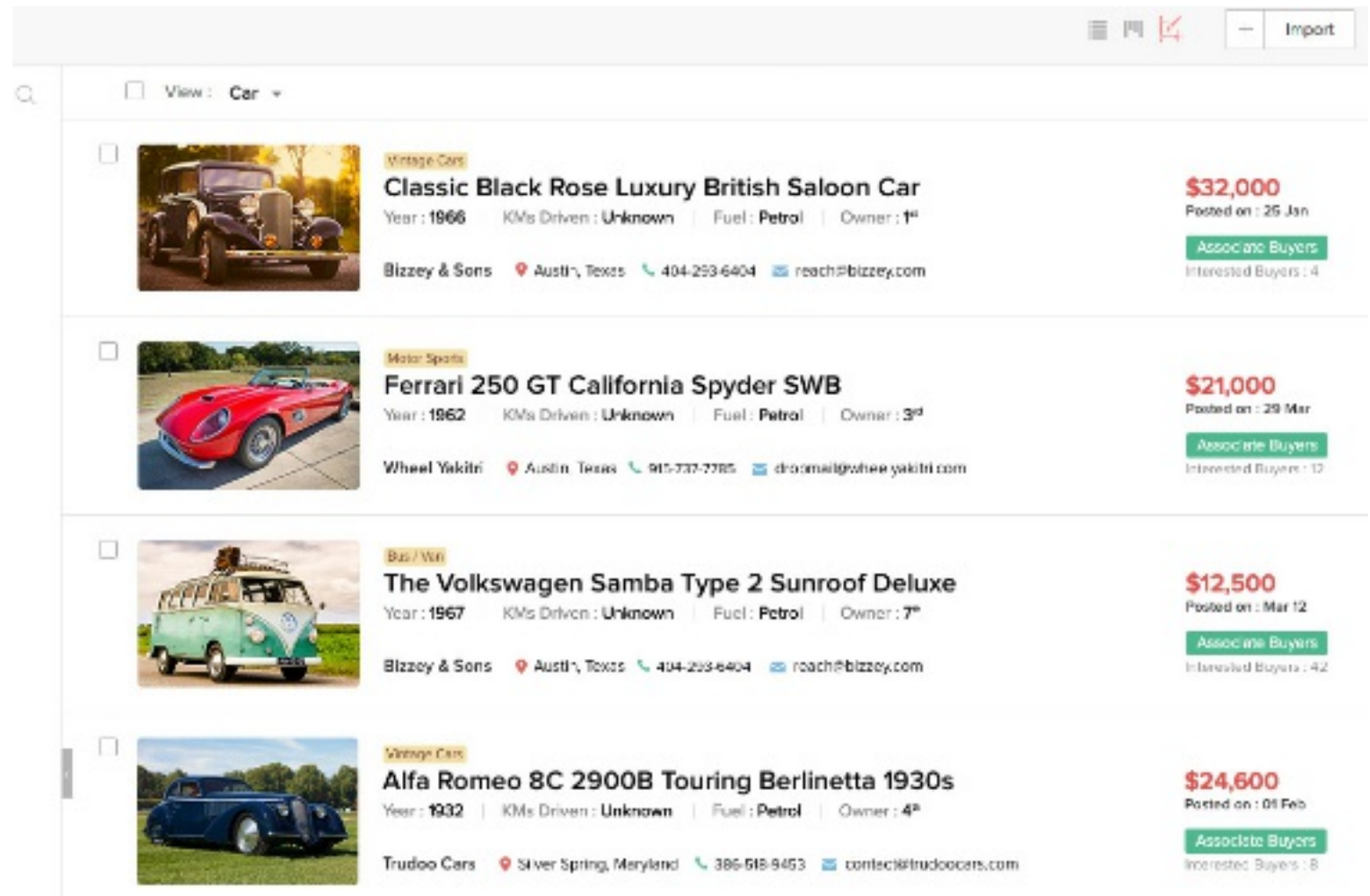
Business hours

Multiselect lookup
fields



Canvas

Add images for easy identification, use custom buttons or include fields of your choice, and get your view completely customized.



The screenshot shows a web interface for a marketplace. At the top right, there are navigation icons and an 'Import' button. Below the navigation is a search bar and a 'View: Car' dropdown menu. The main content area displays four car listings, each with a thumbnail image, a category tag, a title, a price, a 'Posted on' date, and a 'Associate Buyers' button. The listings are:

- Classic Black Rose Luxury British Saloon Car** (Vintage Cars): Year: 1966, KM's Driven: Unknown, Fuel: Petrol, Owner: 1st. Price: \$32,000. Posted on: 25 Jan. Interested Buyers: 4.
- Ferrari 250 GT California Spyder SWB** (Motor Sports): Year: 1962, KM's Driven: Unknown, Fuel: Petrol, Owner: 3rd. Price: \$21,000. Posted on: 29 Mar. Interested Buyers: 12.
- The Volkswagen Samba Type 2 Sunroof Deluxe** (Bus / Van): Year: 1967, KM's Driven: Unknown, Fuel: Petrol, Owner: 7th. Price: \$12,500. Posted on: Mar 12. Interested Buyers: 42.
- Alfa Romeo 8C 2900B Touring Berlinetta 1930s** (Vintage Cars): Year: 1932, KM's Driven: Unknown, Fuel: Petrol, Owner: 4th. Price: \$24,600. Posted on: 01 Feb. Interested Buyers: 8.

Other features and enhancements

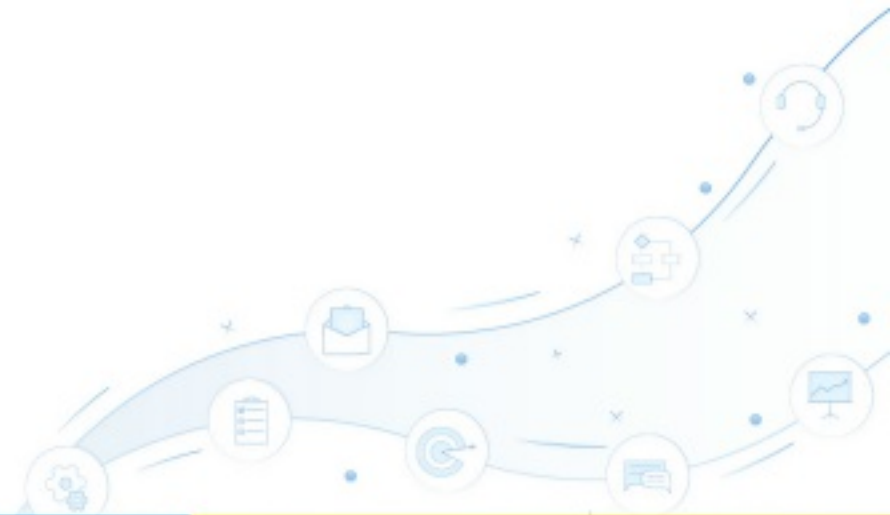
Reporting to hierarchy

Data encryption (EAR)

Interlinking (multi-lookup fields)

Sandbox 2.0

Record level sharing

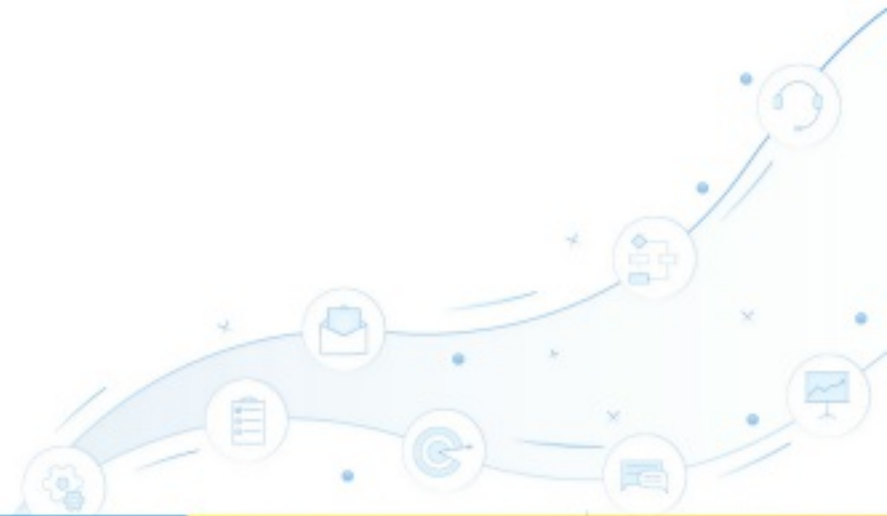


Enterprise Essentials

Portals

Translations

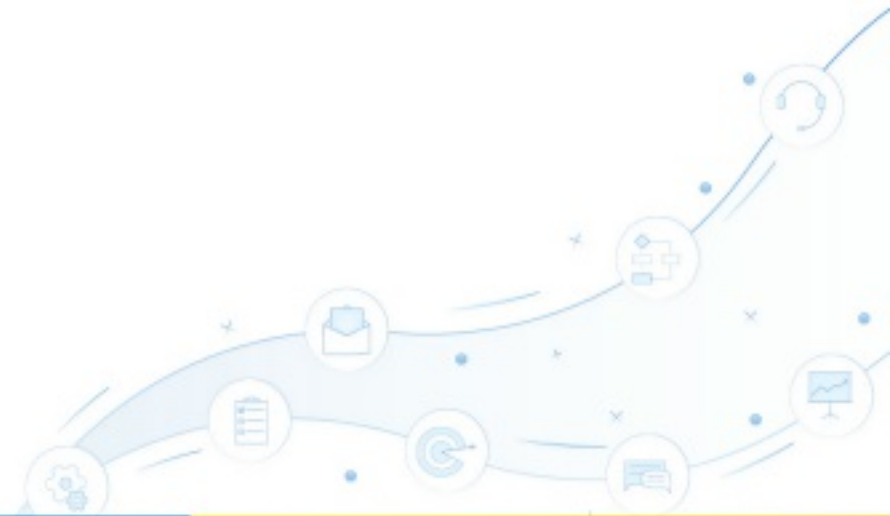
Blueprint 2.0



Portals

Examples:

- Job Card for an auto-garage CRM
- Placing Food order
- Students portal for Universities



Setup

General

Users and Control

Channels

Email

Telephony

Social

Chat

SalesSignals

Portals

Customization

Automation

Data Administration

Marketplace

Developer Space

Portals

Help

User type > Portal Tab Configuration > Field Permissions

Portal Tab Configuration

Choose the module for which the **Customers** portal user type is being created.

Related Modules

Select the modules and their respective layout and permission that are associated with **Contacts**. **Customers** portal user type will have access to only these modules as tabs in the portal.

Tabs	Layouts	Permissions
<input checked="" type="checkbox"/> Contacts	Standard ▾	Create, Edit, View ▾
<input checked="" type="checkbox"/> Deals	Standard ▾	Create, Edit, View ▾
<input checked="" type="checkbox"/> Cases	Standard ▾	Create, Edit, View ▾
<input checked="" type="checkbox"/> Quotes	Standard ▾	View ▾
<input checked="" type="checkbox"/> Sales Orders	Standard ▾	View ▾
<input checked="" type="checkbox"/> Purchase Orders	Standard ▾	View ▾
<input checked="" type="checkbox"/> Invoices	Standard ▾	View ▾
<input type="checkbox"/> Products	Select Layout ▾	View ▾
<input checked="" type="checkbox"/> Notes	Standard ▾	Create Attachments, Delete Attachments, Create, Edit ▾

Next Back

Translations

Export required file, translate it to a specific language, reimport the file to CRM to reflect translation changes.

Translation Settings














[Help](#)

Translations allows you to translate field names and picklist values between 24 languages within Zoho CRM. Export the language files you wish to translate. Import them back after the translation.

Add Language

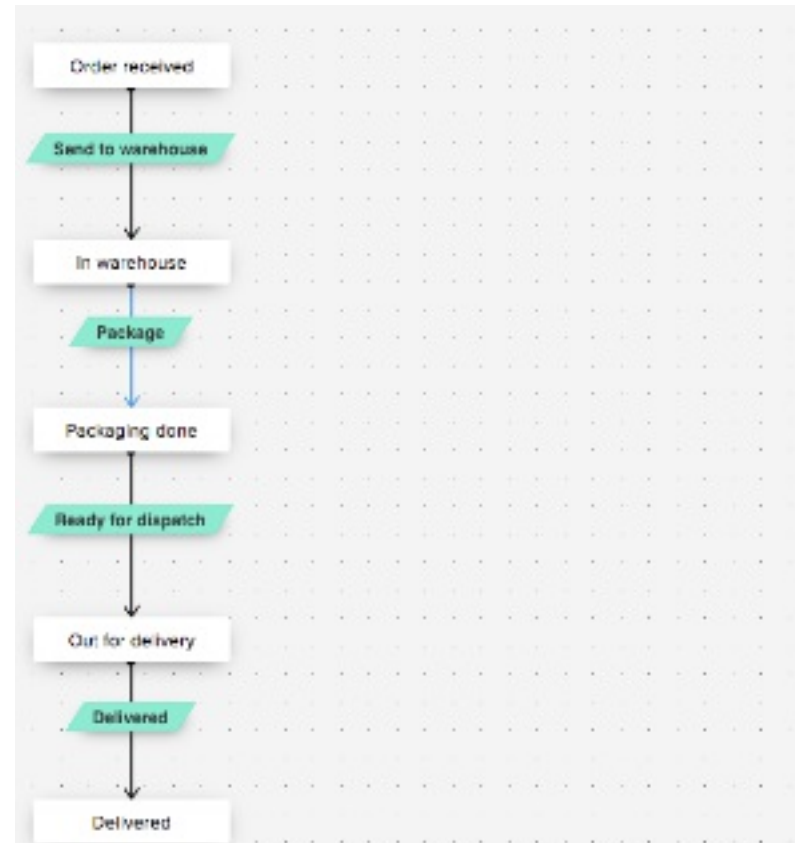
Import

Export All

LANGUAGE NAME	LANGUAGE CODE	LAST TRANSLATED	STATUS	EXPORT
English (United States)	en_US	 12/02/2018 07:40 PM	<input type="checkbox"/>	Export 
French	fr_FR	 10/02/2018 02:04 AM	<input checked="" type="checkbox"/>	Export 
German	de_DE	 12/02/2018 07:35 PM	<input checked="" type="checkbox"/>	Export 
Japanese	ja_JP	 12/02/2018 07:38 PM	<input checked="" type="checkbox"/>	Export 
Bulgarian	bg_BG		Yet to Translate	Export 
Spanish	es_ES	 12/02/2018 07:42 PM	<input checked="" type="checkbox"/>	Export 
Chinese(China)	zh_CN	 12/02/2018 07:44 PM	<input checked="" type="checkbox"/>	Export 

Blueprint enhancements

- Multiple Common Transitions
- Creating related items - During
- Checklist
- SLA
- Parent field update - During



Info and States **State**

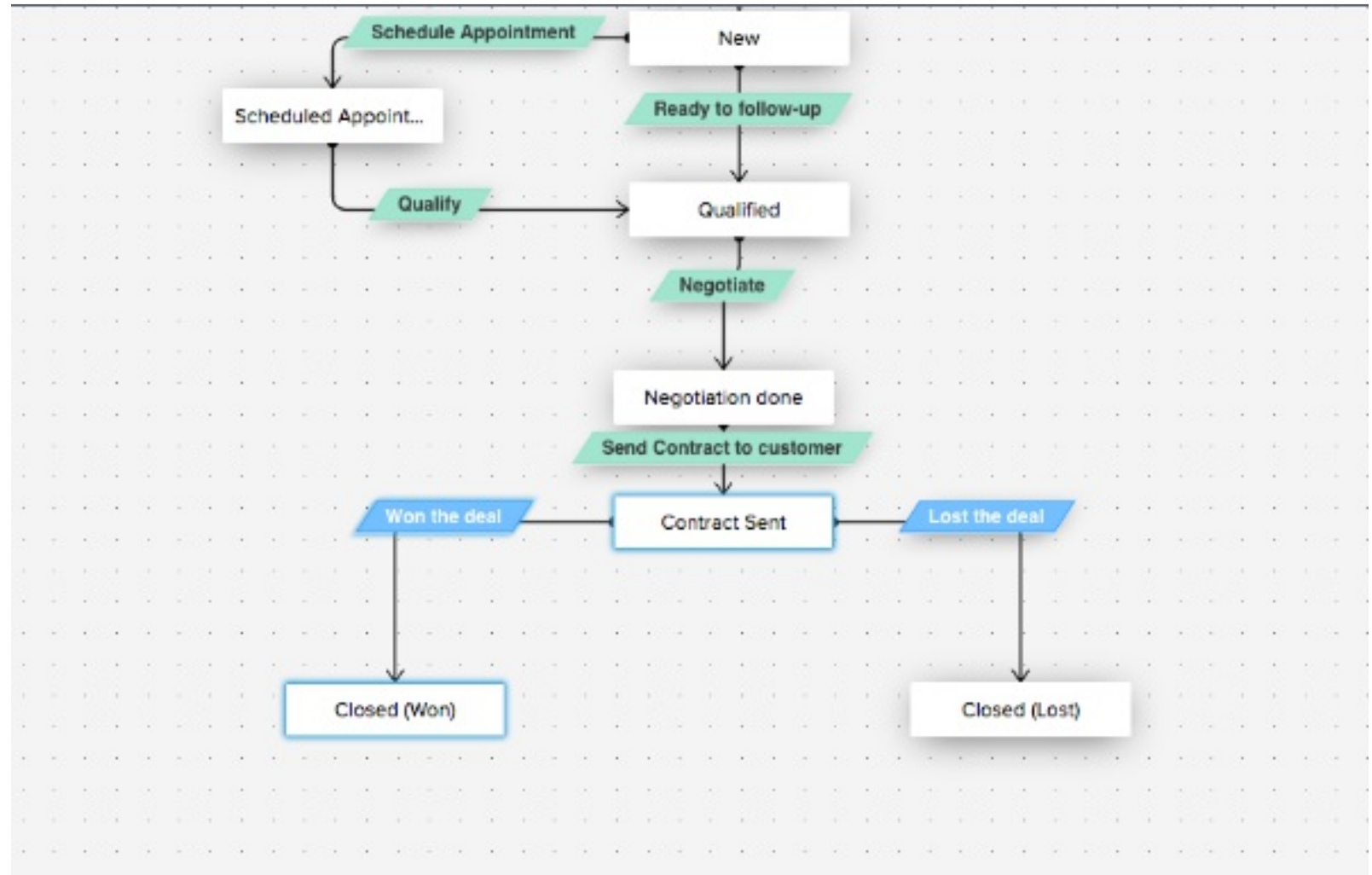
Order received [Clear All](#)

Set maximum time until when a record can be in *Order received* state

When exceeding the set time limit, choose who should be notified and when.

[+ Escalation alert](#)

Blueprint: Multiple Transitions



Blueprint:

Related Items Creation - During Transition

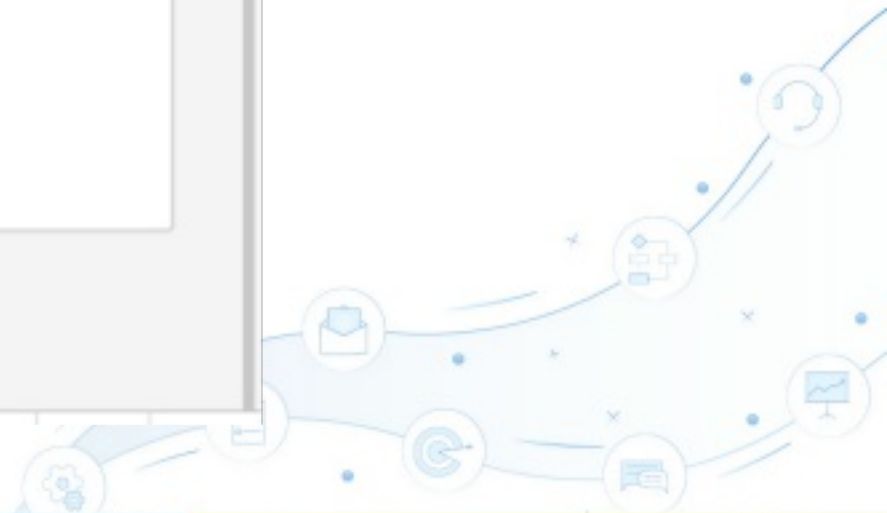
The image shows a software interface for creating a quotation. A dropdown menu is open, showing three options: 'Field', 'Message', and 'Associated Items'. The 'Associated Items' option is selected. The background shows a 'Send Quotation' form with the following details:

- Subject: SO-101-12102017
- Account Name: CERN Tech Inc.
- Buttons: Cancel, Save

The form also includes a section for 'Add Line Items' and a breadcrumb trail: 'Notes, Attachments & Fields' > 'SalesOrders'.

Blueprint: Check List

BEFORE	DURING	AFTER
INSERT MESSAGE AND FIELDS:		
<input type="checkbox"/> Make Notes as mandatory		↑ ↓
<input type="checkbox"/> Make Attachment as mandatory		↑ ↓
Checklist for the day: Make sure you cross out all the items before EOD.		↑ ↓
☰ Setup appointment with Zillium —		↑ ↓
☰ Schedule training with Cx —		
☰ Follow up 2nd call with James —		
Partner training @ 12:45 PM IST +		
+ ADD		



Blue Print: SLA

Info and States

State



Negotiation

Set cap limit until which a record can reside
in *Negotiation*

Day(s) ▼

Escalate **Before 2 days** to **Senior Manager & Walter J**

Escalate **On 3rd day** to **VP Sales**

Escalate **After 2 days** to **CFO & CEO**

Blueprint:

Cross Module Support

Info and States **Transitions**

Start

+ Description

Common Transition

BEFORE **DURING** AFTER

INSERT MESSAGE AND FIELDS:

Make Notes as mandatory ↑ ↓

Make Attachment as mandatory ↑ ↓

Accounts-Account Type + Validation ↑ ↓

+ ADD

Field Message Associated Items

Accounts - --None-- -

- ✓ --None--
- Rating
- Account Name
- Phone
- Fax
- Website
- Ticker Symbol

Negotiate

Notes, Attachments & Fields

Account Name_Account Type Partner ▾

Account Name_Rating --None-- ▾

- ✓ --None--
- Acquired
- Active
- Market Failed
- Project Cancelled
- ShutDown

Cancel Save

TRANSITIONS

Negotiate



All set?

Sit back. Relax. Analyze and Act.

THANK YOU



Schweiz

agentur BLAUOHR GmbH
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