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PART I

SALES FORCE AUTOMATION

In This Section:

- Sales Force Automation in ZCRM
- Lead Management
- Account Management
- Contact Management
- Opportunity Management
- Sales Forecast
In This Section:

- Introduction to Sales Force Automation
Sales Force Automation

The following workflow briefly explains the sales procedure in Zoho CRM.
Zoho CRM provides the sales force, executives, and management with sophisticated sales management functions such as: lead generation & qualification, sales pipeline analysis, sales stage & probability analysis; competitor analysis; real-time sales forecasting and other useful metrics. These functions give business an opportunity to completely focus on customer life-cycle (lead generation - acquisition - conversion - retention - loyalty), thus increasing sales revenue.

Zoho CRM has sales force automation modules such as: Leads, Accounts, Contacts, Potentials, and Sales Forecasting. You can accurately track all business opportunities and close more deals in less amount of time. In addition, you can identify bottlenecks in the sales process in advance and thereby effectively utilize existing customer data for future cross-selling and up-selling opportunities.

Salesforce Automation in Zoho CRM

<table>
<thead>
<tr>
<th>Lead Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leads are raw details about individuals or representatives of organizations collected from trade shows, seminars, advertisements and other marketing campaigns.</td>
</tr>
<tr>
<td>Create Leads</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Account Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounts are companies or departments within the companies with which you plan or have business dealings.</td>
</tr>
<tr>
<td>Create Accounts</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Contact Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contacts are people in an organization with whom you communicate in pursuit of a business opportunity.</td>
</tr>
<tr>
<td>Create Contacts</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Potential Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>Potentials are the business deals with organizations or people that generate real revenue for your organization.</td>
</tr>
<tr>
<td>Create Potentials</td>
</tr>
</tbody>
</table>
**Forecast Management**
Forecasts are factual insight for tracking and fine-tuning the sales process in your organization.

- Create Forecasts
- Associate Forecasts
- Set Fiscal Year

---

**Lead Management**

Leads are raw details about individuals or representatives of organizations collected from trade shows, seminars, advertisements and other marketing campaigns. With the Leads module, you can:

- Manage leads end-to-end (from creating leads to converting them into opportunities)
- Capture leads directly from your Web site using Web-to-lead form
- Import leads collected from trade shows, seminars, direct mail, and other types of campaigns
- Set up lead assignment rules to automatically assign leads to the sales force executives in your organization
- Qualify leads to the next stage based on the information captured in lead details. Once leads are qualified for prospecting stage, convert them into sales opportunities, accounts, and contacts with a single click
- Customize lead management process (B2B and B2C business scenarios) as per the organization's sales process
- Standard reports and dashboards bundled for a fast learning curve. You can create fully customizable lead reports and dashboards.
- Export leads data for further analysis

**Account Management**

Accounts are companies or departments within the companies with which you plan or have business dealings. With the Accounts module, you can:

- Track all accounts and related contacts, opportunities, cases, and other details from a common repository
- Specify parent-child relationships between accounts and their subsidiaries or other divisions
- Generate quotes, sales orders, and invoices for the accounts
• Track purchase history of the customers and analyze opportunities for up-selling and cross-selling opportunities in future
• Identify referrals from accounts and contacts for promoting new products and services
• Store account and contact-related notes and documents in the account history
• Export accounts to analyze the buying patterns of a customers and set up loyalty programs

**Contact Management**

Contacts are people in an organization with whom you communicate in pursuit of a business opportunity. With the Contacts module, you can:

• Track all contacts and related opportunities, cases, activities, and other details from a common repository
• Create the hierarchy of contacts within a company to have a better coordination while dealing with customers
• Import contacts from external sources, CRM and other business applications
• Export contacts for further analysis
• Synchronize contacts in the Zoho CRM using the Zoho CRM Plug-in for Microsoft Outlook

**Opportunity Management**

Potentials are the business deals with organizations or people that generate real revenue for your organization. With the Potentials module, you can:

• Track all sales opportunities end-to-end in a sales cycle
• Import Potentials from other Business/CRM solutions and services
• Associate opportunities with accounts, contacts, activities, and other modules to have a better visibility on the opportunities (360 degree view)
• Track competition on each business opportunity
• Analyze the sales stage and probability of winning deals
• Intuitive Sales Funnel chart to analyze the pipeline and eliminate any bottlenecks in the sales cycle
• Alert the intended audience in your organization when a big deal closes (big deal alert) or is nearing completion
• Set up sales escalation process through Workflow rules
• Generate quotes, sales orders, and invoices from the potentials
• Export opportunities to analyze the sales pipeline

Sales Forecast
Forecasts are factual insight for tracking and fine-tuning the sales process in your organization. With the Forecasts module, you can:

• Estimate how much revenue you can generate in each fiscal quarter/year
• Identify the sales persons who met their targets for fiscal quarter/year
• Predict the revenue generation for the forthcoming quarters
• Create fully customizable forecast reports and dashboards
CHAPTER 2

LEAD MANAGEMENT

In This Section:

- Create Leads
- Approve Leads
- Associate to Other Records
- Assignment Rule
Leads are the details gathered about an individual or representatives of an organization. They play a very important role in an organization's Sales & Marketing department and are useful in identifying potential customers. Collecting leads and managing them are the initial stages in the sales process. Leads can be obtained through trade shows, seminars, advertisements, marketing campaigns etc. Once the leads are collected, it is essential to manage them and follow them up till the leads qualify to prospective customers. The sales department's approach in managing leads can significantly impact the success of an organization.

The terminology related to lead management may differ across industries, but the basic process remains the same. The Leads module in Zoho CRM helps you manage your leads. In Zoho CRM, lead details contain a combination of company (account), person (contact), and business opportunity (potential), depending on your CRM requirement - for managing Business to Business (B2B) industry or Business to Consumer (B2C) industry.

### Availability

<table>
<thead>
<tr>
<th>Editions</th>
<th>Enterprise</th>
<th>Professional</th>
<th>Free</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
</tr>
</tbody>
</table>

**Permission Required**

Leads Tab

### Lead Management Process

- Customize Leads module in lead page according to your organization's Sales & Marketing processes. (You may use the existing fields, disable some of the standard fields, or add new custom fields.)
- Setup lead generation process by filling the lead form, importing lead data from external sources, or capturing leads directly from your Web site using web-to-lead forms.
- Assign leads to the correct sales persons using the Lead Assignment rules.
- Follow-up with the lead till it reaches a certain stage then convert the lead to potential. While converting leads to potentials, accounts and contacts are created automatically.
- Follow up the leads further in the Potentials module, till the deal is either won or lost.
Every person who signs up with Zoho CRM becomes a lead and probably a prospective customer.

Once a lead is generated, the Zoho CRM system automatically assigns the particular lead to a sales person, provided the Lead Assignment Rules are defined.

The sales person performs the validation (or background check) of the lead and analyzes the opportunities that are available. The leads are then filtered based on these opportunities.

If the opportunities are positive, the lead becomes a potential or a possible customer ("Prospect").

A Potential becomes a Customer once the deal is finalized.

Note:

- Standard fields in the Leads module are applicable to most of the industries.
- You can add your organization-specific fields by customizing the leads module.
- In Zoho CRM, a lead is a combination of company as well as the person's contact information.

Create Leads

In Zoho CRM, you can create leads by:

- Entering data in lead details form (manually)
• Importing leads from external sources
• Capturing leads from Web site through Web-to-Lead form

Create Leads Individually

You can create leads manually by entering the details in the lead page. For instance: While traveling you met a person who showed some interest in your product/service. You exchanged business card and assured that you would contact him again with more details about the product/service. The next day, you create a lead manually with the available details and contact the person. In such cases, it is easy to manually feed in the available details and create new lead records instantly.

You can create leads individually by:

• Filling details in the lead creation form.
• Using Quick Create option; a quick create component present in the left pane of the Leads Home page.
• Duplicating the lead with few changes in the existing lead details.

Notes:

• By default, the person who creates the lead owns it.
• To change owner, click the Change link in the Lead Owner field from the Lead Details page and select another user.

To create leads individually

1. In the Leads module, click New Lead.
2. In the Create Lead page, enter the lead details.
3. Click Save.

To create leads instantly

1. Click the Leads tab.
2. On the left pane of the Home page, select Leads from the Quick Create list.
3. In the pop up window, enter the relevant details.
4. Click Save.

To create duplicate leads

1. In the Leads tab, click a particular lead that is to be duplicated.
2. In the Lead Details page, click Clone.
3. In the Clone Lead page, modify the required details.
4. Click Save.

Note: You can also Import Leads and also capture Leads from website using Web-to-Lead form.

Approve Leads Captured through Website

By default, leads captured through Website are assigned to one of the Lead Administrator who can update the leads with additional information and assign it to the corresponding sales person in your organization. It will allow your sales persons to focus mainly on high priority leads (lead that contain correct contact information, and interest on your offering).

Availability

<table>
<thead>
<tr>
<th>Editions</th>
<th>Enterprise</th>
<th>Professional</th>
<th>Free</th>
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<tbody>
<tr>
<td></td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Permission Required</th>
<th>Approve Web-to-Leads</th>
</tr>
</thead>
</table>
To approve leads from Website

1. Click the Leads tab.
2. In the Leads Home page, under Lead Tools section and click the Approve Leads link.
3. In the Lead Approval page, select the leads for approval.
4. Click Approve.

Associate Leads with Other Records

The next important thing after creating leads is to follow it up with activities, tasks, e-mails and attachments. Hence, you may need to associate leads with other records, until the lead reaches a certain stage where it can be converted to Potential as per your organization's sales process.

To attach documents

This feature enables you to attach documents, spreadsheets and presentations to the leads. You can attach them in the following ways:

- Attach from Desktop
- Attach from Zoho Docs
- Attach from Google Docs

To add products

1. In the Lead Details page, the existing product details, if any, are displayed.
   - Click Product Name, Product Code, Product Active, Manufacturer, Support Start Date, or Support Expiry Date links to sort the display order of the records.
   - Click the relevant Del link to delete the record.
2. Click Add Product.
3. Select the check box(es) corresponding to the product.
   Note, that the products will be available in the list only if you add them using the Products module.
4. Click Add to Lead.

To create tasks or events

1. In the Lead Details page, the existing task or event details, if any, are displayed.
• Click **Subject, Activity Type, Status, Due Date** or **Owner Name** links to sort the display order of the records.

• Click the relevant **Edit, Del, or Close** link to modify, delete, or close the task respectively.

2. Click **New Task/New Event** and specify the relevant details.

**Note:** Once the activity is over, you can close the activity using the **Close** link.

**To send e-mails**

1. In the **Lead Details** page, the existing e-mail details, if any, are displayed.

   • Click **Sent Or Received, Subject, Date** or **Sent By** links to sort the display order of the records.

   • Click the relevant **Del** link to delete the mail details.

2. Click **Send Mail**.

3. In the **Send Mail** page, compose the e-mail message and send it.

   Make sure that the lead has a valid email address.

**To add notes**

1. In the **Lead Details** page, the existing note details, if any, are displayed.

   • Click **Title, Note Content, Modified Time, Created Time, or Owner Name** links to sort the display order of the records.

   • Click the relevant **Edit or Del** link to modify or delete the notes respectively.

2. Click **New Note** and do the following:

   a. Enter the **Title**. It is mandatory.

   b. The system displays the name of the lead's **Owner**. Click to change the owner's name.

   c. Enter the **Note Content** in the text box.

3. Click **Save**.

**Convert Leads to Other Sales Records**

When the lead status reaches a certain stage, where it can be qualified as a potential (i.e. when there is a chance of further negotiations with the lead), it can be converted into an account, contact, and potential.
Note:
- Once a lead is converted into potential, lead status will be changed to Converted in Leads Home page.
- You can view the list of converted leads by selecting the Converted view mode.
- Once the lead is converted to account, contact and potential, you cannot revert to the original state.

Availability

<table>
<thead>
<tr>
<th>Editions</th>
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</tr>
</thead>
<tbody>
<tr>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td></td>
</tr>
</tbody>
</table>

Permission Required
- Convert Leads

Lead Conversion Rule

While converting a lead to a potential first a new account and contact are created with the relevant lead data, and then a new potential is created. The following table provides descriptions of the various fields converted to account, contact, and potential (optional) during lead conversion:

<table>
<thead>
<tr>
<th>Lead Field</th>
<th>Converted To</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salutation</td>
<td>Contact: Salutation</td>
</tr>
<tr>
<td>First Name</td>
<td>Contact Name</td>
</tr>
<tr>
<td>Last Name</td>
<td>Contact Name</td>
</tr>
<tr>
<td>Company</td>
<td>Account: Name</td>
</tr>
<tr>
<td>Designation</td>
<td>Contact: Title</td>
</tr>
<tr>
<td>Lead Source</td>
<td>Potential: Lead Source</td>
</tr>
<tr>
<td></td>
<td>Contact: Lead Source</td>
</tr>
<tr>
<td>Industry</td>
<td>Account: Industry</td>
</tr>
<tr>
<td>Annual Revenue</td>
<td>Account: Annual Revenue</td>
</tr>
<tr>
<td>Assigned To</td>
<td>Account, Contact, Potential: Assigned To</td>
</tr>
<tr>
<td>Phone</td>
<td>Account: Phone</td>
</tr>
<tr>
<td></td>
<td>Contact: Phone</td>
</tr>
<tr>
<td>Lead Field</td>
<td>Converted To</td>
</tr>
<tr>
<td>--------------</td>
<td>---------------------------------------------------</td>
</tr>
<tr>
<td>Mobile</td>
<td>Contact: Mobile</td>
</tr>
<tr>
<td>Fax</td>
<td>Account: Fax Contact: Fax</td>
</tr>
<tr>
<td>Email</td>
<td>Contact: Email</td>
</tr>
<tr>
<td>Skype ID</td>
<td>Contact: Skype ID</td>
</tr>
<tr>
<td>Web site</td>
<td>Account: Web site</td>
</tr>
<tr>
<td>Lead Status</td>
<td>User should specify the Potential Stage while converting the lead.</td>
</tr>
<tr>
<td>Rating</td>
<td>Potential: Rating</td>
</tr>
<tr>
<td>No of Employees</td>
<td>Account: No. of Employees</td>
</tr>
<tr>
<td>Email Opt Out</td>
<td>Contact: Email Opt Out</td>
</tr>
<tr>
<td>Street</td>
<td>Account: Street Contact: Street</td>
</tr>
<tr>
<td>City</td>
<td>Account: City Contact: City</td>
</tr>
<tr>
<td>State</td>
<td>Account: State Contact: State</td>
</tr>
<tr>
<td>Postal Code</td>
<td>Account: Postal Code Contact: Postal Code</td>
</tr>
<tr>
<td>Country</td>
<td>Account: Country Contact: Country</td>
</tr>
<tr>
<td>Custom Fields</td>
<td>Users can map their own custom field.</td>
</tr>
</tbody>
</table>

**To convert leads to other sales records**

1. Click the **Leads** tab.
2. In the **Leads Home** page, select the lead to be converted.
3. In the **Lead Details** page, click **Convert**.
4. In the **Lead Conversion** page, enter the details:
   a. Click 🔄 to select the **Assigned To** user name.
b. The system displays the Account Name. If the Account Name already exists, you will have an option to select the existing company name or create a new account using the same company name.

c. Enter the Potential Name.

d. Enter the Potential Close Date or select the date from the calendar displayed.

e. Select the Potential Stage from the list.

f. Select the Contact Role from the list.

g. Enter the Amount.

5. Click Save.

**Set up Lead Assignment Rules**

You can setup lead assignment rules based on your organization-wide lead distribution process so that leads created by importing are automatically assigned to the respective sales team members.

**Availability**

<table>
<thead>
<tr>
<th>Editions</th>
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<th>Professional</th>
<th>Free</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enterprise</td>
<td>YES</td>
<td>YES</td>
<td>NO</td>
</tr>
<tr>
<td>Permission Required</td>
<td>Manage Leads Assignment Rules</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Lead assignment rule can be used only for the leads generated through import tool and Web-to-form.

You cannot assign leads to users if you are creating them manually.

To set up lead assignment rules

1. Click the Leads tab.
2. In the Leads Home page, under Lead Tools, click Assignment Rules.
3. In the Lead Assignment Rule page, click Create Rule.
4. In the New Rule page, enter the Rule Name.
5. Click Save.

6. In the Lead Assignment Rule page, click Create Rule Entry.
7. In the Rule Entry page, do the following:
   a. **Specify Criteria**: Select the matching criteria to evaluate the rule.
   b. **Select User**: Select the user to whom the lead has to be assigned.
   c. **Add Task**: Select the workflow task to be assigned.

8. Click **Save**.
   After saving, you can reorder the rule entries (in case there are multiple rule entries) to specify which rule entry needs to be triggered first.

9. In the Lead Assignment Rule page, click **Reorder**.
10. Specify the **Order** numbers of the rule entries and click **Save**.

When the assignment rule is triggered, the rule entries will in turn be triggered based on its order.

**Map Custom Fields**

When a lead is converted into an account, contact and potential, field values of a lead are mapped with the corresponding account, contact, and potential. Only when the fields are accurately mapped with those of the corresponding modules, data will get transferred correctly.

By default, the standard fields are mapped with the corresponding fields of the other modules (Accounts, Contacts, and Potentials). With the lead conversion mapping tool, you can easily map other fields that you create.

**To map lead fields with other modules**

1. Click **Setup > Lead Settings > Fields List**.
2. In the **Lead Fields List** page, click **Map Fields**.
3. In the **Custom Field Mapping** page, custom fields are displayed under Lead Fields column.
4. Select the appropriate options from the corresponding lists to map the fields.
5. Click **Save**.
CHAPTER 3
ACCOUNT MANAGEMENT

In This Section:

- Create Accounts
- Associate to Other Records
CHAPTER 3
ACCOUNT MANAGEMENT

In a typical Business to Business (B2B) scenario, Account represents a Company or a Department within the company, with which your organization is planning to do business in future. An account stores the company address, number of employees, annual revenue, and other details.

You can associate an account with contacts (persons) within the company and the potentials (business opportunities) during pre-sales. After successful completion of the sales, you can also provide Customer Support & Service through Zoho CRM - Case Management.

Availability

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Create Accounts

In Zoho CRM, you can create accounts by:

- Entering data in the account details form
- Duplicating the account with a few changes from the existing account details
- Using Quick Create option, a quick create component present in the left pane of the Accounts Home page
- Importing accounts from other Contact Management and CRM applications
- Synchronizing Microsoft Outlook contacts with Zoho CRM (Special case: An account will be created in Zoho CRM while Company Name field is specified in the Microsoft Outlook)
- Converting leads to accounts

Create Accounts Individually

You can create accounts individually by:

- Filling details in the account creation form.
Using Quick Create option; a quick create component present in the left pane of the Accounts Home page.

- Duplicating the accounts with few changes in the existing account details.

**To create accounts individually**

1. In the *Accounts* module, click **New Account**.
2. In the *Create Account* page, enter the account details.
3. Click **Save**.

**To create accounts instantly**

1. Click the *Accounts* tab.
2. On the left pane of the *Home* page, select Accounts from the **Quick Create** list.
3. In the pop up window, enter the relevant details.
4. Click **Save**.

**To create duplicate accounts**

1. In the *Accounts* tab, click a particular account that is to be duplicated.
2. In the *Account Details* page, click **Clone**.
3. In the *Clone Account* page, modify the required detail.
4. Click **Save**.

**Associate Account with Other Records**

You can create a 360 degrees view of the account to display all the associated details, such as contacts, potentials, trouble tickets, activities, attachments, and notes in a single view.
To attach documents
This feature enables you to attach documents, spreadsheets and presentations to the account. You can attach them in the following ways:

- Attach from Desktop
- Attach from Zoho Docs
- Attach from Google Docs

To create potentials
1. In the Account Details page, the existing potential details, if any, are displayed.
   - Click Potential Name, Amount, Stage, Probability (%), Closing Date, or Type links to sort the display order of the records.
   - Click the relevant Edit or Del link to modify or delete the potentials respectively.
2. Click New.
3. Enter the potential details.
4. Click Save.

To add products
1. In the Account Details page, the existing product details, if any, are displayed.
   - Click Product Name, Product Code, Product Active, Manufacturer, Support Start Date, or Support Expiry Date links to sort the display order of the records.
   - Click the relevant Del link to delete the record.
2. Click New.
3. Select the check box(es) corresponding to the product.
   The products will be available in the list only if you add them using the Products module.
4. Click Add to Account.

To create contacts
1. In the Account Details page, the existing contact details, if any, are displayed.
   - Click Contact Name, Email, Phone, Mobile, or Fax links to sort the display order of the records.
Account Management

- Click the relevant **Edit** or **Del** link to modify or delete the contacts respectively.

2. Click **New**.
3. Enter the contact details.
4. Click **Save**.

**To add notes**

1. In the *Account Details* page, the existing note details, if any, are displayed.

   - Click **Title**, **Note Content**, **Modified Time**, **Created Time**, or **Owner Name** links to sort the display order of the records.
   
   - Click the relevant **Edit** or **Del** link to modify or delete the notes respectively.

2. Click **New Note** and do the following:
   
   a. Enter the **Title**.
   
   b. The system displays the name of the account's **Owner**. Click to change the owner's name.
   
   c. Enter the **Note Content** in the text box.

3. Click **Save**.

**To create tasks or events**

1. In the *Account Details* page, the existing task or event details, if any, are displayed.

   - Click **Subject**, **Activity Type**, **Status**, **Due Date** or **Owner Name** links to sort the display order of the records.
   
   - Click the relevant **Edit**, **Del**, or **Close** link to modify, delete, or close the task respectively.

2. Click **New Task/New Event** and specify the relevant details.

**Note:** Once the activity is over, you can close the activity using the **Close** link.

**To create quotes**

1. In the *Account Details* page, the existing quote details, if any, are displayed.

   - Click **Subject**, **Quote Stage**, **Valid Till** date, or **Carrier** links to sort the display order of the records.

   - Click the relevant **Edit** or **Del** link to modify or delete the quotes respectively.
2. Click New.
3. Enter the relevant details.
4. Click Save.

**To create sales orders**

1. In the *Account Details* page, the existing sales order details, if any, are displayed.
   - Click *Subject, Status, Customer No., Due Date, Excise Date*, or *Sales Commission* links to sort the display order of the records.
   - Click the relevant *Edit* or *Del* link to modify or delete the sales orders respectively.
2. Click New.
3. Enter the sales order details.
4. Click Save.

**To create invoices**

1. In the *Account Details* page, the existing invoice details, if any, are displayed.
   - Click *Subject, Status, Invoice Date, Due Date, Excise Date*, or *Sales Commission* links to sort the display order of the records.
   - Click the relevant *Edit* or *Del* link to modify or delete the invoice respectively.
2. Click New.
3. Enter the invoice details.
4. Click Save.

**To create cases**

1. In the *Account Details* page, the existing case details, if any, are displayed.
   - Click *Subject, Case Reason, Email, Status, Priority*, or case *Type* links to sort the display order of the records.
   - Click the relevant *Edit* or *Del* link to modify or delete the cases respectively.
2. Click New.
3. Enter the case details.
4. Click Save.
Add Member Accounts

Member Accounts are secondary accounts added to an existing parent account. In other words, this allows having separate accounts with different divisions within a parent company, thus providing the scope to view individual accounts as well as the consolidated accounts within the parent account.

**To add member accounts**

1. In the Account Details page, the existing member account details, if any, are displayed.
   
   - Click Account Name, Phone, Website, Account Type, Industry, or Annual Revenue links to sort the display order of the records.
   
   - Click the relevant Edit or Del link to modify or delete the member account respectively.

2. Click New.

3. Enter the member account details.

4. Click Save.
CHAPTER 4

CONTACT MANAGEMENT

In This Section:

- Create Contacts
- Associate to Other Records
- Approve Contacts
- Assignment Rule
Contacts are people with whom you communicate, either in pursuit of a business opportunity or for personal reasons. In Business-to-Consumer (B2C) scenario, contact is the most important information for acquiring customers, whereas in Business-to-Business (B2B) it is a part of the organization details with which you are doing business.

The most important function of contacts module in Zoho CRM is that they can be used for both customers' acquisition as well as procurement of products from the vendors, i.e., contacts can be related to accounts as well as vendors according to your business process.

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**Create Contacts**

In Zoho CRM, you can create contacts by:

- Entering data in contact details form
- Using Quick Create option, a quick create component present in the left pane of the Contacts Home page
- Duplicating the contact with few changes from the existing contact details
- Importing contacts from other Contact Management applications
- Converting leads to contacts
- Synchronizing Microsoft Outlook contacts with Zoho CRM

**Create Contact Individually**

You can create contacts individually by:

- Filling details in the contact creation form.
Using Quick Create option; a quick create component present in the left pane of the Contacts Home page.

- Duplicating the contacts with few changes in the existing contact details.

To create contacts individually

1. In the Contacts module, click New Contact.
2. In the Create Contact page, enter the contact details.
3. Click Save.

Notes:
- By default, the person who creates the contact owns it.
- To change owner, click the Change link in the Contact Owner field from the Contact Details page and select another user.

To create contacts instantly

1. Click the Contacts tab.
2. On the left pane of the Home page, select Contacts from the Quick Create list.
3. In the pop up window, enter the relevant details.
4. Click Save.

To create duplicate contacts

1. In the Contacts tab, click a particular contact that you want to be duplicated
2. In the Contact Details page, click Clone.
3. In the Clone Contact page, modify the required details.
4. Click **Save**.

**Associate Contact with other Records**

You can create a 360-degrees view of the contact to display all the associated details, such as potentials, trouble tickets, open activities, history of the completed activities, attachments, and notes.

**To attach documents**

This feature enables you to attach documents, spreadsheets and presentations to the contact. You can attach them in the following ways:

- Attach from Desktop
- Attach from Zoho Docs
- Attach from Google Docs

**To create potentials**

1. In the **Contact Details** page, the existing potential details, if any, are displayed.
   
   - Click **Potential Name**, **Amount**, **Stage**, **Probability (%)**, **Closing Date**, or **Type** links to sort the display order of the records.
   
   - Click the relevant **Edit** or **Del** link to modify or delete the potentials respectively.

2. Click **New**.
3. Enter the potential details.
4. Click **Save**.

**To add products**

1. In the **Contact Details** page, the existing product details, if any, are displayed
   
   - Click **Product Name**, **Product Code**, **Product Active**, **Manufacturer**, **Support Start Date**, or **Support Expiry Date** links to sort the display order of the records.
   
   - Click the relevant **Del** link to delete the record.

2. Click **New**.
3. Select the check box(es) corresponding to the product.
4. Click **Add to Contact**.
To add notes

1. In the Contact Details page, the existing note details, if any, are displayed.
   - Click Title, Note Content, Modified Time, Created Time, or Owner Name links to sort the display order of the records.
   - Click the relevant Edit or Del link to modify or delete the notes respectively.

2. Click New Note and do the following:
   a. Enter the Title.
   b. The system displays the name of the contact's Owner. Click to change the owner's name.
   c. Enter the Note Content in the text box.

3. Click Save.

To create tasks or events

1. In the Contact Details page, the existing task or event details, if any, are displayed.
   - Click Subject, Activity Type, Status, Due Date or Owner Name links to sort the display order of the records.
   - Click the relevant Edit, Del, or Close link to modify, delete, or close the task respectively.

2. Click New Task/New Event and specify the relevant details.

   Note: Once the activity is over, you can close the activity using the Close link.

To create quotes

1. In the Contact Details page, the existing quote details, if any, are displayed.
   - Click Subject, Quote Stage, Valid Till date, or Carrier links to sort the display order of the records.
   - Click the relevant Edit or Del link to modify or delete the quotes respectively.

2. Click New.

3. Enter the relevant details.

4. Click Save.

To create sales orders

1. In the Contact Details page, the existing sales order details, if any, are displayed.
Click Subject, Status, Customer No., Due Date, Excise Date, or Sales Commission links to sort the display order of the records.

Click the relevant Edit or Del link to modify or delete the sales orders respectively.

2. Click New.
3. Enter the sales order details.
4. Click Save.

To create invoices

1. In the Contact Details page, the existing invoice details, if any, are displayed.

   Click Subject, Status, Invoice Date, Due Date, Excise Date, or Sales Commission links to sort the display order of the records.

   Click the relevant Edit or Del link to modify or delete the invoice respectively.

2. Click New.
3. Enter the invoice details.
4. Click Save.

To create cases

1. In the Contact Details page, the existing case details, if any, are displayed.

   Click Subject, Case Reason, Email, Status, Priority, or case Type links to sort the display order of the records.

   Click the relevant Edit or Del link to modify or delete the cases respectively.

2. Click New.
3. Enter the case details.
4. Click Save.

To create purchase orders

1. In the Contact Details page, the existing purchase order details, if any, are displayed.

   Click Subject, Status, Tracking Number, Due Date, Excise Date, or Sales Commission links to sort the display order of the records.

   Click the relevant Edit or Del link to modify or delete the purchase orders respectively.

2. Click New.
3. Enter the purchase order details.
4. Click **Save**.

**To send e-mails**

1. In the *Contact Details* page, the existing e-mail details, if any, are displayed.
   - Click **Sent Or Received**, **Subject**, **Date** or **Sent By** links to sort the display order of the records.
   - Click the relevant **Del** link to delete the mail details.
2. Click **Send Mail**.
3. In the *Send Mail* page, compose the e-mail message and send it.

   Make sure that the contact has a valid e-mail address.

**Approve Contacts Captured through Website**

By default, contacts captured through Website are assigned to one of the Administrators who can update the data with additional information and assign to the corresponding sales person in your organization.

**Availability**

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**Permission Required**

- Approve Web-to-Contacts

**To approve contacts from Website**

1. Click the **Contacts** tab.
2. In the *Contacts Home* page, under *Contact Tools* section, and click the **Approve Contacts** link.
3. In the *Contact Approval* page, select the contacts for approval.
4. Click **Approve**.
Set up Contact Assignment Rules

You can setup contact assignment rules based on your organization-wide contact distribution (based on sales territories) process so that contacts generated through import tool and web-to-contact form are automatically assigned to the respective sales team members.

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**Contact Assignment Workflow**

- Create contact assignment rule.
- Associate rule entries to the assignment rule
- Select the required assignment rule in contact import tool/web-to-contact form

**Note:**

- While importing, first assignment rule is evaluated and then assigned to the Zoho CRM users according to the matching criteria.

**Limitations**

- You can create up to 20 different contact assignment rules.
- In each assignment rule, you can associate up to 20 different criteria.
- Though you set multiple rules, users can select only one rule at a time.
- Contact assignment rule can be used only for the contacts generated through import tool and Web-to-contact form.
- You cannot assign contacts to users if you are creating manually.

**To set up contact assignment rules**

1. Click the **Contacts** tab.
2. In the **Contacts Home** page, under **Contact Tools** section, select **Assignment Rules**.
3. In the **Contact Assignment Rule** page, click **Create Rule**.
4. In the *New Rule* page, enter the **Rule Name**.

5. Click **Save**.

![New Rule](image)

**Figure 8: New Rule**

6. Click **Create Rule Entry**. The system displays the Rule Entry page.

![Rule Criteria](image)

**Figure 9: Rule Criteria**

7. In the *Rule Entry* page, do the following:

   - **Specify Criteria**: Select the matching criteria to evaluate the rule.
   - **Select User**: Select the user to whom the contact has to be assigned.
- **Add Task**: Select the workflow task to be assigned.

8. Click **Save**.

   After saving, you can reorder the rule entries (in case there are multiple rule entries) to specify which rule entry needs to be triggered first.

9. In the *Contact Assignment Rule* page, click **Reorder**.

![Figure 10: Assignment Rule](image)

   10. Specify the **Order** numbers of the rule entries and click **Save**.

     When the assignment rule is triggered, the rule entries will in turn be triggered based on its order.
In This Section:

- Create Potentials
- Associate to Other Records
- Set up Big Deal Alert
- Map Stage & Probability Values
In any sales organization, potentials are the most important records to generate the real revenue for the organization. In a typical B2B organization all potentials have to undergo a complete sales cycle, which starts with identifying the hot prospect and ends with prospects being won or lost. The activities within this sales cycle that has to be completed are; sending product information to potentials, product demonstrations, sending sales quotations and business negotiations. Precisely, potential provides the following information for the sales management:

- Sales cycle
- The potential sales volume (Product units and price)
- The sales status and the estimated sales probability in each sales stage
- Reasons for the sales status (Won/Lost)
- Competitors of the potential
- Forecast for the next quarter/year sales

### Availability

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### Create Potentials

In Zoho CRM, you can create potentials by:

- Entering data in potential details form
- Importing potentials from other sales force automation applications
- Converting Leads into potentials

### Create Potentials Individually

You can create potentials individually by:
Potential Management

- Filling details in the potential creation form.
- Using Quick Create option; a quick create component present in the left pane of the Potentials Home page
- Duplicating the potential with a few changes from the existing potential details

**To create potentials individually**

1. In the **Potentials** module, click **New Potential**.
2. In the **Create Potential** page, enter the potential details.
3. Click **Save**.

**To create potentials instantly**

1. Click the **Potentials** tab.
2. On the left pane of the **Home** page, select Potentials from the **Quick Create** list.

3. In the pop up window, enter the relevant details.
4. Click **Save**.

**To create duplicate potentials**

1. In the **Potentials** tab, click a particular potential that is to be duplicated.
2. In the **Potential Details** page, click **Clone**.
3. In the **Clone Potential** page, modify the required details.
4. Click **Save**.
Associate Potentials with Other Records

You can create a 360-degrees view of the potential to display all the associated details, such as open activities, history of the completed activities, contacts, products, sales stage history, attachments, and notes.

To attach documents

This feature enables you to attach documents, spreadsheets and presentations to the potentials. You can attach them in the following ways:

- Attach from Desktop
- Attach from Zoho Docs
- Attach from Google Docs

To add products

1. In the Potential Details page, the existing product details, if any, are displayed.
   - Click Product Name, Product Code, Product Active, Manufacturer, Support Start Date, or Support Expiry Date links to sort the display order of the records.
   - Click the relevant Del link to delete the record.
2. Click Add Product.
3. Select the check box(es) corresponding to the product.
   Note, that the products will be available in the list only if you add them using the Products module.
4. Click Add to Potential.

To create tasks or events

1. In the Potential Details page, the existing task or event details, if any, are displayed.
   - Click Subject, Activity Type, Status, Due Date or Owner Name links to sort the display order of the records.
   - Click the relevant Edit, Del, or Close links to modify, delete, or close the task respectively.
2. Click New Task/New Event and specify the relevant details.

Note: Once the activity is over, you can close the activity using the Close link.
To send e-mails

1. In the *Potential Details* page, the existing e-mail details, if any, are displayed.
   
   - Click *Sent Or Received*, *Subject*, *Date* or *Sent By* links to sort the display order of the records.
   - Click the relevant *Del* link to delete the mail details.

2. Click *Send Mail*.

3. In the *Send Mail* page, compose the email message and send it.
   
   Make sure that potential has a valid email address.

To add notes

1. In the *Potential Details* page, the existing note details, if any, are displayed.

   - Click *Title*, *Note Content*, *Modified Time*, *Created Time*, or *Owner Name* links to sort the display order of the records.
   - Click the relevant *Edit* or *Del* link to modify or delete the notes respectively.

2. Click *New Note* and do the following:

   a. Enter the *Title*.
   
   b. The system displays the name of the potential's *Owner*. Click 📝 to change the owner's name.
   
   c. Enter the *Note Content* in the text box.

3. Click *Save*.

To create quotes

1. In the *Potential Details* page, the existing quote details, if any, are displayed.

   - Click *Subject*, *Quote Stage*, *Valid Till* date, or *Carrier* links to sort the display order of the records.
   - Click the relevant *Edit* or *Del* link to modify or delete the quotes respectively.

2. Click *New*.

3. Enter the quote details.

4. Click *Save*.

To create sales orders

1. In the *Potential Details* page, the existing sales order details, if any, are displayed.
• Click **Subject, Status, Customer No., Due Date, Excise Date, or Sales Commission** links to sort the display order of the records.

• Click the relevant **Edit** or **Del** link to modify or delete the sales orders respectively.

2. Click **New**.

3. Enter the sales order details.

4. Click **Save**.

**To create cases**

1. In the **Potential Details** page, the existing case details, if any, are displayed.

   • Click **Subject, Case Reason, Email, Status, Priority**, or case **Type** links to sort the display order of the records.

   • Click the relevant **Edit** or **Del** link to modify or delete the cases respectively.

2. Click **New**.

3. Enter the cases details.

4. Click **Save**.

**Associate Competitors with Potential**

Most of the companies prefer to purchase products after analyzing different vendors. If you are working with a highly competitive market, where your competitors are directly competing with you in winning the deals, it is always better to know their strengths and weaknesses well in advance so that you can propose your offering in a better way.

This feature enables you to add the competitor's strengths and weaknesses.

**To associate competitors with potential**

1. In the **Potential Details** page, the competitor details, if any, are displayed.

   • Click **Product Name, Product Code, Product Active, Manufacturer, Support Start Date, or Support Expiry Date** links to sort the display order of the records.

   • Click the relevant **Del** link to delete the record.

2. Click **New** and do the following:

   a. Enter the **Competitor Name**. It is mandatory.

   b. Enter the competitor's **Website**.

   c. Enter the **Strengths** and **Weaknesses** in the respective text boxes.
3. Click **Save**.

**Map Contact Roles**

While prospecting, you may need to contact different persons (contacts) to finalize the sales deal. It is always better to know the contact's role in your prospecting organization, so that you always have a right discussion with the right person. For example, explaining about product price and discounts is always better with Financial Manager, whereas explaining product features with the Product Manager. This kind of approach helps you to negotiate with the prospecting organization in a better way and cut short the sales lead-time.

**To map contact roles**

1. Click the **Potentials** tab.
2. In the **Potentials Home** page, select the required potential.
3. In the **Potential Details** page, the contact details, if any, are displayed.
   - Click **Contact Name**, **Phone**, **Email**, or **Role Name** links to sort the display order of the records.
   - Click the relevant **Del** link to delete the record.
4. Click **Add Contact Role**.
5. In the **Contact Roles Mapping** page, for each contact select the role from the **Contact Role** drop-down list.
6. Click **Save**.

**Customize Contact Roles**

By default, some of the contact roles, such as Decision Maker, Product Management, Purchasing and other roles are available. You can customize the contact roles according to your business process. Only users with Administrator privilege can customize the contact roles.

**To add/modify contact roles**

1. Click the **Setup > Potential Settings > Contact Roles**.
2. In the *Edit Contact Roles* page, do the following:
   a. Click the **Add Role** link and enter the new contact role.
   b. Select the required check box(es) that you want to delete, and then click the **Delete Role** link.
   c. Modify the existing roles.
3. Click **Save**.

### Set up Big Deal Alert

You can use the Big-deal Alert function to notify your management/Colleagues about a chance of winning a big deal that you would like to share with them. Sometimes, executive board members may be interested to know all the Big-deal information well in advance. You can send the Big-deal alert as an e-mail notification to all the Zoho CRM users or to the selected users and colleagues not registered as Zoho CRM users.

**To configure big deal alert**

1. Click **Setup > Potentials Settings > Big Deal Alert**.
2. In the *Workflow Rule* page, the **Big Alert** rule details are displayed. The default criteria is "**Amount >= 1000 and the probability = 100**".
3. Click **Edit** to modify the **Rule Details**.
4. In the *Related Alerts* section, the alert details are displayed.
The default alert and e-mail template is "Big Deal Alert". You can change the Alert
details by editing the existing alert.

5. In the *Related Tasks* section, you can add tasks for the alert rule.

**Configure Sales Stage Pick list**

**To add or modify pick list value**

1. Click *Setup > Potentials Settings > Field List*.
2. In the *List of Fields* page, click the *Edit* link corresponding to the fields.

![Field Information](image)

*Figure 13: Field Information*

3. The system displays the existing pick list values.
4. Modify the existing details, and then click *Save*.

**Note:** You can modify the default stage for new and converted leads.

**Map Stage and Probability Values**

Sales Stage is a very important criteria to identify the performance of organization-wide Sales
pipeline. In the Stage-Probability mapping page you can perform the following operations:

- Create different types of Sales stages according to your organization-wide Sales process
- Associate Probability values to the Sales stages
• Associate Forecast types (Open, Closed-won, or Closed-lost) to Sales stages
• Associate Forecast categories (Pipeline, Closed, Omitted, Best Case, Committed

Tips:

• For a better sales pipeline analysis assign different probabilities to sales stage values.
• For each stage assign probability in the range of 0 to 100.
• You may consider using probability value as 100 when the deal is closed-won and 0 for deal closed-lost.

To map sales stage to probability values, forecast types and forecast categories

1. Click Setup > Potentials Settings > Stage-Probability Mapping.
2. In the Stage-Probability Mapping page, the existing sales stages are displayed.
   • Click the Add Stage link and add new stages.
   • Click the Delete Stage link and delete new stages.
3. In the Stage-Probability Mapping page, do the following:
   a. Enter the Stage Name, its Probability (%), and the Sort Order in the respective boxes.
   b. Select the Forecast Type and the Forecast Category from the respective lists.
4. Click Save.
In This Section:

- Create Forecasts
- Associate to Other Records
- Set up Fiscal Year
Forecasting provides real-time insight for tracking the sales against quotas, probabilities, plans, etc., which helps the organization to fine-tune the sales process. For sales managers, forecast feature provides an overall picture of the company's sales pipeline, as well as those of individual staff performance. Sales representatives can use forecasting to meet/exceed quotas assigned to them and in turn increase company profits.

**Note:** In Zoho CRM, you cannot consolidate the individual sales persons' forecasts and provide the organization-wide forecast.

### Availability

<table>
<thead>
<tr>
<th>Editions</th>
<th>Enterprise</th>
<th>Professional</th>
<th>Free</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>YES</td>
<td>YES</td>
<td>NO</td>
</tr>
</tbody>
</table>

### Create Forecasts

In Zoho CRM, you can create forecasts for a financial year and for each quarter by entering data manually.

You can create forecast for a specific quarter only once. For example, if you create a forecast for Quarter 1 in Year 2006, then you cannot create another forecast in the same quarter. You can only modify the existing quarter details.

**Note:** You cannot customize the fields in forecast module.

**To create forecasts**

1. In the *Forecast* module, click *New Forecast*.
2. In the *Create Forecast* page, enter the forecast details.
3. Click *Save*. 
Set up Fiscal Year

This option allows you to configure the Fiscal Year Settings according to your organization's Fiscal cycle. Once the Fiscal start month is selected, fiscal quarters are automatically rolled up.

**Configuration of Fiscal Year**

<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Select Fiscal Start Month</strong></td>
<td><strong>Select Fiscal Start Month</strong></td>
</tr>
<tr>
<td>Fiscal Start Month : <strong>January</strong></td>
<td>Fiscal Start Month : <strong>April</strong></td>
</tr>
</tbody>
</table>

**Forecast for Q1-2008**

<table>
<thead>
<tr>
<th>Month</th>
<th>Quota</th>
</tr>
</thead>
<tbody>
<tr>
<td>January</td>
<td>$100,000.00</td>
</tr>
<tr>
<td>February</td>
<td>$120,000.00</td>
</tr>
<tr>
<td>March</td>
<td>$150,000.00</td>
</tr>
<tr>
<td><strong>Totals:</strong></td>
<td><strong>$370,000.00</strong></td>
</tr>
</tbody>
</table>

**Forecast for Q4-2007**

<table>
<thead>
<tr>
<th>Month</th>
<th>Quota</th>
</tr>
</thead>
<tbody>
<tr>
<td>January</td>
<td>$100,000.00</td>
</tr>
<tr>
<td>February</td>
<td>$120,000.00</td>
</tr>
<tr>
<td>March</td>
<td>$150,000.00</td>
</tr>
<tr>
<td><strong>Totals:</strong></td>
<td><strong>$370,000.00</strong></td>
</tr>
</tbody>
</table>

**Figure 14: Fiscal Year**

*Note:* By default, fiscal year is configured as January to December.

**To set up Fiscal Year**

1. Click **Setup > Admin Settings > Fiscal Year**.
2. In the **Fiscal Year** page, select the **Fiscal Start Month** from the drop down list.
3. Click **Submit**.

Note that changing the **Fiscal Start Month** will affect the following:

- The new, as well as the existing forecast records
- The settings configured for Financial year and Financial Quarter in Reports and Dashboards
Associate Forecasts with Other Records

After creating forecasts, you can add potentials in each month. Once the potential is closed it is automatically displayed under forecast history. All the potentials created followed-up are displayed under sales person’s monthly forecast list.

To associate forecast with other records

1. In the Forecast Details page, the following details are displayed:

   - **Potentials’ list for specific months**: Displays the list of potentials and the corresponding forecast details for a month. You can also add new potential to the month.

     ![Figure 15: Potentials' List](image)

     - **Forecast History**: Displays the overall details of the forecast with aggregate Quota, Closed Amount, Committed Amount, Best Case Amount details.
In This Section:

- Marketing Automation in ZCRM
- Campaign Management
- Web Forms
- Auto-Response Rules
- Email Marketing
- Autoresponders
In This Section:

- Introduction to Marketing Automation
As part of the marketing automation, Zoho CRM provides Campaign management, E-mail marketing, and Web Forms (to generate leads, contacts, and cases) useful for integrating your organization's sales and marketing activities.

With the Zoho CRM campaign management features, you can effectively plan marketing expenditure and thereby improve the quality of lead generation process. In addition, campaign management integrated with leads and opportunities modules helps your organization in measuring the campaign performance and effectiveness.

<table>
<thead>
<tr>
<th><strong>Campaign Management</strong></th>
<th>Campaigns refer to the marketing process which is planned, executed, distributed and analyzed.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create Campaigns</td>
<td>Associate Campaigns</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Web Forms</strong></th>
<th>Web forms will help you to capture leads contacts and cases online.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create Web Forms</td>
<td>Insert Captcha</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Email Marketing</strong></th>
<th>Use emails to reach numerous customers by sending mass emails and use autoresponders to follow up with the customers.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mass Emails</td>
<td>Schedule Mass Emails</td>
</tr>
</tbody>
</table>
In This Section:

- Create Campaigns
- Associate to Other Records
CHAPTER 8
CAMPAIGN MANAGEMENT

Campaign management allows you to manage your entire marketing process by which marketing campaigns are planned, produced, distributed and analyzed. This includes planning the campaign, preparing your mailing list, executing the campaign and then analyzing the results.

Availability

<table>
<thead>
<tr>
<th>Editions</th>
<th>Enterprise</th>
<th>Professional</th>
<th>Free</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
</tr>
</tbody>
</table>

Permission Required: Campaigns Tab

You can use the Campaigns module for the following:

- Planning marketing activities and developing campaign hierarchies.
- Outlining marketing campaign objectives.
- Defining campaign success metrics.
- Building and testing sample campaigns on a subset of customer data.
- Storing and reusing content from previous marketing campaigns.
- Measuring campaign effectiveness by linking directly to the leads and potentials.
- Tracking customer inquiries related directly to campaigns.
- Tracking sales force closures related directly to campaigns.

Create Campaigns

In Zoho CRM, you can create campaigns by:

- Entering data in the campaign details form (manually)
- Using Quick Create option; a quick create component present in the left pane of the Campaigns Home page.
- Duplicating the campaigns with few changes in the existing details.
To create campaigns individually
1. In the Campaigns module, click New Campaign.
2. In the Create Campaign page, enter the campaign details.
3. Click Save.

To create campaigns instantly
1. Click the Campaigns tab.
2. On the left pane of the Home page, select Campaigns from the Quick Create list.

![Quick Create](image)

3. In the pop up window, enter the relevant details.
4. Click Save.

To create duplicate campaigns
1. In the Campaigns tab, click a particular campaign that is to be duplicated.
2. In the Campaign Details page, click Clone.
3. In the Clone Campaign page, modify the required details.
4. Click Save.

Associate Campaign with Other Records
After creating campaigns, you may need to associate campaigns with other records, such as tasks, events, attachments, leads, contacts, and potentials.
To attach documents

This feature enables you to attach documents, spreadsheets and presentations to the leads. You can attach them in the following ways:

- Attach from Desktop
- Attach from Zoho Docs
- Attach from Google Docs

To create tasks or events

1. In the Campaign Details page, the existing task or event details, if any, are displayed.
   - Click Subject, Activity Type, Status, Due Date or Owner Name links to sort the display order of the records.
   - Click the relevant Edit, Del, or Close link to modify, delete, or close the task respectively.
2. Click New Task/New Event/Log a Call and specify the relevant details.

Note: Once the activity is over, you can close the activity using the Close link.

To create leads

1. In the Campaign Details page, the existing lead details, if any, are displayed.
   - Click Name, Company, Email, Lead Source, or Status links to sort the display order of the records.
   - Click the relevant Edit or Del link to modify or delete the leads respectively.
2. Click New.
3. Enter the lead details.
4. Click Save.

To create contacts

1. In the Campaign Details page, the existing contact details, if any, are displayed.
   - Click Contact Name, Email, Phone, Mobile, or Fax links to sort the display order of the records.
   - Click the relevant Edit or Del link to modify or delete the contacts respectively.
2. Click New.
3. Enter the contact details.
4. Click **Save**.

**To create potentials**

1. In the *Campaign Details* page, the existing potential details, if any, are displayed.

   - Click **Potential Name**, **Amount**, **Stage**, **Probability (%)**, **Closing Date**, or **Type** links to sort the display order of the records.
   - Click the relevant **Edit** or **Del** link to modify or delete the potentials respectively.

2. Click **New**.

3. Enter the potential details.

4. Click **Save**.
In This Section:

- Web Forms
- Auto-Response Rules
CHAPTER 9

WEB FORMS

Web forms simplify the process of capturing visitors' or users' information from the website into your CRM system. They are designed to automate importing of data from website into Zoho CRM and to enable non-technical users to design and publish their own web forms.

Before setting the web form, ensure the following check-list:

- Create a default Email template to send automated replies to website visitors upon submission of their details.
- Create an Assignment rule if you wish to assign the incoming records to specific users. By default, all incoming records are assigned to the Administrator.
- Configure the Web form further, to suit your requirements. By default, the web form contains only web related tags.
- Customize the fields to be added in the web form.
- Test the entire workflow of Web form, before publishing in the Website.

Availability

<table>
<thead>
<tr>
<th>Editions</th>
<th>Enterprise</th>
<th>Professional</th>
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</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>20/module</td>
<td>10/module</td>
<td>1/module</td>
</tr>
</tbody>
</table>

| Permission Required | Web-to-Leads/Contacts/Cases |

Benefits

- Web forms can be used to:
- Capture data (visitors' information)
- Communicate with website visitors
- Conduct surveys
- Respond to user queries
- Generate online sales
- Receive online feedback
Create Web Forms

To create web forms for Leads, Contacts, and Cases

1. Click Setup.
2. In the Setup page, under Leads/Contacts/Cases Settings, click the Web-to-Leads/Contacts/Cases Form link.
3. In the Web to Lead/Contact/Case page, click Create New Form.
4. Specify the corresponding details in the following sections:
   - Form Properties
   - Field Selection
   - Lead/Contact/Case Assignment
   - Email Notification
   - Generate Web Form

Step 1: Form Properties

1. Enter a Form Name (eg. Feedback form, Data form, etc.).

![Form Properties](image-url)

Figure 17: Form Properties
2. Enter the URL of the web page to which the visitor needs to be redirected once the web form is submitted. Specify a valid Return URL starting with "http:// or https://". **Note:** The length of Return URL should not exceed 50 characters.

3. Enter the URL of the website where the web form is to be hosted. It should start with "http:// or https://". This prevents spam and allows only forms submitted through the particular domain to be captured as valid information.

**Note:**
- If the domain name does not match with the URL where the web form is hosted, then the information will not be captured.
- Alternatively, you can enter [*] in the domain name field to capture from other / multiple domains.

**Step 2: Fields Selection**

1. Select the fields' check boxes that are to be displayed in the web form.

![Image of Fields Selection](image)

**Figure 18: Field Selection**

**Note:**
- The fields displayed here are those available in the particular module's (Leads/Contacts/Cases) Field list.
To have custom field, you need to first create them in the particular module.

**For Web to Contact form:** Account Name is available while creating Web to Contact forms. When this field is used in the web form, and contact details are submitted, an Account will automatically be created in CRM. There can be cases when the Account already exists in your CRM account. **Only in such cases, a new Account will not be created.**

**Note:** An Account will be created, even if certain mandatory fields details are not provided. Later, when the account is edited, you need to provide the other mandatory details before saving the record.

**Step 3: Lead/Contact/Case Assignment**

**Note:** The option to select Assignment Rules to assign owners to the records, is available only in Paid Editions.

![Lead Assignment](image)

**Figure 19: Lead Assignment**

1. Select the check box to enable manual approval of records generated through the web form.
2. Click ![user icon] to select a user as owner to the records.
3. Select the **Lead Assignment Rule** from the list.
4. Click **Manage Rules** link to edit the corresponding assignment rule.

**Note:**

- Enabling Manual record approval will help you to validate the generated records manually and then add them to Zoho CRM. You can see those Leads in Approve Leads.
- You can setup Zoho CRM to automatically assign users for the records generated from website by selecting the Select User option or by creating Assignment rules.
Step 4: Email Notification

1. Select the email template from the list. The template that you select will be used to send an auto-response email to the user who submits the form.

2. Select the Notify Owner checkbox to send an email to the owner, when a record is generated through your Website.

Note: While creating web to case forms, there will be an extra option to Enable Contact Creation when cases are generated using the web forms.

Step 5: Generate Web Form

1. Click Save & Next.
2. It generates the HTML code for the web form.

**Note:**

- In order to avoid spam, the generated Web Form (HTML file) must be published in an active web server (Apache, Microsoft, IIS, etc.).
- The web form will not work if you submit the form values from your desktop.

**Inserting Captcha**

Captcha can be used in your web forms to prevent SPAM. You can add captcha by inserting the following in the HTML code that is generated for the web form.

**Use this code before closing the div tag**

```html
<script>
function randomgen()
{
    var rannumber="";
    for(ranNum=1; ranNum<=6; ranNum++){
        rannumber+=Math.floor(Math.random()*10).toString();
    }
    document.getElementById('varifyNum').innerHTML=rannumber;
    document.getElementById('varifyNumHidden').value=rannumber;
}
randomgen();

//Verification number generate code End here

//Validation Start Here
function validateForm()
{
    var thefrm=document.contactForm;
    if(thefrm.enterVerify.value=="")
```
```javascript
{
    alert("Enter your Verification Code");
    thefrm.enterVerify.focus();
    return false;
}
else if(thefrm.enterVerify.value!="")
    if(thefrm.enterVerify.value!=thefrm.varifyNumHidden.value)
    {
        alert("please Enter Currect Verification Number");
        randomgen();
        thefrm.enterVerify.select();
        thefrm.enterVerify.focus();
        return false;
    }
else
    {
        return true;
    }
}
else
    {
        return true;
    }
</script>
```
Use this code

<tr>
    <td style="font-family: sans-serif; font-size: 12px;" class="feature-border" align="right" nowrap="nowrap" width="29%">Verification Code:</td>
    
    <td class="feature-border" align="left" valign="middle" width="66%">
        <input name="varifyNumHidden" id="varifyNumHidden" value="701469" type="hidden">
        
        <input name="enterVerify" id="enterVerify" type="text"/>
        
        <div id="varifyNum" style="font-size: 14px; font-family: Arial,Helvetica,sans-serif; font-weight: bold;"></div>
    </td>
</tr>

Before the Save and Reset button code:-

<tr><td colspan=2 align=center style='background-color:#eaeaea'>
    <input type='submit' name='save' value=Save /> &nbsp; &nbsp; <input type='reset' name='reset' value=Reset />
</td></tr>

3. Replace the code,

<form action='https://crm.zoho.com/crm/WebToContact' method='POST' onSubmit='javascript:document.charset="UTF-8";' accept-charset='UTF-8'>
</form>

With

<form action='http://crm.zoho.com/crm/WebToContact' name="contactForm" method='POST' onSubmit='return validateForm()'>
Auto Response Rules

The Auto Response rule feature enables you to send automated emails when leads, contacts, or cases are generated through web forms. When a lead is generated through web forms, you may want to send appropriate emails to the leads with different types of requests. In such cases, you can create an auto response rule with specific rule criteria. When a condition is satisfied, the corresponding email is sent. You can create many auto response rules but only one auto response rule can be active at a time.

Availability

<table>
<thead>
<tr>
<th>Editions</th>
<th>Enterprise</th>
<th>Professional</th>
<th>Free</th>
</tr>
</thead>
<tbody>
<tr>
<td>YES</td>
<td>YES</td>
<td>NO</td>
<td></td>
</tr>
</tbody>
</table>

Create Auto Response Rule

To create autoresponse rules for web forms

1. Click Setup > [Module] Settings > Auto Response Rules for Web to [Module]
2. In the Auto Response Rules for Web to [Module] page, click Create Rule.

![Create Auto Response Rule for Web to Lead](image)

Figure 22: Create Auto Response Rules

3. In the Create Auto Response Rules for Web to [Module] page, do the following:
   a. Enter the Rule Name.
   b. Select the checkbox to activate the rule.
4. Click Save.
Create Auto Response Rule Entry

To create autoresponse rule entry

1. Click Setup > [Module] Settings > Auto Response Rules for Web to [Module]
2. In the Auto Response Rules for Web to [Module] page, click on the rule for which you want to create the rule entry.


4. In the Rule Entry page, do the following:
   a. Specify the Rule Criteria.
   b. Choose an Email Template from the drop down list.
5. Click Save.
In This Section:

- Send Mass Emails
- Schedule Mass Emails
- Autoresponders
Communication with customers is an important activity in any business scenario. One of the best ways of communicating is through emails. Zoho CRM provides the option of using emails to reach a large number of customers and send mass emails. You can also create auto responders, schedule mass emails, and create email templates that are ready to use.

**Note:** The Mass Email feature is available only for the Leads and Contacts Module.

In Zoho CRM, you can send bulk emails to customers with respect to your business requirements. For example, you can send newsletters, special offers, updates, or personalized follow-up email to the customers in bulk. While sending bulk emails to customers, you can choose a predefined template for the message from various Email templates. Bulk emails can be sent in the following ways:

- Sending Mass emails manually
- Scheduling Mass Emails

**Note:**
- Before sending emails, ensure that the record contains a valid email address.
- Emails will not be delivered to the records with invalid email address.

**Benefits**

- Save time in sending emails to the entire list of customers.
- Create new mailing list based on business requirements.
- Schedule emails to send later according to your convenience.
- Allow customers to subscribe/unsubscribe from the mailing list using Email opt-out.

**Send Mass Emails**

In Zoho CRM, you can send mass emails to customers manually, by creating a new mailing list or by using the existing list. You can select the recipients list in two ways:

- Instant Filter (creating New Custom View)
- Existing Custom View

**Note:**
- The Mass Email feature is available only in the Leads and Contacts modules.
You need to create e-mail templates before sending mass e-mails.
- You can send a maximum of 250 mass emails per day, per company.
- The 250 emails per day, per company includes the Autoresponders, active email Schedulers, and Mass emails.
- There is no limit to the number of emails that you send individually.

**Availability**

<table>
<thead>
<tr>
<th>Editions</th>
<th>Enterprise</th>
<th>Professional</th>
<th>Free</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>YES</td>
<td>YES</td>
<td>NO</td>
</tr>
</tbody>
</table>

| Permission Required | Mass Email Leads/Contacts |

**To send mass emails**

1. Click the Leads or Contacts tab.
2. In Home page, under Leads/Contacts Tools, click Mass E-mail Leads/Contacts.
3. In the Mass E-mail page, by default, the system displays the E-mail Template tab.
   - Select Email Templates
     - Click the Email Template tab
     - Under Email Templates section, select the Template from the list. Note, that you cannot edit the e-mail content here.
     - Click the New Template link to create a template.
Select Records.

- Click the Select Records tab
- Click Custom View Criteria, and then Select Custom View from the list, or
- Click Manual Criteria, to search and select the required records manually.

4. Click Send.

**Schedule Mass Email**

This feature enables you to schedule bulk e-mails to be sent to the selected leads or contacts. For example, you want to send the emails to customers at 10 AM PST, but you have an important meeting at that time. In that case, you can schedule the emails to be sent at 10 am PST by using the Mass Email Scheduler, i.e. the emails are sent to the customers at the scheduled time even in your absence.

Note:

- You can send 250 emails per day (12 AM to 11.59 PM PDT is considered as one day), per company.
- The 250 emails per day, per company includes the Autoresponders, active email Schedulers, and Mass emails.
- There is no limit to the number of emails that you send individually.
For a given scheduled time only three bulk e-mail processes are possible.

**To schedule mass emails**

1. Click the **Leads** or **Contacts** tab.
2. In the **Home** page, under **Leads/Contacts Tools**, click **Schedule Mass Email**.
3. Click **New Mass Mail Schedule**.

![New Mass Mail Scheduler](image)

**Figure 25: Mail Scheduler**

4. In the **New Mass Mail Scheduler** page, do the following:
   a. Enter the **Mass Mail Scheduler Name**.
   b. Select the **Custom View** from the list.
   c. Select the **Email Template** from the list.
   d. Select the **Active** check box.

   *Only when you select the **Active** check box, the scheduled mails will be delivered.*
   e. Enter the **Start Date** and **Time** to schedule the mails.

   *Enter the date in **MM/DD/YYYY** format, or select the date from the calendar displayed. Select the hours and minutes from the respective lists.*

5. Click **Save**.

   The system displays the View Mass Mail Schedule page.

6. Click **Edit** or **Delete**, as required.
7. Click **Go Back**. The created Scheduler is displayed under Mass Mail Schedulers.

**Note:** The e-mail templates will be available in the list only if you had already created them.

### Autoresponders

Building business relationships is a marketing priority, and when it comes to lead nurture programs, proper follow-up with prospects is essential to win deals. Autoresponder is a marketing automation functionality that can streamline the process of sending series of personalized email messages at predefined intervals to the leads and contacts. Additionally, you can exclude the responded leads or contacts from the next follow-up Emails.

You can use autoresponders in many ways. Some of the real-time business scenarios are listed below:

- Nurture leads
- Provide email tutorial courses regarding your product
- Send introduction Emails to the customers
- Automate reminder emails to receive payments from customers
- Schedule Newsletters

#### Availability

<table>
<thead>
<tr>
<th>Editions</th>
<th>Enterprise</th>
<th>Professional</th>
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</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>YES</td>
<td>NO</td>
<td>NO</td>
</tr>
</tbody>
</table>

#### Steps to Schedule Autoresponders

- Set up Web forms (Optional)
- Set up Custom Views with your contacts
- Set up Email Templates
- Set up Autoresponders
Figure 26: Visitor submits a Web Form
Email Marketing

Figure 27: Visitors' information is stored in Zoho CRM - Manage Custom View for filtering Leads/Contacts

Figure 28: Set up Email Templates for sending emails to Leads/Contacts
Set up Autoresponder

Autoresponders are the solution to send automated replies and follow-up emails to the prospects and customers. Once you receive a response from the lead or contact, you have to manually exclude the contacts from the mailing list.

Important Notes:

- **Module** refers to the different tabs. For example, Leads, Contacts, Accounts etc.
- **Custom view** selected for the autoresponder must contain new data. If you select a custom view in which data is not new, autoresponder will send the first email to the same old data during subsequent iterations. For example, you can select custom views "Today's Leads" and "New This Week Contacts" instead of "All Open Leads" and "Recently Created Leads". In the Today's Leads view, data is always updated with the today's data whereas the data in All Open Leads view may not change frequently.
- **While setting up Dynamic type Autoresponders**, always select the Custom Views according to the options in the Recurrence Pattern section. If you set the recurrence pattern as **By Day**, make sure your data in the selected custom view is new every day. Similarly if you select **By Week**, your data must be a new one for that week before the
autoresponder is initiated. If the data used is old, autoresponder will send the first email to the same data during subsequent iterations.

- While executing the autoresponder, system cannot identify the duplicate records. Hence, you are recommended to check for the duplicate contacts and merge with the primary record, before setting up the autoresponder.

- At present, you cannot track the response when customer responds to your email. Hence, you have to manually select the contacts from the mailing list to exclude them from the next follow-up.

- Use the unsubscription form in the autoresponder email templates. By using unsubscription form, you can allow the recipients to opt out from your next follow-up and avoid Anti-SPAM complaints.

- After setting up autoresponders, better not to change the Custom View, duration of the next follow-up and the follow-up template options.

**To set up autoresponders**

1. Click the [Module] tab.
3. In the Autoresponders page, click **Create Autoresponder**.
4. In the New Autoresponder page, under the Autoresponder Details section, do the following:

   a. Enter the Name of the autoresponder.

   b. Select the owner of the records from the Assigned To pick list.

      By default, the field displays the name of the user who creates the autoreponder.

   c. Select the Custom View to set up the recipient list for the autoresponder.
d. Select a **Folder** for the autoresponder.

e. Select **Static** or **Dynamic** and specify the corresponding details. (Refer the table for the list of standard fields)
   - **Static** - Autoresponder in which the Follow-up happens on a fixed date.
   - **Dynamic** - Autoresponder in which the Follow-up happens on predefined intervals set by you.

5. Click **Save**

**Note:**

- You will be able to change the name of the user in the **Assigned To** field, only if you have the permission to change the owner of the records.
- The autoresponder email will be sent only to the records that belong to the user specified in the **Assign To** field.
- The autoreponder email will not be sent to the records for which the **Email Opt Out** is enabled.
- Only when you clear the **Email Opt Out** checkbox in the **Record's Details** page, the autoreponder emails will be sent to those records.

The following table gives the list of fields and their description when **Static** option is selected.

<table>
<thead>
<tr>
<th>Fields</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Follow-up Date</td>
<td>Specify the follow-up date. The follow-up date is calculated with respect to the day when the autoresponder is initiated.</td>
</tr>
<tr>
<td>Email template</td>
<td>Choose the template from the drop-down list.</td>
</tr>
</tbody>
</table>

The following table gives the list of fields and their description when **Dynamic** option is selected.

<table>
<thead>
<tr>
<th>By Day - Fields</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recur every ___ day(s)</td>
<td>Enter how often in days the autoresponder should be</td>
</tr>
<tr>
<td><strong>Recall every</strong></td>
<td><strong>Description</strong></td>
</tr>
<tr>
<td>------------------</td>
<td>----------------</td>
</tr>
<tr>
<td><strong>Recur everyday</strong></td>
<td>Select this if the autoresponder should be repeated everyday. Select the Start date (MM/dd/yyyy format) and time for the autoresponder.</td>
</tr>
<tr>
<td><strong>End by</strong></td>
<td>Select the End date for the autoresponder in MM/dd/yyyy format.</td>
</tr>
<tr>
<td><strong>No end date</strong></td>
<td>Select this if the autoresponder should continue repeating till you specify an end date.</td>
</tr>
<tr>
<td><strong>Choose Email Template</strong></td>
<td>Choose the template from the drop-down list.</td>
</tr>
<tr>
<td><strong>Add Follow-up</strong></td>
<td>Click the link to add follow-ups for the autoresponder. <strong>Example:</strong> The autoresponder is initiated on 01-01-2010 and the follow-up dates specified are <em>After 3 days</em> and <em>After 10 days</em>. In such a case, the first follow-up email will be sent on 04-01-2010 and the second follow-up email will be sent on 11-01-2010.</td>
</tr>
</tbody>
</table>

### By Week - Fields

<table>
<thead>
<tr>
<th>**Recur every ____week(s) on **</th>
<th><strong>S-M-T-W-T-F-S</strong></th>
<th><strong>Description</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>**Recall every ____week(s) on **</td>
<td><strong>S-M-T-W-T-F-S</strong></td>
<td>Enter how often in weeks the autoresponder should be repeated. Then, select the checkbox(es) that correspond to the day(s) of the week on which the recurrence should occur.</td>
</tr>
<tr>
<td><strong>Start by</strong></td>
<td>Select the Start date (MM/dd/yyyy format) and time for the autoresponder.</td>
<td></td>
</tr>
<tr>
<td><strong>End by</strong></td>
<td>Select the End date for the autoresponder in MM/dd/yyyy format.</td>
<td></td>
</tr>
<tr>
<td><strong>No end date</strong></td>
<td>Select this if the autoresponder should continue repeating till you specify an end date.</td>
<td></td>
</tr>
<tr>
<td><strong>Choose Email Template</strong></td>
<td>Choose an email template for the autoresponder from the drop-down list.</td>
<td></td>
</tr>
<tr>
<td><strong>Add Follow-up</strong></td>
<td>Click the link to add follow-ups for the autoresponder. <strong>Example:</strong> The autoresponder is initiated on 01-01-2010 and the follow-up dates specified are <em>After 3 days</em> and <em>After 10 days</em>. In such a case, the first follow-up email will be sent on 04-01-2010 and the second follow-up email will be sent on 11-01-2010.</td>
<td></td>
</tr>
</tbody>
</table>
### By Month - Fields

<table>
<thead>
<tr>
<th><strong>Day __ of every ___ month(s)</strong></th>
<th>Enter how often in months and on the specified date the autoresponder should be repeated.</th>
</tr>
</thead>
<tbody>
<tr>
<td>____ _____ of every month</td>
<td>Select a particular day when the autoresponder should be repeated every month.</td>
</tr>
<tr>
<td><strong>Start by</strong></td>
<td>Select the Start date (MM/dd/yyyy format) and time for the autoresponder.</td>
</tr>
<tr>
<td><strong>End by</strong></td>
<td>Select the End date for the autoresponder in MM/dd/yyyy format.</td>
</tr>
<tr>
<td><strong>Choose Email Template</strong></td>
<td>Choose an email template for the autoresponder from the drop-down list.</td>
</tr>
<tr>
<td><strong>Add Follow-up</strong></td>
<td>Click the link to add follow-ups for the autoresponder.</td>
</tr>
</tbody>
</table>

**Example:** The autoresponder is initiated on 01-01-2010 and the follow-up dates specified are *After 3 days* and *After 10 days*. In such a case, the first follow-up email will be sent on 04-01-2010 and the second follow-up email will be sent on 11-01-2010.

**Note:**
- Auto-responders feature is available only in the **Leads** and **Contacts** modules
- You can send maximum 250 mass emails per day, per company.
- You can set a maximum of 3 autoresponders and a maximum of 5 follow-ups per autoresponder.

### Create Folders

In Zoho CRM, you can create various folders for a better organization of your autoresponders. This helps you to keep them classified under different categories for quick access.

**To create folders**

1. Click the **[Module]** tab.
3. In the **Autoresponders** page, click **Create Folder**.
4. In the *Create Folder* page, do the following:
   a. Enter the **Folder Name**.
   b. Enter the **Description**.
   c. Under **Accessibility Details**, select the option to specify the accessibility to the autoresponder feature.

5. Click **Save**.

**Excluding Contacts from Follow-up**

After receiving replies from the recipients, you can exclude the leads or contacts from the follow-up, and schedule the next follow-up only to the leads/contacts that have not responded.
To exclude records from the next follow-up

1. Click the [Module] tab.
3. In the Autoresponders page, click the Update Response link corresponding to the autoresponder.

4. In the Mail Sent List overlay, select the leads/contacts to be excluded from the next follow-up.
5. Click Update Response.

To exclude records before the autoresponder is initiated

The Mailing List will be available only after the autoresponder is initiated. In case you want to exclude some contacts from the mailing list, even before the autoresponder is initiated, follow the steps given below:

1. Click the Leads or Contacts tab.
2. In the [Module] Home page, select the checkbox(es) corresponding to the records that you want to exclude.
3. Click **More Options**, and then click the **Update Response** link.

![Figure 33: Update Response](image)

4. In the *Select Autoresponder* popup window, select the autoresponder from the drop-down list.

5. Click **Save**.

**Including all Contacts in the Follow-up**

This option enables you to include all the contacts for the follow-up that you had excluded from the mailing list.

**To include all the record for the next follow-up**

1. Click the *[Module]* tab.
2. In the *[Module]* Home page, under *[Module]* Tools, click the **Autoresponders** link.
3. In the *Autoresponders* page, click the **Reset** link corresponding to the autoresponder.

**Autoresponder Scenario**

Here is a real-time scenario, just one of the many ways in which you can use autoresponders.

**The Challenge**

A user has shown interest in your product and has subscribed for a 30 day free trial of your product. Your challenge here is to engage the prospect in your product and follow-up with right email messages to win the deal. This is a real-time Drip Marketing situation where autoresponders can be used.
The Scenario

- A visitor to your web site fills the web form and signs up for a 30 day trial period of your product.
- An auto-generated Thank you / Welcome email is sent to the user.
- User's (lead) details are listed in Zoho CRM under a custom view (eg: Today's Leads).
- Autoresponder is initiated.
  - Day 1 - 'Getting Started' email is sent to the user.
  - Day 2 - 'Support and Feedback Information' email is sent.
  - Day 5 - 'Product Updates' email is sent.
  - Day 15 - 'Purchase Offer' email is sent.
  - Day 25 - 'Reminder' email is sent.

Note: If the user subscribes to the product and is excluded from the mailing list, then the follow-up emails that come after will not be sent.

The procedure to set up autoresponder

1. Click the Leads tab.
2. In the Leads Home page, under Lead Tools, click the Autoresponders link.
3. In the Autoresponders page, click Create Autoresponder.
4. In the New Autoresponder page, under the Autoresponder Details section, do the following:
   a. Enter the Name of the autoresponder.
   b. Select the Custom View to set up the recipient list for the autoresponder.
   c. Select a Folder for the auto-responder.
   d. Select Dynamic and specify the corresponding details (Refer the table.)
5. Click Save.

Note: If the user subscribes to the product, during the follow-up process, the user's email address should be excluded from the mailing list. On excluding the email address, the successive follow-up emails will not be sent to the user.
The following table provides information on the options that you need to specify for the autoresponder.

<table>
<thead>
<tr>
<th>Field Names</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Recurrence Pattern</strong></td>
<td></td>
</tr>
<tr>
<td><strong>By Day</strong></td>
<td>Select this option to specify the recurrence pattern by day.</td>
</tr>
<tr>
<td><strong>Recur everyday</strong></td>
<td>The autoresponder will be initiated everyday</td>
</tr>
<tr>
<td><strong>Start Date</strong></td>
<td>Specify the start date of the autoresponder</td>
</tr>
<tr>
<td><strong>End Date</strong></td>
<td>Specify the end date of the autoresponder</td>
</tr>
<tr>
<td><strong>Choose Email Template</strong></td>
<td>Choose the email template that should be sent on the first day when the autoresponder is initiated. (Getting started email template)</td>
</tr>
</tbody>
</table>

**Follow-up Details**

1. **After 2 days**
   - This email will be sent 2 days after the first autoresponder email
   - Select Support and Feedback Information email template.

2. **After 5 days**
   - The email will be sent 5 days from the day the autoresponder is triggered.
   - Select the Product Updates email template.

3. **After 15 days**
   - The email will be sent 15 days from the day the autoresponder is triggered.
   - Select the Purchase Offer email template.

4. **After 25 days**
   - The email will be sent 25 days from the day the autoresponder is triggered.
   - Select the Reminder email template.
PART III

INVENTORY MANAGEMENT

In This Section:

- Inventory Management in ZCRM
- Product Management
- Price Book Management
- Vendors Management
- Quotes Management
- Sales Order Management
- Purchase Order Management
- Invoice Management
In This Section:

- Introduction to Inventory Management
Zoho CRM extends beyond the traditional CRM functions and enables complete sales cycle management features by integrating Inventory Management features, such as Products, Price Books, Vendors, Sales Quotes, Orders, and Invoices with the Sales related modules, such as Leads, Accounts & Contacts, and Opportunities.

With the Zoho CRM - Inventory Management features you can achieve the seamless integration between pre-sales and post-sales accounting activities in a single application. In addition, you can also procure goods/services from the selected list of vendor.

<table>
<thead>
<tr>
<th><strong>Product Management</strong></th>
<th>Products refer to the goods or services sold or procured by any organization.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Create Products</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Price Book Management</strong></th>
<th>Price Books refer to the agreed price for selling a product to a customer. Based on the agreed terms, the prices can even vary for different customers.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Create Price Books</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Vendor Management</strong></th>
<th>Vendors are the companies, individuals or contractors from whom your organization procures products and/or services.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Create Vendors</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Quotes Management</strong></th>
<th>Quotes are legal agreement between a customer and a vendor to deliver the requested product within the specified time at the agreed price.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Create Quotes</td>
</tr>
</tbody>
</table>
### Sales Order Management
Sales Orders are confirmation of sales, generated after the customer sends a purchase order based on your quotes.

*Create Sales Orders | Associate Sales Orders*

### Purchase Order Management
Purchase Orders are legally bound order-placing document for procuring products or services from vendors.

*Create Purchase Orders | Associate Purchase Orders*

### Invoice Management
Invoices are bills issued by the vendor to the customers along with the goods/services with the purpose of procuring payments.

*Create Invoices | Associate Invoices*
In This Section:

- Create Products
- Associate to Other Records
CHAPTER 12

PRODUCT MANAGEMENT

Products can be either goods or services, which are sold or procured by your organization. In Zoho CRM, you can manage your company-wide products that are sold to the customers as well as procured from the vendors. Hence, both sales and purchasing departments can use the Products module effectively according to their department process. In case your organization procures products from vendors and sell to customers with a markup, both sales and purchase departments can coordinate in a better way.

Sales department can use the products module along with other modules, such as leads, accounts, potentials, quotes, Sales Orders, and Invoices where as purchasing department can use along with Vendors and Purchase Orders. In general Product details page contains the product name, manufacturer/reseller name, part numbers, sales start/end dates, support start/end dates, price, stock position and others.

Availability

<table>
<thead>
<tr>
<th>Editions</th>
<th>Enterprise</th>
<th>Professional</th>
<th>Free</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>YES</td>
<td>YES</td>
<td>NO</td>
</tr>
</tbody>
</table>

In Zoho CRM, you can store product details by entering data in product detail form.

Create Products Individually

You can create individual products by:

- Filling details in the product creation form.
- Using Quick Create option; a quick create component present in the left pane of the Products Home page.
- Duplicating the products with few changes in the existing product details.
List of Standard Product-related Fields

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
<th>Data Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product Name*</td>
<td>Specify the name of the product. This field is mandatory.</td>
<td>Text box, alphanumeric (50)</td>
</tr>
<tr>
<td>Product Code</td>
<td>Specify the product identification.</td>
<td>Text box, alphanumeric (40)</td>
</tr>
<tr>
<td>Product Active</td>
<td>Specify the status of the product.</td>
<td>Check box</td>
</tr>
<tr>
<td>Commission Rate</td>
<td>Specify the commission rate for selling the product.</td>
<td>Text box, decimal ()</td>
</tr>
<tr>
<td>Qty/Unit</td>
<td>Specify the quantity rate for selling the product.</td>
<td>Decimal</td>
</tr>
<tr>
<td>Unit Price</td>
<td>Specify the unit price of the product.</td>
<td>Decimal</td>
</tr>
<tr>
<td>Manufacturer</td>
<td>Select the name of the product manufacturer.</td>
<td>Pick list</td>
</tr>
<tr>
<td>Product Category</td>
<td>Select the category of the product.</td>
<td>Pick list</td>
</tr>
<tr>
<td>Purchase Date</td>
<td>Select the date of purchase from the calendar.</td>
<td>Date</td>
</tr>
<tr>
<td>Support Start Date</td>
<td>Select the date on which the product support starts.</td>
<td>Date</td>
</tr>
<tr>
<td>Support Expiry Date</td>
<td>Select the date on which the product support ends.</td>
<td>Date</td>
</tr>
<tr>
<td>Description</td>
<td>Specify any other details about product.</td>
<td>Text area</td>
</tr>
</tbody>
</table>
To create products individually

1. In the **Products** module, click **New Product**.
2. In the **Create Product** page, enter the product information.
3. Under **Product Information**, select the **Product Active** check box if you want the newly created product to be active.
4. By default, the check box is selected.
5. Click **Save**.

Note: Only the active products are displayed in the list of products

To create products instantly

1. Click the **Products** tab.
2. On the left pane of the Home page, select **Products** from the **Quick Create** list.
3. Enter the relevant details.
4. Click **Save**.

To create duplicate products

1. In the **Products** tab, click a particular product that you want to be duplicated.
2. In the **Product Details** page, click **Clone**.
3. In the **Clone Product** page, modify the required details.
4. Click **Save**.

Associate Product with Other Records

You can create a 360-degrees view of the product to display all the associated details, such as products, trouble tickets, open activities, history of the completed activities, attachments, and notes.

To attach documents

This feature enables you to attach documents, spreadsheets and presentations to the products. You can attach them in the following ways:

- Attach from Desktop
- Attach from Zoho Docs
- Attach from Google Docs
To create leads
1. In the Product Details page, the existing lead details, if any, are displayed.
   - Click Name, Company, Email, Lead Source, or Status links to sort the display order of the records.
   - Click the relevant Edit or Del link to modify or delete the leads respectively.
2. Click New.
3. Enter the lead details.
4. Click Save.

To create contacts
1. In the Product Details page, the existing contact details, if any, are displayed.
   - Click Contact Name, Email, Phone, Mobile, or Fax links to sort the display order of the records.
   - Click the relevant Edit or Del link to modify or delete the contacts respectively.
2. Click New.
3. Enter the contact details.
4. Click Save.

To create potentials
1. In the Product Details page, the existing potential details, if any, are displayed.
   - Click Potential Name, Amount, Stage, Probability (%), Closing Date, or Type links to sort the display order of the records.
   - Click the relevant Edit or Del link to modify or delete the potentials respectively.
2. Click New.
3. Enter the potential details.
4. Click Save.

To create accounts
1. In the Product Details page, the existing account details, if any, are displayed.
   - Click Account Name, Phone, Website, Account Type, Industry, or Annual Revenue links to sort the display order of the records.
Click the relevant **Edit** or **Del** link to modify or delete the accounts respectively.

2. Click **New**.
3. Enter the account details.
4. Click **Save**.

**To create tasks or events**

1. In the *Product Details* page, the existing task or event details, if any, are displayed.
   - Click **Subject**, **Activity Type**, **Status**, **Due Date** or **Owner Name** links to sort the display order of the records.
   - Click the relevant **Edit**, **Del**, or **Close** link to modify, delete, or close the task respectively.
2. Click **New Task/New Event/Log a Call** and specify the relevant details.

**To create cases**

1. In the *Product Details* page, the existing case details, if any, are displayed.
2. Click **Subject**, **Case Reason**, **Email**, **Status**, **Priority**, or case **Type** links to sort the display order of the records.
3. Click the relevant **Edit** or Del link to modify or delete the cases respectively.
4. Click **New**.
5. Enter the case details.
6. Click **Save**.

**To create solutions**

1. In the *Product Details* page, the existing solution details, if any, are displayed.
   - Click **Solution Title**, **Solution Number**, **Published**, **Status**, or **Number of comments** links to sort the display order of the records.
   - Click the relevant **Edit** or **Del** link to modify or delete the solutions respectively.
2. Click **New**.
3. Enter the solution details.
4. Click **Save**.
**To add price books**

1. In the *Potential Details* page, the existing note details, if any, are displayed.
   - Click *Title*, *Note Content*, *Modified Time*, *Created Time*, or *Owner Name* links to sort the display order of the records.
   - Click the relevant *Edit* or *Del* link to modify or delete the notes respectively.

2. Click *New Note* and do the following:
   a. Enter the *Title*. It is mandatory.
   b. The system displays the *Owner Name*. Click to change the owner's name.
   c. Enter the *Note Content* in the text box.

3. Click *Save*.

**Customize Tax Rates**

This feature enables you to manage taxes and the corresponding tax rates.

**To customize tax rates**

1. Click the *Setup > Products Settings > Customize Tax Rates*.

![Figure 34: Add Tax](image)

2. In the *Customize Tax Rates* page, by default the Tax Labels, namely Sales Tax and VAT are displayed.

3. Enter the *Tax Value* for each Tax Label.

4. Click the *Add Tax* link to add more tax rates.

5. Click *Save*. 
In This Section:

- Create Price Books
- Associate to Other Records
Price Books are used for selling products at different prices, based on the agreement terms with a particular type of customer. For each customer you can sell the same product at different prices.

There are two key prices in price books. One is Unit Price and the other is List Price.

**Unit Price** - It is a price fixed by the manufacturer for the product and which cannot be changed.

**List Price** - It is the sellers' price. The manufacturer/resellers may sell the product with different prices to their resellers/customers. These variable prices for the same product are called as List Prices.

### Availability

<table>
<thead>
<tr>
<th>Editions</th>
<th>Enterprise</th>
<th>Professional</th>
<th>Free</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>YES</td>
<td>YES</td>
<td>NO</td>
</tr>
</tbody>
</table>

**Note:** While creating a potential you can select products only from a single price book.

### Create Price Books

In Zoho CRM, you can store price book details by entering data in the Price Book form or importing the data from external sources.

### List of Standard Fields

In the Price Book Edit form, you need to specify the Price Book-related information. The following table provides descriptions of the various fields in the form.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
<th>Data Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Price book Owner</td>
<td>Select the price book owner from the available users list</td>
<td>Lookup</td>
</tr>
</tbody>
</table>
## Create Price Books Individually

You can create price books individually by:

- Filling details in the price book creation form.
- Using Quick Create option; a quick create component present in the left pane of the Price Books Home page.
- Duplicating the price book with few changes in the existing price book details.

### To create price books individually

1. In the Price Books module, click New Price Book.
2. In the Create Price Book page, enter the price information.
3. Click Save.

**Note:**

- By default, the person who creates the price book owns it.
- To change owner, click the **Change** link in the Price Book Owner field and select another user.
To create price books instantly
1. Click the Price Books tab.
2. On the left pane of the Home page, select Price Books from the Quick Create list.
3. Enter the relevant details.
4. Click Save.

To create duplicate price books
1. In the Price Books module, click a particular record that you want to be duplicate.
2. In the Price Books Details page, click Clone.
3. In the Clone Price Books page, modify the required details.
4. Click Save.

Set up Volume Discounts
While creating price book information, you have an option to choose your Pricing Model based on your business requirement. You can choose from the following options:

- No discount
- Flat Discount
- Differential Discount

To define the pricing model with no discount
1. In the Price Books module, click New Price Book.
2. In the Create Price Book page, enter a Price Book Name.
3. Select Pricing Model from the drop down list.
   By default, the Pricing Model displayed is None.
4. Click Save.

To define the pricing model with Flat/Differential discount
1. In the Price Books module, click New Price Book.
2. In the Create Price Book page, enter a Price Book Name.
3. Select **Flat/Differential** discount from the drop down list
4. In the *Pricing Details* section, enter the **From Range**, **To Range** and **Discount (%)**.
5. Click **Add** to enter more slots of pricing details and discounts.
6. Click **Save**.
The chart below shows a comparative study of the Flat & Differential discounts:

### Associate Price Book with Other Records

You can create a 360-degrees view of the product to display all the associated details, such as products, trouble tickets, open activities, history of the completed activities, attachments, and notes.

**To attach documents**

This feature enables you to attach documents, spreadsheets and presentations to the price book. You can attach them in the following ways:

- Attach from Desktop
- Attach from Zoho Docs
- Attach from Google Docs

**To add products**

1. In the *Price Book Details* page, the existing product details, if any, are displayed.

   - Click *Product Name*, *Product Code*, *Product Active*, *Manufacturer*, *Support Start Date*, or *Support Expiry Date* links to sort the display order of the records.
   - Click the relevant *Del* link to delete the record.
2. Click **Add Product**.
3. Select the check box(es) corresponding to the product.
   Note, that the products will be available in the list only if you add them using the Products module.
4. Click **Add to Price Book**.
In This Section:

- Create Vendors
- Associate to Other Records
CHAPTER 14

VENDOR MANAGEMENT

Vendors include companies, people, and contractors from which your company gets products and services. They can be either direct manufacturers or resellers. In the Zoho CRM system typical vendor selection process involves the following steps:

- Evaluate your business needs and create requirements document (RFI/RFP).
- Collect information about vendors from Trade Magazines, Yellow Pages, Advertisements, referrals, and other channels.
- Send RFI (request for information) to vendors and scrutinize the primary list of vendors based on their response to your RFI.
- Send RFP (request for proposals) to selected list of vendors.
- Evaluate vendors based on the response to your RFP, conduct vendor interviews and short-list the vendors.
- Gather required information, such as product details, communication channel, product delivery process and others from the short listed vendors.
- In Zoho CRM - Vendors module, create vendor information, such as business address of the vendor, contact information of the persons you are dealing with, products supplied/to be supplied, purchase orders for the shipments, activities related to vendors and others. In addition, you can also attach the important documents related to each vendor.
- Periodically update the vendors’ details and products purchased so that you can have a better visibility on your vendors/suppliers for the future procurement.

Availability

<table>
<thead>
<tr>
<th>Editions</th>
<th>Enterprise</th>
<th>Professional</th>
<th>Free</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enterprise</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
</tr>
<tr>
<td>Professional</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
</tr>
<tr>
<td>Free</td>
<td>NO</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Create Vendors

In Zoho CRM, you can store vendor details by entering data in vendor details form.

In the Vendor Edit form, you need to specify the vendor details. The following table provides descriptions of the various fields in the form.
List of Standard Vendor-related Fields

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
<th>Data Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vendor Name*</td>
<td>Specify the name of the vendor. This field is mandatory</td>
<td>Text box, alphanumeric (50)</td>
</tr>
<tr>
<td>Phone</td>
<td>Specify the phone number of the vendor</td>
<td>Text box, alphanumeric (40)</td>
</tr>
<tr>
<td>E-mail</td>
<td>Specify the E-mail ID of the vendor</td>
<td>Check box</td>
</tr>
<tr>
<td>Website</td>
<td>Specify the Web site URL of the vendor</td>
<td>Text box, decimal ()</td>
</tr>
<tr>
<td>GL Account</td>
<td>Select the general ledger account</td>
<td>Pick List</td>
</tr>
<tr>
<td>Category</td>
<td>Specify the category of the vendor</td>
<td>Text box, alphanumeric (40)</td>
</tr>
<tr>
<td>Vendor Address</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Street</td>
<td>Specify the address of the vendor</td>
<td></td>
</tr>
<tr>
<td>City</td>
<td></td>
<td></td>
</tr>
<tr>
<td>State</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Postal Code</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Country</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Description</td>
<td>Specify any other details about vendor</td>
<td>Text area (long text)</td>
</tr>
</tbody>
</table>

Create Vendors Individually

- You can create vendors individually by:
- Filling details in the vendor creation form.
- Using Quick Create option; a quick create component present in the left pane of the Vendors Home page.
- Duplicating the vendor with few changes in the existing vendor details

**To create vendors individually**

1. In the **Vendors** module, click **New Vendor**.
2. In the Create Vendor page, enter the vendor details.
3. Click Save.

To create vendors instantly
1. Click the Vendors tab.
2. On the left pane of the Home page, select Vendors from the Quick Create list.
3. Enter the relevant details.
4. Click Save.

To create duplicate records of vendors
1. In the Vendors tab, click a particular vendor that you want to be duplicated.
2. In the Vendor Details page, click Clone.
3. In the Clone Vendor page, modify the required details.
4. Click Save.

Associate Vendor with Other Records
You can create a 360-degrees view of the vendor to display all the associated details, such as products, activities, contacts, and purchase orders.

- **Products**: To add products that are purchased from vendor
- **Purchase Orders**: To create purchase orders for getting products from the vendors
- **Open Activities**: To add new tasks and events.
- **Closed Activities**: To track closed tasks and events.
- **Attachments**: To add files to the vendor record.
- **Contacts**: To add contacts related to vendors.

To attach documents
This feature enables you to attach documents, spreadsheets and presentations to the vendor. You can attach them in the following ways:

- Attach from Desktop
- Attach from Zoho Docs
- Attach from Google Docs
To add products

1. In the Vendor Details page, the existing product details, if any, are displayed.
   - Click Product Name, Product Code, Product Active, Manufacturer, Support Start Date, or Support Expiry Date links to sort the display order of the records.
   - Click the relevant Del link to delete the record.
2. Click New.
3. In the Create Products page, specify the product details.
4. Click Save.

To create tasks or events

1. In the Vendor Details page, the existing task or event details, if any, are displayed.
   - Click Subject, Activity Type, Status, Due Date or Owner Name links to sort the display order of the records.
   - Click the relevant Edit, Del, or Close link to modify, delete, or close the task respectively.
2. Click New Task/New Event/Log a Call and specify the relevant details.

Note: Once the activity is over, you can close the activity using the Close link.

To create purchase orders

1. In the Vendor Details page, the existing purchase order details, if any, are displayed.
   - Click Subject, Status, Tracking Number, Due Date, Excise Date, or Sales Commission links to sort the display order of the records.
   - Click the relevant Edit or Del link to modify or delete the purchase orders respectively.
2. Click New.
3. In the Create Purchase Orders page, specify the purchase order details.
4. Click Save.

To create contacts

1. In the Vendor Details page, the existing contact details, if any, are displayed.
   - Click Contact Name, Email, Phone, Mobile, or Fax links to sort the display order of the records.
- Click the relevant **Edit** or **Del** link to modify or delete the contacts respectively.

2. Click **New**.

3. In the *Create Contacts* page, specify the contact details.

4. Click **Save**.
In This Section:

- Create Quotes
- Associate to Other Records
CHAPTER 15
QUOTE MANAGEMENT

Sales Quotes are legally binding agreement between customer and vendor to deliver customer requested products in a specified time-frame at a predefined price. Your customers can place orders within the stipulated period (validity date) that has been specified in the quote otherwise you may cancel the quote or send a new quote extending the time-frame. In general, Sales Quote contains the Quote number, date, line items (products) including the quantities and prices based on your Price Books, Terms & Conditions and others. In Zoho CRM you can create a quote directly from the potential or from the account page.

Availability

<table>
<thead>
<tr>
<th>Editions</th>
<th>Enterprise</th>
<th>Professional</th>
<th>Free</th>
</tr>
</thead>
<tbody>
<tr>
<td>YES</td>
<td>YES</td>
<td>NO</td>
<td></td>
</tr>
</tbody>
</table>

| Permission Required | Quotes Tab |

Create Quotes

In Zoho CRM, you can store quote details by entering data in quote details form.

In the Quote Edit form, you need to specify the quote details. The following table provides descriptions of the various fields in the form.

List of Standard Quote-related Fields

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
<th>Data Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quote Owner</td>
<td>Select the name of the user to whom the quote is assigned.</td>
<td>Lookup</td>
</tr>
<tr>
<td>Subject*</td>
<td>Specify the name of the quote. This field is mandatory.</td>
<td>Text box, alphanumeric (50)</td>
</tr>
<tr>
<td>Potential Name</td>
<td>Specify the potential name for which the quote has to be created.</td>
<td>Text box, alphanumeric (40)</td>
</tr>
<tr>
<td>Quote Stage</td>
<td>Specify the status of the quote.</td>
<td>Check box</td>
</tr>
<tr>
<td>Valid Till</td>
<td>Specify the date till the quote is valid after sending to the prospective customer.</td>
<td>Date</td>
</tr>
<tr>
<td>Field Name</td>
<td>Description</td>
<td>Data Type</td>
</tr>
<tr>
<td>-----------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>--------------------</td>
</tr>
<tr>
<td>Quote Owner</td>
<td>Select the name of the user to whom the quote is assigned.</td>
<td>Lookup</td>
</tr>
<tr>
<td>Contact Name</td>
<td>Specify the contact to which the quote has to be created.</td>
<td>Lookup</td>
</tr>
<tr>
<td>Team</td>
<td>Specify the team name</td>
<td>Text box</td>
</tr>
<tr>
<td>Carrier</td>
<td>Select the name of the carrier manufacturer.</td>
<td>Pick list</td>
</tr>
<tr>
<td><strong>Account Name</strong></td>
<td>Specify the account name to which the quote has to be created.</td>
<td>Lookup</td>
</tr>
<tr>
<td>Billing Address*</td>
<td>Specify the billing address of the account or contact to which the quote has to be sent. If you have selected the account or contact, the corresponding billing address is automatically filled up.</td>
<td>Text box, alphanumeric (256)</td>
</tr>
<tr>
<td>Shipping Address*</td>
<td>Specify the shipping address of the account or contact to which the shipment has to be sent. If you have already selected the account or contact, the corresponding shipping address is automatically filled up.</td>
<td>Text box, alphanumeric (256)</td>
</tr>
<tr>
<td><strong>Product Details</strong></td>
<td>Specify the line items of the quote.</td>
<td></td>
</tr>
<tr>
<td>Product</td>
<td>Select the product name.</td>
<td>Lookup</td>
</tr>
<tr>
<td>Product Description</td>
<td>Enter a description for the product</td>
<td>Text</td>
</tr>
<tr>
<td></td>
<td>Note for existing Users: This enhancement will come into effect, only if you initially save the Edit Page Layout for Quotes.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Click Setup &gt; Quote Settings &gt; Edit Page Layout, and then click Save.</td>
<td></td>
</tr>
<tr>
<td>Quantity</td>
<td>Specify the number of units.</td>
<td>Numeric (Integer)</td>
</tr>
<tr>
<td>Unit Price</td>
<td>Displays the unit price of the product.</td>
<td>Alphanumeric</td>
</tr>
<tr>
<td>List Price</td>
<td>Select the product list price from Price Book or specify the product price.</td>
<td>Numeric</td>
</tr>
<tr>
<td>Total</td>
<td>Displays the amount of the selected products.</td>
<td>Alphanumeric</td>
</tr>
<tr>
<td>Terms &amp; Conditions</td>
<td>Specify the terms and conditions that are associated with quote.</td>
<td>Text area (32,000)</td>
</tr>
<tr>
<td>Description</td>
<td>Specify any other details about quote.</td>
<td>Text area (32,000)</td>
</tr>
</tbody>
</table>
To create quotes

1. In the Quotes module, click New Quote.
2. In the Create Quotes page, enter the quotes details.
3. Click Save.

To create duplicate quotes

1. In the Quotes tab, click a particular quote that you want to be duplicated.
2. In the Quote Details page, click Clone.
3. In the Clone Quotes page, modify the required details.
4. Click Save.

Associate Quotes with Other Records

You can create a 360-degrees view of the quote to display all the associated details, such as sales orders, open activities, and history of the completed activities.

- **Sales Orders**: To display sales orders associated with quotes.
- **Open Activities**: To add tasks and events related to quotes.
- **Closed Activities**: To display the completed activities.
- **Attachments**: To attach documents.
- **Emails**: To view e-mail messages.

To attach documents

This feature enables you to attach documents, spreadsheets and presentations to the quotes. You can attach them in the following ways:

- Attach from Desktop
- Attach from Zoho Docs
- Attach from Google Docs

To create tasks or events

1. In the Quote Details page, the existing task or event details, if any, are displayed.
   - Click Subject, Activity Type, Status, Due Date or Owner Name links to sort the display order of the records.
   - Click the relevant Edit, Del, or Close link to modify, delete, or close the task respectively.
2. Click **New Task/New Event/Log a Call** and specify the relevant details.

**Note:** Once the activity is over, you can close the activity using the **Close** link.

**To create sales orders**

1. In the **Quote Details** page, the existing sales order details, if any, are displayed.
2. Click **Subject**, **Status**, **Customer No.**, **Due Date**, **Excise Date**, or **Sales Commission** links to sort the display order of the records.
3. Click the relevant **Edit** or **Del** link to modify or delete the sales orders respectively.
4. Click **New**.
5. Enter the sales order details.
6. Click **Save**.

**Convert Quote to Sales Order/Invoice**

**To convert quotes to sales order/Invoice**

1. Click the **Quotes** tab.
2. In the **Quotes Home** page, select the required quote.
3. In the **Quote Details** page, click **Convert**, and then select **Sales Order/Invoice**.
   
   The Sales Order/Invoice Details page will be displayed.
In This Section:

- Create Sales Orders
- Associate to Other Records
Sales Order is a confirmation document sent to the customers before delivering the goods/services. Sales Order (SO) can be created once the quote is accepted by your prospective customer (potential) and the Purchase Order (PO) is sent by the customer for further processing. After receiving the PO, some of the customers may request SOs to know the exact date of delivery of the goods/services. Also the inventory/production department looks at the list of Sales Orders to see what needs to be shipped out and when. After the order is shipped and delivered to the customer an invoice is generated from the sales order for billing purposes. In general SO contains the SO number, date, line items (products) including the quantities and prices based on PO, Billing address, Shipping address, Terms & Conditions and others.

Availability

<table>
<thead>
<tr>
<th>Editions</th>
<th>Enterprise</th>
<th>Professional</th>
<th>Free</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>YES</td>
<td>YES</td>
<td>NO</td>
</tr>
</tbody>
</table>

Create Sales Orders

In Zoho CRM, you can store sales order details by entering data in sales order details form.

In the Sales Order Edit form, you need to specify the sales order-related information. The following table provides description of the various fields in the form.

List of Standard Sales Order-related Fields

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
<th>Data Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subject*</td>
<td>Specify the name of the sales order. This field is mandatory.</td>
<td>Text box, alphanumeric (50)</td>
</tr>
<tr>
<td>Potential Name</td>
<td>Select the potential for which the sales order has to be generated.</td>
<td>Select option</td>
</tr>
<tr>
<td>Customer No</td>
<td>Specify the customer identification number (if any)</td>
<td>Text box, alphanumeric (50)</td>
</tr>
<tr>
<td>Purchase Order</td>
<td>Select the reference purchase order.</td>
<td>Text box</td>
</tr>
<tr>
<td>Quote Name</td>
<td>Select the reference quote.</td>
<td>Select option</td>
</tr>
<tr>
<td>Field Name</td>
<td>Description</td>
<td>Data Type</td>
</tr>
<tr>
<td>------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>--------------------------------</td>
</tr>
<tr>
<td>Contact Name</td>
<td>Select the contact for which the sales order has to be generated.</td>
<td>Select option</td>
</tr>
<tr>
<td>Due Date</td>
<td>Select the date</td>
<td>Date</td>
</tr>
<tr>
<td>Carrier</td>
<td>Select the carrier’s name that ships the products from your warehouse to customer site.</td>
<td>Pick list</td>
</tr>
<tr>
<td>Pending</td>
<td></td>
<td>Text box, alphanumeric (50)</td>
</tr>
<tr>
<td>Status</td>
<td>Specify the status of the sales order.</td>
<td>Check box</td>
</tr>
<tr>
<td>Sales Commission</td>
<td>Specify the commission to the sales person upon closing the deal.</td>
<td>Numeric (float)</td>
</tr>
<tr>
<td>Excise Duty</td>
<td>Specify the excise duty for the shipment</td>
<td>Text box, numeric</td>
</tr>
<tr>
<td>Account Name*</td>
<td>Specify the account name to which the sales order has to be created.</td>
<td>Select option</td>
</tr>
<tr>
<td>Assigned To</td>
<td>Select the Zoho CRM user name to whom the sales order handling duty is assigned.</td>
<td>Select option</td>
</tr>
<tr>
<td>Billing Address *</td>
<td>Specify the billing address of the account or contact to which the sales order has to be sent. If you have selected the account or contact the billing address is automatically filled up.</td>
<td>Text box, alphanumeric (256)</td>
</tr>
<tr>
<td>Shipping Address *</td>
<td>Specify the shipping address of the account or contact to which the shipment has to be sent. If you have already selected the account or contact the shipping address is automatically filled up.</td>
<td>Text box, alphanumeric (256)</td>
</tr>
<tr>
<td>Product Details</td>
<td>Specify the line items of the sales order.</td>
<td></td>
</tr>
<tr>
<td>Product *</td>
<td>Select the product name.</td>
<td>Select option</td>
</tr>
</tbody>
</table>
### Field Name | Description | Data Type
---|---|---
Product Description | Enter a description for the product. Note For Existing Users: This enhancement will come into effect, only if you initially save the Edit Page Layout for Sales Orders. | Text
- Click Setup > Sales Order Settings > Edit Page Layout, and then click Save.
Quantity in Stock | Displays the stock quantity. | Numeric (Integer)
Quantity* | Specify the quantity for which the sales order has to be generated | Numeric (Integer)
Unit Price | Displays the unit price of the product. | Currency
List Price* | Select the product list price from Price Book or specify the product price. | Lookup and Numeric (Integer)
Tax | Specify the tax component of the products | Currency
Adjustments | Specify if there are any adjustments, such as discounts, or extra charges etc. | Currency
Total | Displays the amount of the selected line item. | Currency
Terms & Conditions | Specify the terms and conditions that are associated with sales order. | Text area (long text)
Description | Specify any other details about sales order. | Text area (long text)

**To create sales orders**

1. In the Sales Orders module, click New Sales Order.
2. In the Create Sale Orders page, enter the details.
3. Click Save.
To create duplicate sales order
   1. In the Sales Orders tab, click a particular sales order that you want to be duplicated.
   2. In the Sale Order Details page, click Clone.
   3. In the Clone Sale Orders page, modify the required details.
   4. Click Save.

Associate Sales Order with Other Records
You can associate the sales order with other records such as, activities, attachments and notes.

To attach documents
This feature enables you to attach documents, spreadsheets and presentations to the sales orders. You can attach them in the following ways:

- Attach from Desktop
- Attach from Zoho Docs
- Attach from Google Docs

To create tasks or events
   1. In the Sales Order Details page, the existing task or event details, if any, are displayed.

      - Click Subject, Activity Type, Status, Due Date or Owner Name links to sort the display order of the records.
      - Click the relevant Edit, Del, or Close links to modify, delete, or close the task respectively.

   2. Click New Task/New Event/Log a Call and specify the relevant details

      Note: Once the activity is over, you can close the activity using the Close link.

To create invoices
   1. In the Sales Order Details page, the existing invoice details, if any, are displayed.

      - Click Subject, Status, Invoice Date, Due Date, Excise Duty, or Sales Commission links to sort the display order of the records.
      - Click the relevant Edit or Del link to modify or delete the invoices respectively.

   2. Click New.
3. Enter the invoice details.
4. Click Save.
In This Section:

- Create Purchase Orders
- Associate to Other Records
Purchase Order is an order placed for procuring products or services from your short listed vendors. It is a legal binding document that protects interests of both vendor and buyers, which can be used as legal binding document for both parties. In general, PO contains the PO number, date, line items (products) including the quantities and prices based on Sales Quote, Billing address, Shipping address, Terms & Conditions and others.

You can use the PO for communicating your product and pricing requirements to vendors so that there will not be any obligations in future. Also, you can use the PO to cross-check the products shipped to your shipping address and invoices sent to your billing address. In addition, your vendor can use PO as legal document in the event of nonpayment in a court of law for claiming damages from your side.

### Availability

<table>
<thead>
<tr>
<th>Editions</th>
<th>Enterprise</th>
<th>Professional</th>
<th>Free</th>
</tr>
</thead>
<tbody>
<tr>
<td>YES</td>
<td>YES</td>
<td>NO</td>
<td></td>
</tr>
</tbody>
</table>

| Permission Required | Purchase Order Tab |

### Create Purchase Orders

In the Zoho CRM system, you can store purchase order details by entering data into the Purchase Order form.

In the Purchase Order Edit form, you need to specify the purchase order-related information. The following table provides descriptions of the various fields in the form.

#### List of Standard Purchase Order-related Fields

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
<th>Data Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subject*</td>
<td>Specify the name of the purchase order. This field is mandatory.</td>
<td>Text box, alphanumeric (50)</td>
</tr>
<tr>
<td>Sales Order</td>
<td>Select the reference Sales order.</td>
<td>Select option</td>
</tr>
<tr>
<td>Customer No</td>
<td>Specify the customer identification number (if any)</td>
<td>Text box, alphanumeric (50)</td>
</tr>
<tr>
<td>Field Name</td>
<td>Description</td>
<td>Data Type</td>
</tr>
<tr>
<td>-------------------------</td>
<td>------------------------------------------------------------------------------</td>
<td>------------------------------------</td>
</tr>
<tr>
<td>Purchase Order Date</td>
<td>Specify the date on which purchase order is created.</td>
<td>Date</td>
</tr>
<tr>
<td>Due Date</td>
<td>Select the due date.</td>
<td>Date</td>
</tr>
<tr>
<td>Sales Commission</td>
<td>Specify the commission to the sales person upon closing the deal.</td>
<td>Numeric (float)</td>
</tr>
<tr>
<td>Account Name *</td>
<td>Specify the account name to which the purchase order has to be created.</td>
<td>Select option</td>
</tr>
<tr>
<td>Status</td>
<td>Specify the status of the purchase order.</td>
<td>Check box</td>
</tr>
<tr>
<td>Account Name *</td>
<td>Specify the account name to which the purchase order has to be created.</td>
<td>Select option</td>
</tr>
<tr>
<td>Assigned To*</td>
<td>Select the Zoho CRM user name to whom the purchase order handling duty is assigned.</td>
<td>Select option</td>
</tr>
<tr>
<td>Billing Address *</td>
<td>Specify the billing address of the account or contact to which the purchase order has to be sent. If you have selected the account or contact the billing address is automatically filled up.</td>
<td>Text box, alphanumeric (256)</td>
</tr>
<tr>
<td>Shipping Address *</td>
<td>Specify the shipping address of the account or contact to which the shipment has to be sent. If you have already selected the account or contact the shipping address is automatically filled up.</td>
<td>Text box, alphanumeric (256)</td>
</tr>
<tr>
<td>Product Details</td>
<td>Specify the line items of the purchase order.</td>
<td></td>
</tr>
<tr>
<td>Product</td>
<td>Select the product name.</td>
<td>Select option</td>
</tr>
<tr>
<td>Product Description</td>
<td>Enter a description for the product. Note for Existing Users: This enhancement will come into effect, only if you initially save the Edit Page Layout for Purchase Orders.</td>
<td>Text</td>
</tr>
<tr>
<td></td>
<td>• Click Setup &gt; Purchase Order Settings &gt; Edit Page Layout, and then click Save.</td>
<td></td>
</tr>
<tr>
<td>Quantity</td>
<td>Specify the number of units.</td>
<td>Numeric (Integer)</td>
</tr>
<tr>
<td>Unit Price</td>
<td>Displays the unit price of the product.</td>
<td></td>
</tr>
<tr>
<td>List Price</td>
<td>Select the product list price from Price Book or specify the product price</td>
<td>Lookup and Numeric (Integer)</td>
</tr>
<tr>
<td>Field Name</td>
<td>Description</td>
<td>Data Type</td>
</tr>
<tr>
<td>---------------------</td>
<td>-------------------------------------------------------</td>
<td>-----------</td>
</tr>
<tr>
<td>Total</td>
<td>Displays the amount of the selected products.</td>
<td></td>
</tr>
<tr>
<td>Terms &amp; Conditions</td>
<td>Specify the terms and conditions that are associated with purchase order.</td>
<td>Text area</td>
</tr>
<tr>
<td>Description</td>
<td>Specify any other details about purchase order.</td>
<td>Text area</td>
</tr>
</tbody>
</table>

**To create purchase orders**

1. In the **Purchase Orders** module, click **New Purchase Order**.
2. In the **Create Purchase Order** page, enter the related information.
3. Click **Save**.

**Associate Purchase Order with Other Records**

By default, you can associate the purchase order with other records such as, activities, attachments, and notes.

**To attach documents**

This feature enables you to attach documents, spreadsheets and presentations to the purchase order. You can attach them in the following ways:

- Attach from Desktop
- Attach from Zoho Docs
- Attach from Google Docs

**To create tasks or events**

1. In the **Purchase Order Details** page, the existing task or event details, if any, are displayed.

   - Click **Subject, Activity Type, Status, Due Date or Owner Name** links to sort the display order of the records.

   - Click the relevant **Edit, Del, or Close** link to modify, delete, or close the task respectively.

2. Click **New Task/New Event/Log a Call** and specify the relevant details

**Note:** Once the activity is over, you can close the activity using the **Close** link.
CHAPTER 18

INVOICE MANAGEMENT

In This Section:

- Create Invoices
- Associate to Other Records
Once the sales stage reaches to final stage you may start working on payment procedure. In this regard Invoice plays a vital role, which is very important for both Sales and Accounting purposes. Invoice is a bill issued by the vendor to the customers along with the goods/services shipment. It usually contains reference number of Purchase Order, Date, Billing Address, Shipping Address, Terms of Payment, Line Items (products/services) with quantities and prices, and others. In a typical organization, invoicing completes the sales process and begins the accounting process where account receivable is managed by Accounts/Finance teams.

In Zoho CRM, you can create invoices directly from the Potentials, Accounts, Quotes, or Sales Order.

### Availability

<table>
<thead>
<tr>
<th>Editions</th>
<th>Enterprise</th>
<th>Professional</th>
<th>Free</th>
</tr>
</thead>
<tbody>
<tr>
<td>YES</td>
<td>YES</td>
<td>NO</td>
<td></td>
</tr>
</tbody>
</table>

| Permission Required | Invoice Tab |

### Create Invoices

In Zoho CRM, you can create invoices by entering data in the Invoice details form.

In the Invoice Edit form, you need to specify the invoice-related information. The following table provides descriptions of the various fields in the form.

### List of Standard Invoice-related Fields

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
<th>Data Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subject*</td>
<td>Specify the name of the invoice. This field is mandatory.</td>
<td>Text box, alphanumeric (50)</td>
</tr>
<tr>
<td>Sales Order</td>
<td>Select the reference Sales order (if any).</td>
<td>Lookup</td>
</tr>
<tr>
<td>Customer No</td>
<td>Specify the customer identification number (if any).</td>
<td>Text box, alphanumeric (50)</td>
</tr>
<tr>
<td>Field Name</td>
<td>Description</td>
<td>Data Type</td>
</tr>
<tr>
<td>----------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>--------------------------------</td>
</tr>
<tr>
<td>Invoice Date</td>
<td>Specify the date on which the invoice is created.</td>
<td>Date</td>
</tr>
<tr>
<td>Due Date</td>
<td>Specify the invoice due date as per your payment terms.</td>
<td>Date</td>
</tr>
<tr>
<td>Sales Commission</td>
<td>Specify the commission to the sales person upon closing the deal.</td>
<td>Numeric (float)</td>
</tr>
<tr>
<td>Account Name *</td>
<td>Specify the account name to which the invoice has to be created.</td>
<td>Lookup</td>
</tr>
<tr>
<td>Status</td>
<td>Specify the status of the invoice.</td>
<td>Check box</td>
</tr>
<tr>
<td>Account Name *</td>
<td>Specify the account name to which the invoice has to be created.</td>
<td>Lookup</td>
</tr>
<tr>
<td>Assigned To*</td>
<td>Select the Zoho CRM user name to whom the invoice handling duty is assigned.</td>
<td>Lookup</td>
</tr>
<tr>
<td>Billing Address *</td>
<td>Specify the billing address of the account or contact to which the invoice has to be sent. If you have selected the account or contact the billing address is automatically filled up.</td>
<td>Text box, alphanumeric (256)</td>
</tr>
<tr>
<td>Shipping Address *</td>
<td>Specify the shipping address of the account or contact to which the shipment has to be sent. If you have already selected the account or contact the shipping address is automatically filled up.</td>
<td>Text box, alphanumeric (256)</td>
</tr>
<tr>
<td>Product Details</td>
<td>Specify the line items of the invoice.</td>
<td></td>
</tr>
<tr>
<td>Product*</td>
<td>Select the product name.</td>
<td>Lookup</td>
</tr>
<tr>
<td>Product Description</td>
<td>Enter a description for the product Note For Existing Users: This enhancement will come into effect, only if you initially save the Edit Page Layout for Invoices. Click Setup &gt; Invoice Settings &gt; Edit Page Layout, and then click Save.</td>
<td>Text</td>
</tr>
</tbody>
</table>
## Create Invoice Individually

You can create invoices individually by:

- Filling details in the invoice creation form.
- Duplicating the invoices with few changes in the existing invoice details.

### To create invoices individually

1. In the **Invoices** module, click **New Invoice**.
2. In the **Create Invoice** page, enter the invoice details.
3. Click **Save**.

### To create duplicate invoices

1. In the **Invoices** tab, click a particular invoice that you want to be duplicated.
2. In the **Invoice Details** page, click **Clone**.
3. In the **Clone Invoice** page, modify the required details.
4. Click **Save**.

## Associate Invoices with Other Records

You can associate invoice with the other records such as, activities, attachments and notes.
To attach documents
This feature enables you to attach documents, spreadsheets and presentations to the invoices. You can attach them in the following ways:

- Attach from Desktop
- Attach from Zoho Docs
- Attach from Google Docs

To create tasks or events
1. In the Invoice Details page, the existing task or event details, if any, are displayed.
   - Click Subject, Activity Type, Status, Due Date or Owner Name links to sort the display order of the records.
   - Click the relevant Edit, Del, or Close link to modify, delete, or close the task respectively.
2. Click New Task/New Event/Log a Call and specify the relevant details

Note: Once the activity is over, you can close the activity using the Close link.
In This Section:

- Customer Support in ZCRM
In This Section:

- Introduction to Customer Support
Zoho CRM provides the Customer Support & Service management (Help Desk) features, such as Cases ( Trouble tickets ), Solutions ( Knowledge base ), Case Routing & escalation through Workflow rules, and easy to deploy Web-to-Case forms for capturing customer-specific cases through Websites. In addition, you can also synchronize customer-specific e-mail messages as Cases from Microsoft Outlook mail client to Cases module in Zoho CRM. 

Cases and Solutions functionality can be used to streamline organization-wide Customer Support process and enable a better integration between Sales & Customer Support processes in a single system. Integration between Sales and Post-sales support management helps organizations in resolving the customer reported cases in a least possible time, thereby enhance the customer satisfaction and more cross-selling and up-selling opportunities in future.

<table>
<thead>
<tr>
<th>Case Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cases refer to the feedback received from the customers on various issues pertaining to the use of products or services.</td>
</tr>
<tr>
<td>Create Cases</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Solution Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>Solutions refer to the resources within the organization that enables solving repetitive problems encountered by customers.</td>
</tr>
<tr>
<td>Create Solutions</td>
</tr>
</tbody>
</table>
In This Section:

- Create Cases
- Associate to Other Records
- Approve Cases
- Assignment Rules
- Escalation Rules
In the world of Internet, online Customer Support has became an integral part of the organizations' business process. Customer Support is becoming an important activity in retaining all types of products and service industries. In general, case trouble tickets are used to capture the customer feedback on various types of problems that arise after purchasing product/service from your company. Sometimes customers may provide some good feature requests that may be useful during future product/service enhancements.

### Availability

<table>
<thead>
<tr>
<th>Editions</th>
<th>Enterprise</th>
<th>Professional</th>
<th>Free</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Permission Required</th>
<th>Cases Tab</th>
</tr>
</thead>
</table>

### Typical Case Management Process

1. Customize the fields in Case page according to your organization's Customer Support process (You may use the existing fields, disable some of the fields, or add new custom fields).
2. Setup case generation process by filling the Case form, importing case data from external sources, or capturing cases directly from Website using Web-to-Case form.
3. Assign cases to the correct users using the workflow rules.
4. Follow-up cases till resolutions are sent to the customers.
5. Once the resolution is working fine, add the solution to the publicly accessible Solutions module for future reference.

In Zoho CRM, cases can be generated through telephone, E-mail, or Website. In addition, you can also generate cases from customer specific e-mails in Microsoft Outlook using the Zoho CRM Outlook Edition.

### Create Cases

In the Zoho CRM system, you can create cases by:
- Entering data manually into case details form
- Importing cases from external sources
- Capture cases from Website through Web-to-Case form
- Adding customer-specific e-mail message as case from Microsoft Outlook to Cases module

In the Case Edit form, you need to specify the case details. The following table provides descriptions of the various fields in the form.

List of Standard Case-related Fields

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
<th>Data Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Case Number</td>
<td>Displays the case ID after creating a case.</td>
<td>Numeric</td>
</tr>
<tr>
<td>Case Owner</td>
<td>Select the name of the Zoho CRM user to whom the Case is assigned.</td>
<td>Lookup</td>
</tr>
<tr>
<td>Subject*</td>
<td>Specify the title of the Case. This field is mandatory.</td>
<td>Text box, Alphanumeric (255)</td>
</tr>
<tr>
<td>Priority</td>
<td>Select the priority of the Case from the drop-down list.</td>
<td>Pick list</td>
</tr>
<tr>
<td>Status</td>
<td>Select the status of the Case from the drop-down list.</td>
<td>Pick list</td>
</tr>
<tr>
<td>Reported By</td>
<td>Displays the name of the contact.</td>
<td>-</td>
</tr>
<tr>
<td>Related To</td>
<td>Select the name of the contact who submitted the Case.</td>
<td>Lookup</td>
</tr>
<tr>
<td>Type</td>
<td>Select the type of problem. It can be a general question, feature request, or a real issue in your product/service.</td>
<td>Pick list</td>
</tr>
<tr>
<td>Case Origin</td>
<td>Select the source from which the case has been generated. You can select Email, Phone, or Website. If you select Email, you must specify the Email ID of the customer.</td>
<td>Pick list</td>
</tr>
<tr>
<td>Field Name</td>
<td>Description</td>
<td>Data Type</td>
</tr>
<tr>
<td>------------</td>
<td>-------------</td>
<td>-----------</td>
</tr>
<tr>
<td>Email</td>
<td>Specify the Email ID of the contact.</td>
<td>Email</td>
</tr>
<tr>
<td>Phone</td>
<td>Specify the phone number of the customer</td>
<td>Textbox</td>
</tr>
<tr>
<td>Case Reason</td>
<td>Specify the reason for the case</td>
<td>Pick list</td>
</tr>
<tr>
<td>No of comments</td>
<td>Displays the number of comments submitted during case resolution.</td>
<td>-</td>
</tr>
<tr>
<td>Potential Name</td>
<td>Displays the potential name</td>
<td></td>
</tr>
<tr>
<td>Description</td>
<td>Specify complete details about the case.</td>
<td>Text Area (32 KB)</td>
</tr>
<tr>
<td>Comments</td>
<td>Specify follow-up notes about case.</td>
<td>Text Area (32 KB)</td>
</tr>
</tbody>
</table>

Create Cases Individually

To create cases
1. In the Cases module, click New Case.
2. In the Create Case page, enter the case details.
3. Click Save.

To create cases instantly
1. Click the Cases tab.
2. On the left pane of the Home page, select Cases from the Quick Create list.
3. In the pop up window, enter the relevant details.
4. Click Save.

To create duplicate cases
1. Click the Cases tab, click a particular case that you want to be duplicated.
2. In the Case Details page, click Clone.
3. In the Clone Case page, modify the required case details.
4. Click **Save**.

**Note:**

- Before importing cases into Zoho CRM, you must have the case details in a CSV/XLS file.
- You must have privilege to import the cases in Zoho CRM.
- Before importing the cases into Zoho CRM close the CSV/XLS file and the Spreadsheet program.
- Remove apostrophe from any place in the CSV file (For example, ABC's).
- You can import a maximum of 1000 cases in one import cycle.

**Associate Case with Other Records**

You can create a 360-degrees view of the Case to display all the associated details, such as potentials, cases, open activities, history of the completed activities, attachments, and notes.

**To attach documents**

This feature enables you to attach documents, spreadsheets and presentations to the cases. You can attach them in the following ways:

- Attach from Desktop
- Attach from Zoho Docs
- Attach from Google Docs

**To add notes**

1. In the **Case Details** page, the existing note details, if any, are displayed.

   - Click **Title, Note Content, Modified Time, Created Time, or Owner Name** links to sort the display order of the records.
   - Click the relevant **Edit** or **Del** link to modify or delete the notes respectively.

2. Click **New Note** and do the following:
   a. Enter the **Note Title**. It is mandatory.
   b. The system displays the name of the lead's **Owner**. Click to change the owner's name.
   c. Enter the **Note Content** in the text box.

3. Click **Save**.
To create tasks or events

1. In the Case Details page, the existing task or event details, if any, are displayed.
   - Click Subject, Activity Type, Status, Due Date or Owner Name links to sort the display order of the records.
   - Click the relevant Edit, Del, or Close link to modify, delete, or close the task respectively.
2. Click New Task/New Event/Log a Call and specify the relevant details.

   Note: Once the activity is over, you can close the activity using the Close link.

Approve Cases Captured through Website

By default, cases captured through Website are assigned to one of the Customer Support Administrator who can update the cases with additional information and assign to the corresponding Support Agent in your organization. It will allow your Support Agents focus mainly on the cases assigned to them.

Availability

<table>
<thead>
<tr>
<th>Editions</th>
<th>Enterprise</th>
<th>Professional</th>
<th>Free</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Permission Required</th>
<th>Approve Web-to-Cases</th>
</tr>
</thead>
</table>

To approve cases from Website

1. Click the Cases tab.
2. In the Cases Home page, under Case Tools section, and click the Approve Cases link.
3. In the Case Approval page, select the cases for approval.
4. Click Approve.

Set up Case Assignment Rules

You can setup case assignment rules based on your organization-wide case distribution (based on product support) process so that cases generated through import tool are automatically assigned to the respective support agents.
Availability

<table>
<thead>
<tr>
<th>Editions</th>
<th>Enterprise</th>
<th>Professional</th>
<th>Free</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>YES</td>
<td>YES</td>
<td>NO</td>
</tr>
</tbody>
</table>

| Permission Required | Manage Cases Assignment Rules |

**Case Assignment Workflow**

1. Create case assignment rule.
2. Associate rule entries to the assignment rule, which contains matching criteria, selecting user, and adding default workflow task.
3. Select the required assignment rule in "case import tool"
4. During case importation, first assignment rule is evaluated and the cases are assigned to the Zoho CRM users according to the matching criteria.

**Limitations**

- You can create up to 20 different case assignment rules.
- In each assignment rule, you can associate up to 20 different criteria.
- Though you set multiple rules, users can select only one rule at a time.
- Case assignment rule can be used only for the cases generated through import tool and Web-to-Case form. You cannot assign cases to users if you are creating manually.

**To set up case assignment rules**

1. Click **Setup > Case Settings > Assignment Rules**.
2. In the **Case Assignment Rules** page, click **Create New Rule**.
3. In the **New Rule** page, enter the **Rule Name**, and then click **Save**.
4. Click **Create Rule Entry**.

5. In the **Rule Entry** page, do the following:

   - **Specify Criteria**: Select the matching criteria to evaluate the rule.
   - **Select User**: Select the user to whom the contact has to be assigned.
   - **Add Task**: Select the workflow task to be assigned.

6. Click **Save**.

**Set up Case Escalation Rules**

It often happens that the cases are not attended by the person to whom it is assigned. This option enables you to configure an escalation rule by which the cases are escalated to the other members in operational hierarchy, depending on the distribution rules of an organization.
Notes:

- At a time, you can activate only ONE Escalation Rule.
- If a newly created rule is set as active then the existing active rule will get deactivated.

Availability

<table>
<thead>
<tr>
<th>Editions</th>
<th>Enterprise</th>
<th>Professional</th>
<th>Free</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<td>NO</td>
<td>NO</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Permission Required</th>
<th>Configure Cases Escalation</th>
</tr>
</thead>
</table>

**To set the Case Escalation Rule**

- Enable the Escalation Scheduler
- Set up Case Escalation Rule
- Create Rule Entry
- Define Escalation Action for the Rule Entry

**Part 1 - Enable the Escalation Scheduler**

The Escalation Scheduler should be enabled prior to creating the Case Escalation Rule.

1. Click **Setup > Case Settings > Case Escalation Rules**.
2. In the **Case Escalation Rules** page, click **Enable Escalation Scheduler**.

**Note:** To disable Case Escalation Scheduler, click the **Close** link in the **Case Escalation Rules** page.

**Part 2 - Create Case Escalation Rule**

1. Click **Setup > Case Settings > Case Escalation Rules**.
2. In the **Case Escalation Rule Name** page, click **New Case Escalation Rule**.
3. In the **Create Case Escalation Rule Name** page, enter the **Case Escalation Rule Name**.
4. Select the **Active** check box.
5. Click **Save**.

**Note:**
- Activating any Rule, automatically deactivates the existing active Rule
Part 3 - Create Rule Entry

1. Click Setup > Case Settings > Case Escalation Rules
2. In the Case Escalation Rule Name page, select the case escalation rule name from the list.
   - Click Rename or Del link to rename or delete the corresponding rule respectively.
3. Click Create Rule Entry.
4. In the Rule Entry page, specify the criteria for the rule.
5. In the Rule Entry details, do the following:
   - Select your organization's Business Hours.
     Note, that you should have already defined the business hours.
6. Select the option from the list based on which the Escalation Time is set.
7. Click Save.

Note: Once the Rule Entries are created, you can click Reorder and specify the escalation order of the rules.

Part 4 - Define Escalation Action for the Rule Entry

1. In the Case Escalation Rule page, click the Rule Entries' criteria from the list.
2. In the Rule Entry page, the rule entry details are displayed.
3. Click New Escalation Action.
4. In the New Escalation Action page, do the following:
   a. Select the Age of Escalation Actions from the list.
   b. Select the person to whom the case needs to be escalated from the Escalate To pick list.
   c. Select the Escalate Template from the list.
   d. Select the owner for the escalation case from the pick list.
   e. Select the e-mail template from the list used to Notify Assignee.
   f. Enter the Additional Emails, if any.
5. Click Save.
In This Section:

- Create Solutions
- Associate to Other Records
Over a period, direct customer support helps your organization to build a rich knowledge base for future reference. Knowledge Base in the form of solutions (also called as articles or frequently asked questions) enables your organization in solving the repetitive problems encountered by customers with limited resources. Solutions module integrated with Cases is very useful for organizations that are mainly focusing on post-sales support, particularly technology and knowledge-based industries.

### Availability

<table>
<thead>
<tr>
<th>Editions</th>
<th>Enterprise</th>
<th>Professional</th>
<th>Free</th>
</tr>
</thead>
<tbody>
<tr>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td></td>
</tr>
</tbody>
</table>

### Create Solutions

In Zoho CRM, you can create solutions by:

- Entering data in solution details form
- Duplicating the solution with few changes from the existing details
- Importing solutions from other applications

In the Solutions Edit form, you need to specify the solutions details. The following table provides descriptions of the various fields in the form.

### List of Standard Solutions Fields

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
<th>Data Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Solution Title*</td>
<td>Specify the subject of the solution.</td>
<td>Text box, Alphanumeric (255)</td>
</tr>
<tr>
<td>Solution Owner</td>
<td>Select the Zoho CRM user's name to which the solution is assigned.</td>
<td>Pick list</td>
</tr>
<tr>
<td>Status</td>
<td>Select the status from the list</td>
<td>Pick list</td>
</tr>
<tr>
<td>Product</td>
<td>Select the name of the product to which the</td>
<td>Lookup</td>
</tr>
</tbody>
</table>
Create Solutions Individually

To create solutions individually
1. Click the Solutions tab, click New Solution.
2. In the Solutions Home page, enter the solution details.
3. Click Save.

To create solutions instantly
1. Click the Solutions tab.
2. On the left pane of the Home page, select Solutions from the Quick Create list.
3. Enter the relevant details.
4. Click Save.

To create duplicate solutions
1. Click the Solutions tab, click a particular solution that you want to be duplicated.
2. In the Solution Details page, click Clone.
3. In the Clone Solution page, modify the required solution details.
4. Click Save.

Note:
- Use the CSV/XLS file format.
- The import file should contain the header column to map the data with Zoho CRM.
Solution Management

- Disable the Sort filter in import file (In import file, disable the filter option by Data à Filter à AutoFilter).
- Before importing the solutions into Zoho CRM close the import file and the corresponding Spreadsheet program.
- Remove apostrophe if present anywhere in the import file.
- You can import a maximum of 1000 solutions in one import cycle.

**Attach Documents to the Solution**

You can attach additional documents to the solution.

**To attach documents**

This feature enables you to attach documents, spreadsheets and presentations to the solution. You can attach them in the following ways:

- Attach from Desktop
- Attach from Zoho Docs
- Attach from Google Docs
In This Section:

- Data Analytics in ZCRM
In This Section:

- Introduction to Data Analytics
Zoho CRM enables fully customizable reports in all the modules with more flexible options, such as cross-linking modules, arithmetic operations, different types of layouts, 3-level column grouping, public/private folders, scheduling reports generation and delivering to the intended users including non-Zoho CRM users through e-mail. In addition, 40 plus standard reports are packed in various modules, which can be used as a ready reference and enhance the learning experience.

Dashboards give a real-time snapshot of your organization's key metrics. Using dashboards you can easily visualize comparisons, patterns, and trends in sales, marketing, support, and inventory related data. The Zoho CRM solution dashboard comprises of different types of two-dimensional/three-dimensional (2D/3D) charts, which are generated dynamically built over the Macromedia Flash technology. The unique chart is the Funnel chart, which can be used to visualize the sales pipeline at various stages intuitively.

<table>
<thead>
<tr>
<th>Reports</th>
<th>Dashboards</th>
</tr>
</thead>
<tbody>
<tr>
<td>Presentation of data or records for various modules as per requirement.</td>
<td>A pictorial representation of your custom report data, which gives a real-time snapshot of your organization's key metrics.</td>
</tr>
<tr>
<td>Create Reports</td>
<td>Create Dashboards</td>
</tr>
</tbody>
</table>
In This Section:

- Create Reports
- Schedule Reports
- Delete Reports
- Export Reports
Zoho CRM reports are the detailed and informative list of records. Each report provides access to important data required for various purposes. In Zoho CRM, standard reports are provided in various modules, which can be either used as it is or customized further as per your business requirements.

### Availability

<table>
<thead>
<tr>
<th>Editions</th>
<th>Enterprise</th>
<th>Professional</th>
<th>Free</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
</tr>
</tbody>
</table>

#### Permissions Required

- Reports Tab

### View Reports

Zoho CRM provides more than 40 different standard reports for the users’ benefit. These reports are distributed across different modules in Zoho CRM. You can use the standard reports or customize them as per your business requirements.

### List of standard Reports

<table>
<thead>
<tr>
<th>Report Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account and Contact Reports</td>
<td></td>
</tr>
<tr>
<td>Contact Mailing List</td>
<td>Display the list of contact address details.</td>
</tr>
<tr>
<td>Key Accounts</td>
<td>Displays the accounts that give you more sales revenue.</td>
</tr>
<tr>
<td>Accounts by Industry</td>
<td>Displays the accounts from various industries.</td>
</tr>
<tr>
<td>Potential Reports</td>
<td></td>
</tr>
<tr>
<td>Pipeline by Stage</td>
<td>Displays the potentials by their stage.</td>
</tr>
<tr>
<td>Potentials Closing by this Month</td>
<td>Displays the potentials that are closing during the current month.</td>
</tr>
</tbody>
</table>
### Reports

<table>
<thead>
<tr>
<th><strong>Report Name</strong></th>
<th><strong>Description</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales Person's Performance Report</td>
<td>Displays the potentials gained by each sales person.</td>
</tr>
<tr>
<td>Lost Potentials</td>
<td>Displays the potentials that are lost.</td>
</tr>
<tr>
<td>Potentials by Type</td>
<td>Displays the potentials by their type.</td>
</tr>
<tr>
<td>Open Potentials</td>
<td>Displays the potentials that are pending.</td>
</tr>
<tr>
<td>Pipeline by Probability</td>
<td>Displays the pipeline of the potentials by their probability.</td>
</tr>
<tr>
<td>Sales By Lead Source</td>
<td>Displays the sales from various lead sources.</td>
</tr>
<tr>
<td>This Month Sales</td>
<td>Displays the sales that has happen during current month.</td>
</tr>
<tr>
<td>Today's Sales</td>
<td>Displays the sales that has happen today.</td>
</tr>
<tr>
<td>Stage Vs Potential Type Report</td>
<td>Displays the sales vs potentials report</td>
</tr>
</tbody>
</table>

#### Lead Reports

<table>
<thead>
<tr>
<th><strong>Lead Reports</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Leads By Source</td>
<td>Displays the leads from various sources.</td>
</tr>
<tr>
<td>Leads By Status</td>
<td>Displays the leads and their status.</td>
</tr>
<tr>
<td>Today's Leads</td>
<td>Displays the leads that are created today.</td>
</tr>
<tr>
<td>Leads by Ownership</td>
<td>Displays the leads and the corresponding owners.</td>
</tr>
<tr>
<td>Converted Leads</td>
<td>Displays the leads that are converted into Account / Potential / Contact.</td>
</tr>
<tr>
<td>Leads by Industry</td>
<td>Displays the leads from various vertical industries.</td>
</tr>
</tbody>
</table>

#### Activity Reports

<table>
<thead>
<tr>
<th><strong>Activity Reports</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Tasks and Events Report</td>
<td>Displays the list of all the tasks and events.</td>
</tr>
<tr>
<td>Today's Calls</td>
<td>Displays the list of current day's inbound and outbound calls.</td>
</tr>
</tbody>
</table>

#### Campaign Reports

<table>
<thead>
<tr>
<th><strong>Campaign Reports</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Campaigns Revenue Report</td>
<td>Display the revenue generated from the campaign.</td>
</tr>
<tr>
<td>Campaign Leads</td>
<td>Displays the leads that are generated through the campaign.</td>
</tr>
<tr>
<td>Report Name</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Case &amp; Solution Reports</strong></td>
<td></td>
</tr>
<tr>
<td>Popular Solutions</td>
<td>Displays the number of comments for solutions.</td>
</tr>
<tr>
<td>Cases By Origin</td>
<td>Displays the cases based upon their origin.</td>
</tr>
<tr>
<td>Cases By Status</td>
<td>Displays the cases based upon their status.</td>
</tr>
<tr>
<td>Cases By Priority</td>
<td>Displays the cases based upon their priorities.</td>
</tr>
<tr>
<td>Cases By Comments</td>
<td>Displays the cases with the number of comments count.</td>
</tr>
<tr>
<td><strong>Sales Forecast Reports</strong></td>
<td></td>
</tr>
<tr>
<td>Quarterly Forecast Summary</td>
<td>Displays the quarterly forecasts that includes committed amounts, best-case</td>
</tr>
<tr>
<td></td>
<td>amounts, and pipeline by quarter.</td>
</tr>
<tr>
<td>Forecast History Report</td>
<td>Displays the life cycle of the forecast.</td>
</tr>
<tr>
<td><strong>Product Reports</strong></td>
<td></td>
</tr>
<tr>
<td>Products by Category</td>
<td>Displays the products based upon their category.</td>
</tr>
<tr>
<td>Products by Support</td>
<td>Displays the products list whose support discontinued during the current</td>
</tr>
<tr>
<td>Termination date</td>
<td>month.</td>
</tr>
<tr>
<td>Products by Cases</td>
<td>Display the products and with the list of cases associated with the products.</td>
</tr>
<tr>
<td><strong>Vendor Reports</strong></td>
<td></td>
</tr>
<tr>
<td>Amount by Vendors</td>
<td>Displays the vendors based on the amount</td>
</tr>
<tr>
<td>Vendors Vs Purchases</td>
<td>Displays the vendors based on the purchases made from the vendors.</td>
</tr>
<tr>
<td><strong>Quote Reports</strong></td>
<td></td>
</tr>
<tr>
<td>Quotes by Accounts</td>
<td>Displays the quotes based on accounts.</td>
</tr>
<tr>
<td>Quotes by Stage</td>
<td>Displays the quotes based on their stages.</td>
</tr>
<tr>
<td><strong>Sales Order</strong></td>
<td></td>
</tr>
</tbody>
</table>
### Reports

<table>
<thead>
<tr>
<th>Report Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Reports</strong></td>
<td></td>
</tr>
<tr>
<td>Sales Orders by Accounts</td>
<td>Displays the sales orders based on accounts.</td>
</tr>
<tr>
<td>Sales Orders by Status</td>
<td>Displays the sales orders based on their status.</td>
</tr>
<tr>
<td>Sales Orders by Owner</td>
<td>Displays the sales orders based on their owners.</td>
</tr>
<tr>
<td><strong>Purchase Order Reports</strong></td>
<td></td>
</tr>
<tr>
<td>Contacts Vs Purchases</td>
<td>Displays the contacts based on purchases.</td>
</tr>
<tr>
<td>Purchase Orders by Status</td>
<td>Displays the purchase orders based on their status.</td>
</tr>
<tr>
<td><strong>Invoice Reports</strong></td>
<td></td>
</tr>
<tr>
<td>Invoices by Accounts</td>
<td>Displays the invoices based on their accounts.</td>
</tr>
<tr>
<td>Invoices by Status</td>
<td>Displays the invoices based on their status.</td>
</tr>
</tbody>
</table>

**Note:** You cannot delete the above standard reports.

To access standard reports in Reports tab click the specific report (For example, Contact Mailing List from the Accounts & Contacts Reports) from the Reports folder (for example, Accounts & Contacts Reports, Potentials reports, and others).

**To view the report**

1. Click the **Reports** tab.
2. In the *Reports Home* page, click the required reports' group.
3. From the list of reports that are displayed, click the required report's link.

4. Click the **Customize** link next to the report to customize the report.

5. In the *Reports* page, you can do the following:

   - **Export**: Use this option to export and save the report in Excel, PDF, or CSV format in your local disk.
   - **Save As**: Use this option to save the report with a new name. This option is useful when you filter a specific set of data and save it for future reference.
   - **Customize**: This feature is used to customize the report with regards to the report types, columns, grouping, filter criteria in the report, etc.
   - **Reload**: Use this option to update or refresh the contents of the page.
**Hide Details/Show Details**: Click Hide Details to hide the details of the report and click Show Details to see the hidden details of the report.

**Create Chart**: This feature enables you to create charts, (such as Bar diagrams, Pie charts, Line charts, Funnel charts) based on the selected report details.

6. Do one of the following, and then click Apply Filter to view reports based on the filter options specified:

- Select Last Created Time or Last Modified Time from the Column list.
- Select the option from the adjacent list. (Next FQ, for example). On selecting this option, the system will automatically display the Start and End date in the respective boxes.
- Enter the Start Date and the End Date in mm/dd/yyyy format, or select the date from the calendar displayed.

**Note**:

- FQ refers to Financial Quarter and FY refers to the Financial Year.
- You can view a maximum of 2000 records in a report.

**Create Reports**

You can create new module-specific reports linking some of the other cross-functional modules. For example, you can create a report in accounts module linking other modules such as Contacts, Potentials, Quotes, and others.

**List of Primary modules and the related Secondary modules**

In the Create Report form, you need to specify the primary module and the related secondary modules (optional). The following table provides various primary modules and the related secondary modules.

<table>
<thead>
<tr>
<th>Primary Module</th>
<th>Secondary Modules</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leads</td>
<td>None</td>
</tr>
<tr>
<td>Contacts</td>
<td>Accounts, Potentials, Quotes, and Orders</td>
</tr>
<tr>
<td>Accounts</td>
<td>Potentials, Contacts, Products, Quotes, and Invoices</td>
</tr>
</tbody>
</table>
### Types of Report

- **Tabular Report**: Displays the data without any subtotals in the report. Use this type of report to create contact mailing lists, consolidated view of sales pipeline, and others.

- **Summary Report**: Displays the data along with subtotals, groupings, and other summary information.

- **Matrix Report**: Displays the data summarized in a grid against both horizontal and vertical columns.

### Customize Reports

You can create new reports according to your organization's requirements. The customization of a report involves the following steps:

- Select the module and the corresponding cross-functional modules
- Select the report type (Tabular, Summary, or Matrix report)

<table>
<thead>
<tr>
<th>Primary Module</th>
<th>Secondary Modules</th>
</tr>
</thead>
<tbody>
<tr>
<td>Potentials</td>
<td>Accounts, Contacts, and Quotes</td>
</tr>
<tr>
<td>Activities</td>
<td>Contacts</td>
</tr>
<tr>
<td>Products</td>
<td>Accounts and Contacts</td>
</tr>
<tr>
<td>Cases</td>
<td>Products</td>
</tr>
<tr>
<td>Solutions</td>
<td>-</td>
</tr>
<tr>
<td>Quotes</td>
<td>Accounts, Contacts, and Potentials</td>
</tr>
<tr>
<td>Orders</td>
<td>Contacts</td>
</tr>
<tr>
<td>Invoice</td>
<td>Accounts</td>
</tr>
<tr>
<td>Email</td>
<td>Leads, and Contacts</td>
</tr>
</tbody>
</table>
Select the report columns
Group the columns
Select the arithmetic functions
Specify the advanced sorting filters
Save the report in folder

Availability

<table>
<thead>
<tr>
<th>Editions</th>
<th>Enterprise</th>
<th>Professional</th>
<th>Free</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Unlimited</td>
<td>Unlimited</td>
<td>5 Reports</td>
</tr>
</tbody>
</table>

| Permission Required | Manage Reports And Dashboards |

Note: You can customize the standard reports as per your requirements by clicking the Customize link in the Reports Home page. Once customized, you cannot revert to the default report.

**To select module and the cross-functional modules**

1. Click the Reports tab.
3. In the Create Report page, do the following:
   a. Select the primary module from the Modules drop-down list.
   b. Select the cross-functional modules from the Related Modules list box.
4. Click Continue.
Note: The system will display the column names (in the Columns tab) only for those modules that you select here.

To select the report type

1. In the Create Report page, under the Report Type tab, select one of the following report options:
   - Tabular Report
   - Summary Report
   - Matrix Report
Reports

Note:

- When you select the Summary Report, the Grouping tab will also be available.
- You can Run or Save the report at any point while creating it.
- When you click the Run button, the system will prompt you to save the report. The report is saved temporarily and then a preview of the report is generated.
- When you click the Save button, the report is saved in the folder that you specify.

To select the report columns

1. In the Create Report page, click Columns tab.
2. Do the following to select the columns to be displayed in your report:
   a. Select the columns from the Available Columns list box.
   b. Click Add.
   c. The columns will be added to the Selected Columns list box.
   d. Use the (Up) and (Down) arrow keys to sort the display order of the columns.
   e. Select the column name and click to delete the selected column.
3. Click **Save**.
   In the pop up window, specify the **Report Name**, **Description**, and **Report Folder** details.

4. Click **Run** to save the report first, and then run it.

5. Once you have selected the report columns, click the **Grouping** tab if you are using Summary Report otherwise click the **Columns to Total** tab (refer Step 5).

**To group report columns**

1. In the *Create Report* page, click the **Grouping** tab.

   This tab will be available only when you select Summary Reports under the **Report Type** tab.
2. In the *Grouping* page, you can group the records based on the grouping criteria that you specify.

3. Select the values from the respective lists.

4. Select *Ascending* or *Descending* from the list.

![Figure 42: Grouping](image)

**To select the arithmetic functions**

1. In the *Create Report* page, click the *Columns to Total* tab.

2. In the *Columns to Total* section, select the required arithmetic functions (Sum, Average, Lowest Value, Largest Value).
To specify advanced sorting filters

1. In the Create Report page, click the Criteria tab.
2. In the Criteria section, select the additional criteria for the report.
3. Once you have completed the report customization, do one of the following:
Reports

a. Click **Run** to preview the report.
b. Click **Save**.
c. Click **Cancel**.

**Note:** You can also use a Record's Created By and Modified By fields to define a criteria.

**To save report in folder**

1. In the *Create Report* page, click **Run** or **Save**.

   *Note,* that you can run the report only after you save it.

2. In the *Save Report* dialog box, do the following:

   a. Enter the Report Name.
   b. Enter the Description of the report.
   c. Select the Report Folder in which the report has to be stored.

![Save Report](image)

**Figure 45: Save Report**

3. Click **Save**.

**Create Report Folders**

By default, reports are stored in different categories. You can create personal/public folders to store the frequently used reports in a common folder for easy access.
To create report folders

1. Click the Reports tab.

2. In the Reports Home page, click Create New Report Folder.

3. In the Create New Report Folder page, do the following:
   
   a. Enter the Folder Name.
   
   b. Enter the Folder Description.

   c. Select Accessibility Details:
      
      - **All Users are allowed to view this Template Folder**: Select if you would like to enable the folder access for all the users.
      
      - **Show this Template Folder only to me**: Select if you would like to enable the folder access only to you.
      
      - **Allow the following users to view this Template Folder**: Select the users or user roles that can access the folder.
4. Click Save.

**Schedule Reports**

You can automatically send the reports to your colleagues, executives management and other non-Zoho CRM users by scheduling the reports daily, weekly, monthly or yearly. Once the Report scheduler is configured, report will be delivered to recipients as an email attachment (XLS format).

**Note:** You can create any number of report schedulers but only a maximum of 40 schedulers can be active in the Enterprise Edition and 25 schedulers in the Professional Edition.

**Availability**

<table>
<thead>
<tr>
<th>Editions</th>
<th>Enterprise</th>
<th>Professional</th>
<th>Free</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>YES</td>
<td>YES</td>
<td>NO</td>
</tr>
</tbody>
</table>

**Permission Required**

| Schedule Reports |

The following table provides various field names in scheduling reports.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schedule Name</td>
<td>Specify the schedule name</td>
<td>Mandatory field</td>
</tr>
<tr>
<td>Select Report</td>
<td>Select the report from the drop-down list</td>
<td>Mandatory field</td>
</tr>
<tr>
<td>Active</td>
<td>Specify the scheduler status</td>
<td>Check box</td>
</tr>
<tr>
<td>Start Date</td>
<td>Specify the start date of scheduling the report</td>
<td>Mandatory field. The standard date format is mm/dd/yy</td>
</tr>
<tr>
<td>Start Time</td>
<td>Specify the time when the report has to be generated and sent to the recipients</td>
<td>Mandatory field. The standard time format is hh:mm</td>
</tr>
<tr>
<td>Repeat</td>
<td>Specify the frequency of the report scheduler from the drop-down list. You can select one of the options: daily, weekly, monthly, or yearly.</td>
<td>Drop-down list</td>
</tr>
<tr>
<td>Recipient</td>
<td>Specify the recipients from the list.</td>
<td>List</td>
</tr>
</tbody>
</table>
To setup report scheduler

1. Click the Reports tab.
2. In the Reports Home page, click Reports Scheduler.
3. In the Scheduled Reports page, existing schedulers, if any, are displayed.

![Figure 47: Reports Scheduler](image-url)
5. In the New Report Schedule page specify the values (Refer the Report Scheduler fields table).

6. Click Save.

Export Reports

You can export the reports data in to XLS, CSV, PDF and HTML formats, which can be used for further data analysis purpose.

To export reports

1. Click the Reports tab.

2. In the Reports Home page, select the report from the required module. For example, Lead by Source from the Leads module.

3. In the report page, select one of the following options:
   - Export to Excel: To save the report in *.XLS format
   - Export to CSV: To save the report in CSV format
   - Export to PDF: To export the report in PDF

Note: Using the Export function maximum of 5000 records can be exported. To get more than 5000 records, a complete backup must be requested for which there will be a charge of 10$ per request.

Delete Reports

Periodically you may delete some of the unnecessary custom reports.

To delete reports

1. Click the Reports tab.

2. In the Reports Home page, click the Del link.

Note:

- You can delete only the reports created by you.
- The standard reports cannot be deleted, but can only be customized as per your requirements.
In This Section:

- Create Dashboards
- Create Charts
- Drill Down Dashboards
Dashboard is a pictorial representation of your custom reports, which gives a real-time snapshot of your organization’s key metrics. Using dashboards, you can easily visualize the patterns, and trends in sales, marketing, support, and inventory related data. For example, you can have a glance at the products that are selling fast over a period of time, compare the current quarter sales with previous quarter sales, or compare the actual sales to the projected sales.

In Zoho CRM, dashboard comprises of different types of two-dimensional and three-dimensional charts (components). These charts are built with Adobe Flash technology, which displays the data dynamically. The various types of charts are bar, pie, line, table, or funnel. The unique feature in Zoho CRM is the Funnel chart, which can be used to visualize the various stages in sales pipeline.

Note:

- Please ensure that your Web browser supports Adobe Flash
- In case your browser does not support Adobe Flash plug-in, click the Flash plug-in icon to install it.

Availability

<table>
<thead>
<tr>
<th>Editions</th>
<th>Enterprise</th>
<th>Professional</th>
<th>Free</th>
</tr>
</thead>
<tbody>
<tr>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td></td>
</tr>
</tbody>
</table>

| Permission Required | Dashboards Tab |

Limitations

- Some of the international currency symbols will not be displayed properly.
- Dashboard properties (color, gradient, borders, background etc.) cannot be modified through user interface.
- Dashboards need to be refreshed manually to display the up-to-minute changes.

Create Dashboard Folders

Dashboards can be stored in publicly accessible folders for all the Zoho CRM users or private folders with a limited access to some of the users.
To create dashboard folders

1. Click the **Dashboards** tab.
2. In the *Dashboards Home* page, click the **Go to Dashboard List** link.
3. In the *Dashboard List* page, click **Create New Dashboard Folder**.

![New Dashboard Folder](image)

**Figure 48: Dashboard Folder**

4. In the *New Dashboard Folder* page, do the following:
   a. Enter the **Folder Name**.
   b. In *Accessibility Details* section, define the user's accessibility to view the dashboard folder.
5. Click **Save**.

**Create Dashboards**

Dashboard is a summarized view of the custom report data in Zoho CRM. It provides a platform for a real-time analysis on the sales stages and business operations.
Availability

<table>
<thead>
<tr>
<th></th>
<th>Enterprise</th>
<th>Professional</th>
<th>Free</th>
</tr>
</thead>
<tbody>
<tr>
<td>Editions</td>
<td>Unlimited</td>
<td>Unlimited</td>
<td>3 Dashboards</td>
</tr>
<tr>
<td>Permission Required</td>
<td>Manage Reports And Dashboards</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

List of Standard Dashboard Components

In the Dashboard home page the following types of dashboards are available.

<table>
<thead>
<tr>
<th>Module</th>
<th>Standard Dashboard Components</th>
</tr>
</thead>
</table>
| Leads                   | • Leads by Source  
                        | • Leads by Status  
                        | • Sales by Lead Source  
                        | • Leads by Industry |
| Accounts and Contacts   | • Sales by Account  
                        | • Accounts by Industry |
| Potentials              | • Pipeline by Stage  
                        | • Pipeline by Probability  
                        | • Potentials by Type |
| Campaigns               | • Campaign Leads  
                        | • Campaign Vs Revenue |
| Cases and Solutions     | • Cases by Origin  
                        | • Cases by Priority  
                        | • Cases by Status |
| Products                | • Products by Category |
**Note:** You cannot modify or delete the standard dashboards.

**To create dashboards**

1. Click the **Dashboards** tab.
2. In the **Dashboards Home** page, click the **Go to Dashboard List** link.
3. In the **Dashboard List** page, click **Create New Dashboard**.

![New Dashboard](image)

**Figure 49: New Dashboard**

4. In the **New Dashboard** page, do the following:
   a. Enter the **Dashboard Name**.
   b. Select **Dashboard Folder** from the list in which the dashboard has to be stored.
   c. Enter the **Description** of the dashboard.
5. Click **Save**.

### Create Charts

After creating a dashboard you must add components (charts, representing the exact data in pictorial form), which includes Bar, Pie, Line, Funnel, or Table charts.

You can select the charts to display the data in pictorial form and table to display the data in tabular format.

**List of Standard Charts**

<table>
<thead>
<tr>
<th>Chart Type</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bar chart</td>
<td>To display two or more kinds of data, that can be used to compare values across categories.</td>
<td><img src="image" alt="Bar Chart Example" /></td>
</tr>
<tr>
<td>Pie Chart</td>
<td>To display data that is divided into triangular areas proportional to the percentages of the whole and used to illustrate the relationship of parts to the whole.</td>
<td><img src="image" alt="Pie Chart Example" /></td>
</tr>
<tr>
<td>Line Chart</td>
<td>To display a trend over a period with the variations in the multiple values in a single chart.</td>
<td><img src="image" alt="Line Chart Example" /></td>
</tr>
</tbody>
</table>
Funnel Chart
To show the convergence of data from the entry level to exit level. It is typically used to show the sales pipeline at any point of time.

Table Chart
To show sum of the values in each category of the data.

To create report charts
1. Click the Dashboards tab.
2. In the Dashboards Home page, click Add Component.
3. In the Add Component page, do the following:
   a. Select the Component Type, either Chart or Table.
   b. Enter the Component Name
   c. Select the source of data for the report from the Source Report list.
4. Click Next.
5. In the Add Component page, select the type of chart from the Select Chart Type list box.
6. Under Provide Chart Details, the X-Axis and Y-Axis details are displayed.
7. Click Finish.

After adding a chart to the dashboard, you can perform the following operations:

- Delete the chart
- Edit the chart
- Drill-down the chart
Dashboards

- Change to 2-dimensional or 3-dimensional view
- Zoom out the chart

![Pipeline by Stage](image)

**Figure 50: Zoom Out Chart**

**Note**: You can delete only the custom charts created by you.

**Drill Down Dashboards**

This feature enables you to view a detailed report on the selected data in any dashboard report.

**To drill-down dashboards**

1. Click the **Dashboards** tab.
2. In the *Dashboards Home* page, select the dashboard from the **Switch to Dashboard** drop-down list.
3. In the selected dashboard, click on the data for which you need a detailed report.
4. The data is displayed in the form of a report.
5. In the Report page, you can export the data to PDF/XLS/CSV, save the report, customize it, or create a chart based on the details.
Dashboards

Zoom in Charts

This feature enables you to zoom in and zoom out the chart for a better visualization of data, which is very useful while working with huge data.

To zoom in the charts

1. Click the Dashboards tab.

2. In the Dashboards Home page, select the dashboard from the Switch to Dashboard drop-down list.

3. In the Dashboards Home page, in the required chart click the 🔍 (Zoom icon).
   The enlarged chart is displayed in a separate window.
In This Section:

- Activity Management in ZCRM
- Task Management
- Event Management
- Log Calls
CHAPTER 25

TASK AND EVENT MANAGEMENT

In This Section:

- Create Tasks and Events
- Create Recurring Activity
- Set Reminders
Tasks and Events

CHAPTER 25
TASKS AND EVENTS

Activities plays an important role in daily business operations. Activities can be either time bound calendar events, such as meetings, seminars, appointments, etc or status bound tasks, such as send status report to manager, send e-mail to customer, etc. In Zoho CRM, most of the records have activities as a related list for a better 360 degrees view. You can associate activities with modules, such as leads, accounts, contacts, potentials, campaigns, etc. Under the Activities Module, you can store information related to Tasks, Events, and Calls.

Availability

<table>
<thead>
<tr>
<th>Editions</th>
<th>Enterprise</th>
<th>Professional</th>
<th>Free</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Permission Required</th>
<th>Activities Tab</th>
</tr>
</thead>
</table>

Create Tasks

Task is a specific piece of work required to be done within a given time frame. They are listed in the Zoho CRM's Home page of the user, Activities home page, and in other related records.
To create tasks

1. Click the New Task link.
   Alternatively, click the New Task button from records, such as leads, accounts, contacts, potentials, cases, and others.

2. In the Create Task page, specify the following details:
   - **Task Owner** - Select the owner of the task. By default, the user who creates the task is the owner.
   - **Subject** - Specify the subject of the task.
   - **Due Date** - Specify the due date for the task.
   - **Select Contact/Lead** - Choose the contact or lead name with which the task needs to be associated.
   - **Select Module** - Choose the module with which the task is associated. This field is available only if Contact is selected in the previous field.
   - **Status** - Choose the status of the task.
   - **Priority** - Choose the priority of the task.
   - **Send Notification E-mail** - Select the checkbox to send an email notification (about the task) to the task owner.
   - **Remind At** - Select the checkbox to set email or pop-up reminders.
   - **Description** - Specify additional details about the task.

3. Click Save.

Note: Tasks will be closed, only when the Status of the task is updated as Completed.

Create Events

Event is an activity that happens at a given place and time. They are listed in the Zoho CRM's Home page of the user, Activities home page, Calendar, and in other related records.

To create events

1. Click the New Event link.
   Alternatively, click New Event from records such as leads, accounts, contacts, potentials.

2. In the Create Event page, specify the following details:
   - **Event Owner** - Select the owner of the event. By default, the user who creates the event is the owner.
- **Subject** - Specify the subject of the event.
- **Start Date & Time** - Choose the starting date and time of the event from the calendar.
- **End Date & Time** - Choose the ending date and time of the event from the calendar.
- **Venue** - Specify the location of the event.
- **Select Contact/Lead** - Choose the contact or lead name with which the event needs to be associated.
- **Select Module** - Choose the module with which the event is associated. This field is available only if Contact is selected in the previous field.
- **Send Notification E-mail** - Select the checkbox to send an email notification (about the event) to the event owner.
- **Recurring Activity** - Select the checkbox to repeat the same event in future.
- **Remind At** - Select the checkbox to set email or pop-up reminders.
- **Description** - Specify additional details about the event.

3. Click **Save**.

### To create events from Calendar

1. Click the **Calendar**.
2. In the Calendar page, by default, Day View is displayed. Click the time (for example 08:00 hrs), at which you have to set up an event.
3. In the pop-up dialog, select the event option, type the subject in **Subject** field.
4. Click **Save**.
5. In the **Activity** page, click **Edit** to update the event details.
6. In the **Activity** page, enter the other event related details.
7. Click **Save**.

**Note:** Events are automatically closed at the specified end date and time. There is no status update for the events.
Create Recurring Activities

An activity can be repeated by using the recurring option while creating the tasks and events.

**To create recurring activities**

1. Click the **New Task/Event** link.
   Alternatively, click **New Task/Event** from records such as leads, accounts, contacts, potentials.

2. In the **Create Task/Event** page, specify the activity-related details.

   ![Recurring Activity](image)

   **Figure 53: Recurring Activity**

3. Select the **Recurring Activity** checkbox and do the following:
   
   a. Specify the **Start Date** and **End Date** for the activity to be repeated.
   
   b. Specify the **Repeat Type** for the activity and select the options accordingly.

   c. Click **Save**.

<table>
<thead>
<tr>
<th>Daily - Fields</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Everyday</td>
<td>Select this if the activity should be repeated everyday.</td>
</tr>
<tr>
<td>Recur every ___ day(s)</td>
<td>Select this to specify how often in days the activity should be repeated.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Weekly - Fields</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recur every</td>
<td>Enter how often in weeks the activity should be repeated.</td>
</tr>
</tbody>
</table>
### Days of the week

Select the checkbox(es) that correspond to the day(s) of the week on which the recurrence should occur.

<table>
<thead>
<tr>
<th>Monthly - Fields</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>On day ___ of every ___ month(s)</td>
<td>Enter how often in months and on the specified date the activity should be repeated.</td>
</tr>
<tr>
<td>On ____ ____ of every ___ month</td>
<td>Select a particular day when the activity should be repeated every month.</td>
</tr>
</tbody>
</table>

### Set Reminders

While creating a task or event in Zoho CRM, you can set a reminder for it. There are two options for reminders:

- **Alert through Email** - On selecting this option, you can receive reminders for your tasks or events through emails.
- **Alert through Pop up** - On selecting this option, you can receive pop up reminders for your tasks or events.

**Note:** The Reminder option is available only in the Paid Editions. It is not available in the Free Edition or Trial versions.

**To set reminders for tasks**

1. In the **Activities** tab, click on the task for which you want to set reminders.
2. In the **Task Details** page, click **Edit**.
Tasks and Events

Figure 54: Reminders

3. Select the **Remind At** checkbox and do the following:
   
   a. Specify the time when you want the reminder.
   
   b. Specify the recurrence pattern. (Daily, Weekly, Monthly, etc.)
   
   c. Choose **Alert Through Email** or **Alert Through Pop up** as required.

4. Click **Save**.

To set reminders for events

1. In the **Activities** tab, click on the event for which you want to set reminders.

2. In the **Event Details** page, click **Edit**.

Figure 55: Reminders

3. Select the **Remind At** checkbox and do the following:
   
   a. Specify the interval of time to receive an alert before the event starts.
   
   b. Specify the recurrence pattern. (Daily, Weekly, Monthly, etc.)
   
   c. Choose **Alert Through Email** or **Alert Through Pop up** as required.

4. Click **Save**.

After creating an event, you can invite users, leads, or contacts for the event by clicking Add Invitees.
Note:

- If an email reminder is set for the event, then the event owner and also the invitees will get email reminders.
- If a pop-up reminder is set for the event, then the event owner and also the users (in your CRM account) added as invitees will get pop-up reminders.

Add Invitees

To invite multiple users, leads, or contacts to the event

1. In the Activities tab, click on the event for which you want to add invitees.
2. In the Event Details page, click Add Invitees.
3. In *Invitees Lookup* popup window, search for **Users**, **Leads**, or **Contacts**.
4. In the list of Users, Leads, or Contacts, select the corresponding checkbox(es).
5. Click **Add** or **Add and Send Email**.

*Note:*

- If an email reminder is set for the event, then the event owner and also **the invitees will get email reminders**.
- If a pop-up reminder is set for the event, then the event owner and also **the users (in your CRM account) added as invitees will get pop-up reminders**.
In This Section:

- Log Inbound & Outbound Calls
- Associate to Other Records
The Log a Call functionality helps you to register the inbound (received from leads and customers) and outbound (dialed to leads and customers) call details such as, call duration, date and time of calls, notes, etc. Users who frequently make calls or receive calls in an organization can make use of this functionality in Zoho CRM.

For instance, this is of great help to the Customer Support Executives who often receive calls from their customers. By recording call logs, they can identify the time spent on each call and keep track of the average time spent in calls on a monthly basis. On the other hand, the Sales and Marketing Executives can keep track of all the calls they make to their prospects. The call details can be further used to generate reports on billing details, average time spent on calls, number of calls per day, etc.

### Availability

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</thead>
<tbody>
<tr>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td></td>
</tr>
</tbody>
</table>

### Benefit

- Helps identify typical queries asked by users
- Keep track of all the customer calls for future reference.

### Log a Call

Using the Log a Call feature in Zoho CRM you can capture the completed and current call details.

**To log a current call**

1. Click the **New Call** link.
2. In the Log a Call page, specify the details of the call.
3. In the Time Details section, click Current Call. By default, Current Call is selected.

Figure 57: New Call

Figure 58: Call Details
4. Click **Start**.
   The call timer indicates the duration of the current call.

5. Click **Stop** when the call is completed.
   The **Call Start Time** and **Call Duration** is automatically updated

6. Click **Save** to save the current call

7. Click **Save & Create Follow-up Task** to save and create a follow-up task.

Notes:

- The **Related To** field will be available only if you are calling a Contact.
- The user who logs a call is the **Call Owner** and you cannot change owner of the call.
- Only users with the permission to edit the call record can modify it.
- The details of the call will be available in the **Activities** tab.

**To log a completed call**

1. Click the **New Call** link.
2. In the *Log a Call* page, specify the details of the call.
3. In the *Time Details* section, click **Completed Call**. By default, Current Call is selected.
4. Enter the **Call Duration** of the call in minutes and seconds.
5. Click **Save**, or click **Save & Create Follow-up Task** to save and create a follow-up task.

Note:

- The **Related To** field will be available only if you are calling a Contact.
- The details of the call will be available in the **Activities** tab.

**Associate calls with CRM records**

**To associate calls with CRM records**

1. Click the **Leads** or **Contacts** tab.
2. Select the record for which you want to log a call.
3. In the *[Record] Details* page, the existing call details, if any, are displayed.
4. Click **Log a Call**.

5. **Figure 59: Log a Call**

6. Click **Save**, or click **Save & Create Follow-up Task** to save and create a follow-up task.

List of Standard call related fields

In the Log a Call page, you need to specify the call-related information. The following table provides description of the various fields in the page.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
<th>Data Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subject</td>
<td>Enter the subject of the call.</td>
<td>Text Box</td>
</tr>
<tr>
<td>Call Type</td>
<td>- Choose <strong>Inbound</strong> for the incoming calls in your organization.</td>
<td>Select option</td>
</tr>
<tr>
<td></td>
<td>- Choose <strong>Outbound</strong> for the outgoing calls in your organization.</td>
<td></td>
</tr>
<tr>
<td>Related To</td>
<td>Choose the type of record to which the call is related and then choose the record.</td>
<td>Drop-down list</td>
</tr>
<tr>
<td>Call From/To</td>
<td>Specify to whom the call is made or from whom the call is received.</td>
<td>Select option</td>
</tr>
<tr>
<td>Call Purpose</td>
<td>Choose the purpose of the call from the drop-down list.</td>
<td>Pick list</td>
</tr>
<tr>
<td>Call Result</td>
<td>Specify the call result</td>
<td>Text Box</td>
</tr>
<tr>
<td>Time Details</td>
<td>Action</td>
<td>Option</td>
</tr>
<tr>
<td>------------------</td>
<td>------------------------------------------------------------------------</td>
<td>---------------</td>
</tr>
<tr>
<td></td>
<td>Click <strong>Current Call</strong> if the call is in progress.</td>
<td>Select option</td>
</tr>
<tr>
<td></td>
<td>Click <strong>Completed Call</strong> if the call is completed.</td>
<td></td>
</tr>
<tr>
<td>Call Start Time</td>
<td>Automatically displays the current date and time.</td>
<td>Date and Time</td>
</tr>
<tr>
<td>Call Duration</td>
<td>Displays the call duration for the Current Calls.</td>
<td>Numeric</td>
</tr>
<tr>
<td></td>
<td>For Completed Calls, specify the call duration.</td>
<td></td>
</tr>
<tr>
<td>Description</td>
<td>Specify the description of the call.</td>
<td>Text Box</td>
</tr>
<tr>
<td>Billable</td>
<td>Select the check box if the call is billable.</td>
<td>Check Box</td>
</tr>
</tbody>
</table>

**Note:** You cannot add custom fields in the Log a Call page. However you can customize the existing fields using page layout customization.
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