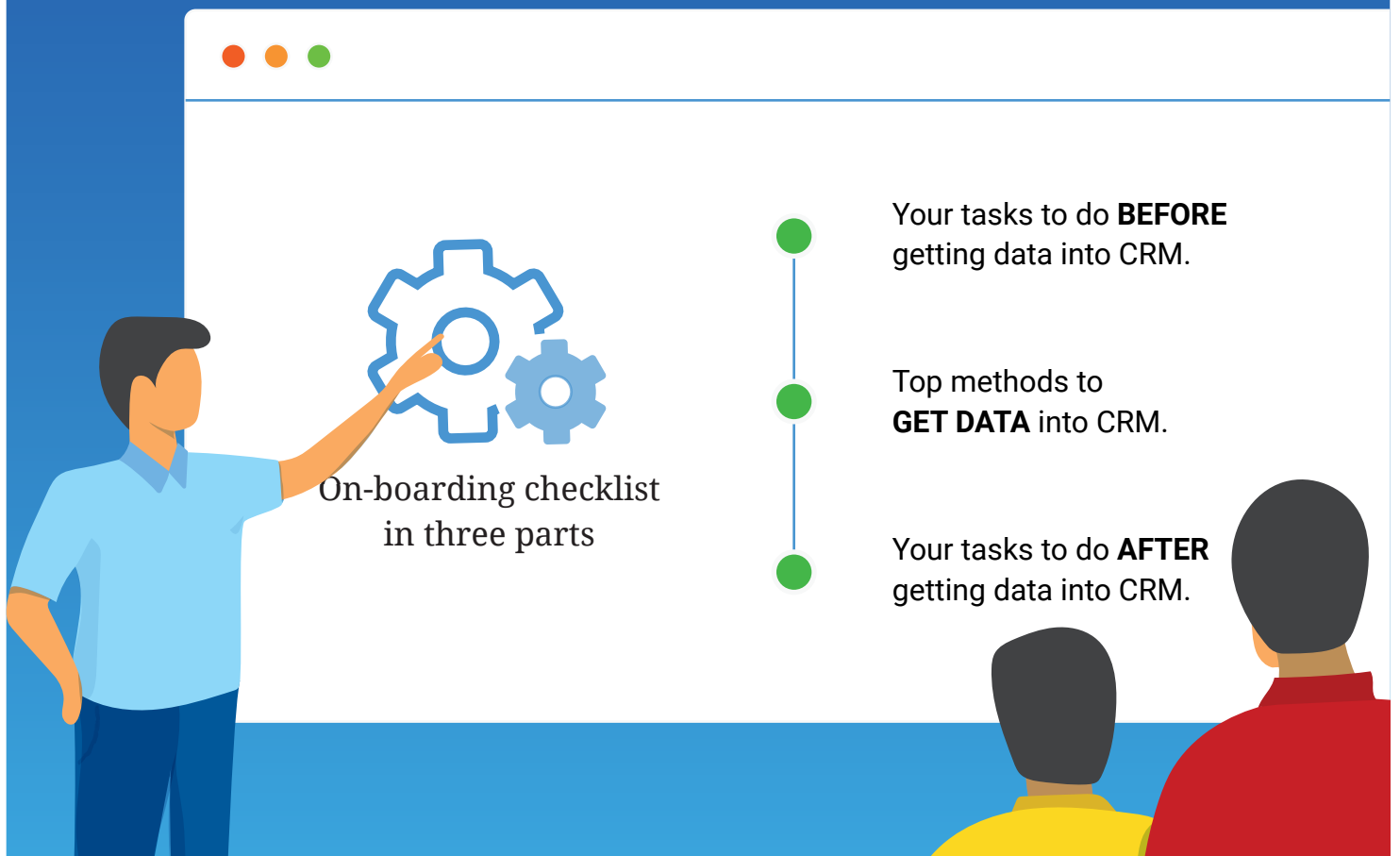


# An Onboarding Guide

For Zoho CRM Administrators



zohocrm.com

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# Welcome aboard!

Thank you for choosing Zoho CRM. You are already on your way to managing your business better. Zoho CRM not only helps you to maintain a database of your customers and their requirements, but also enables you to reach out to them via multiple communication channels, build and streamline business processes, automate routine actions, integrate with several third-party applications, and allow extensive customization, among many other benefits.

However, if you think that CRM is only a piece of software, you might be mistaken. Customer Relationship Management is essentially a concept which has existed for decades now, perhaps ever since the barter system (The Nuts and Bolts of CRM, 2005). It is the way good businesses manage their customers, and to do so, you need to perform various activities right from identifying prospects and following up with them, to closing deals and establishing long-lasting customer relationships. To execute these tasks, businesses in the past have used tools such as spreadsheets and notes, but when a business scales up these manual tools can be inefficient or even get in the way.

Enter CRM software. Businesses can now map their processes and people to a system that is designed specifically for sales. Right from the identification of prospects to following up with them and establishing continued relationships with customers, you can run your complete business efficiently in a single app with wide-ranging features. Bonus points: a CRM setup, unlike spreadsheets, is meant to hold your business together even as you scale up.

Zoho CRM is ideal for businesses because it's simple, secure, user-friendly, and cloud-based. A great benefit that sets Zoho apart from competing CRM apps is its "single ecosystem" factor. That is, in addition to sales, Zoho offers dedicated solutions for all of your business needs such as finance management, email, live chat, etc, in an integrated suite of business apps. When you run your business on a suite of apps from a single provider, the synchronization and performance is seamless.

For now, this guide will help you get started with Zoho CRM. Treat this guide as a fundamental checklist for you to ensure that your CRM has the bare minimal setup required to get your business up and running.

# It's okay to be confused!



**“Confusion, when embraced, is the starting point for discovery, direction and decision.”**

- Richie Norton  
Award-Winning Author

Often, when you begin something new, you are bound to be confused. When you go to a new country, you might struggle to understand the people, the cultures, or say, their transport system. You might lose your way in a new city, despite a clear map. However, this confusion will pave the way for you to learn, decide and achieve clarity eventually. This sort of confusion is to be embraced, not feared.

Similarly, while software systems are for the most part user-friendly and simple, as you get started with the system, some amount of initial confusion is inevitable.

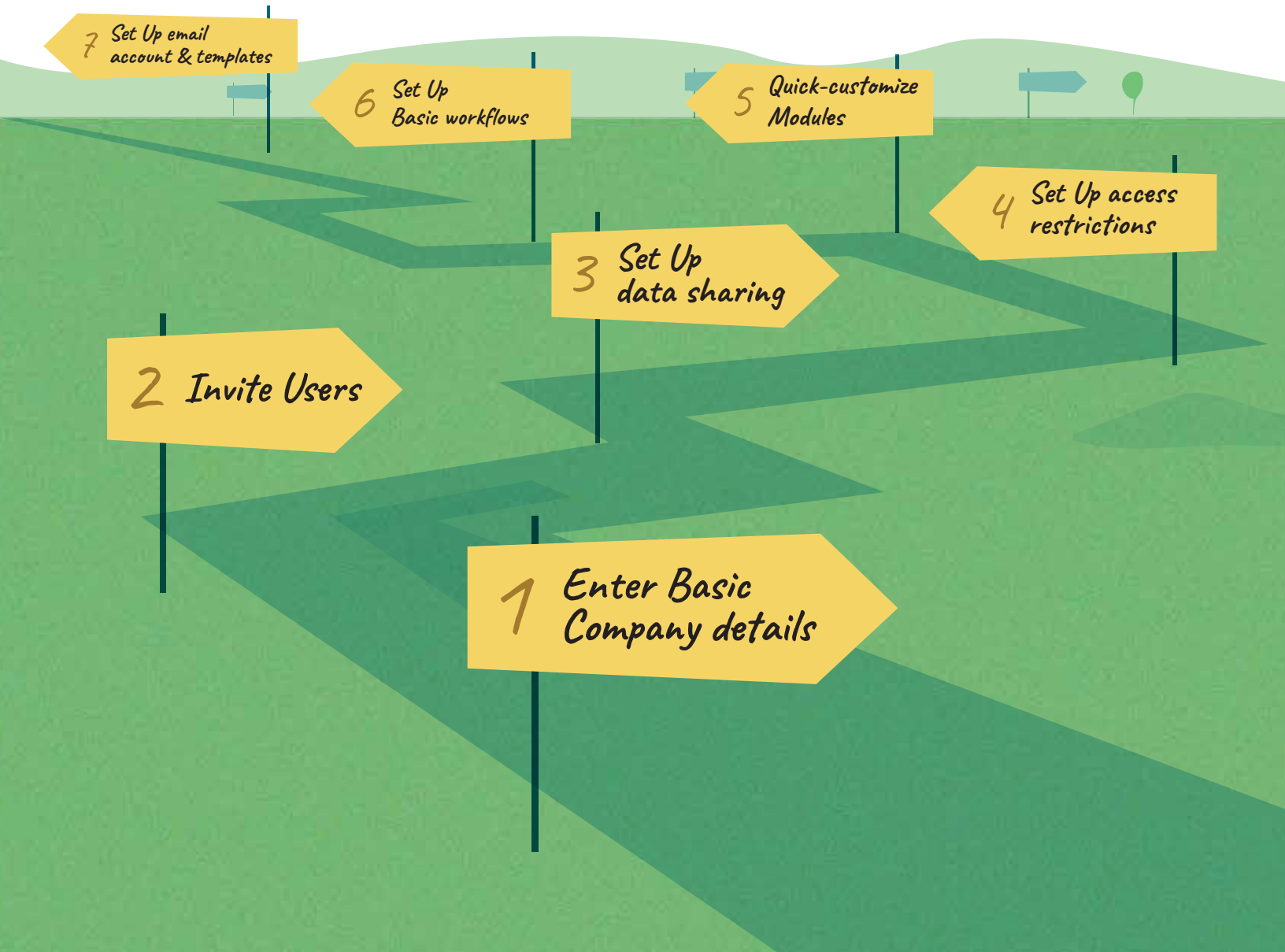


When presented with a plethora of features, which ones do you use? How do you work your way through a control panel with myriad privileges to enable or disable? These questions could trouble you when you embark on setting up a whole new software system for your business. You will eventually figure out your way through it even without help; but to accelerate this process and to guide you, we have traced an ideal path of sorts, that will help you get a comfortable start with Zoho CRM.

Let's look at the on-boarding checklist in three parts:




- Your tasks to do **BEFORE** getting data into CRM.
- Top methods to **GET DATA** into CRM.
- Your tasks to do **AFTER** getting data into CRM.

PART I  
Things to do right **BEFORE** getting  
your data into CRM



## #1 Enter basic company details

Zoho CRM requires you to enter the following basic company details:

-  **Name, address, logo, contact information:**  
(Helpful in pulling up company information in email templates and signatures).
-  **Time zone:**  
(Instrumental in sending email notifications, scheduling reminders and so on).
-  **Currency locale:**  
(Instrumental for entering amount fields such as Deal Amount, Product Price and so on).

There are other, more advanced settings under Company Details. It's not mandatory to configure these right away.



- "Multi-currency" is required only if your business deals in different currencies.
- Business hours are helpful when your employees work multiple shifts.
- Fiscal year is key in determining forecasts.

## #2 Invite Users and map them to their roles and profiles

Next, you must invite users to your CRM account.

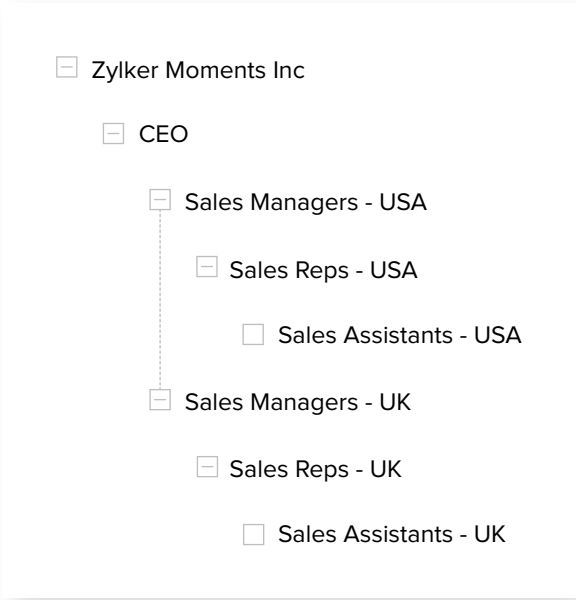
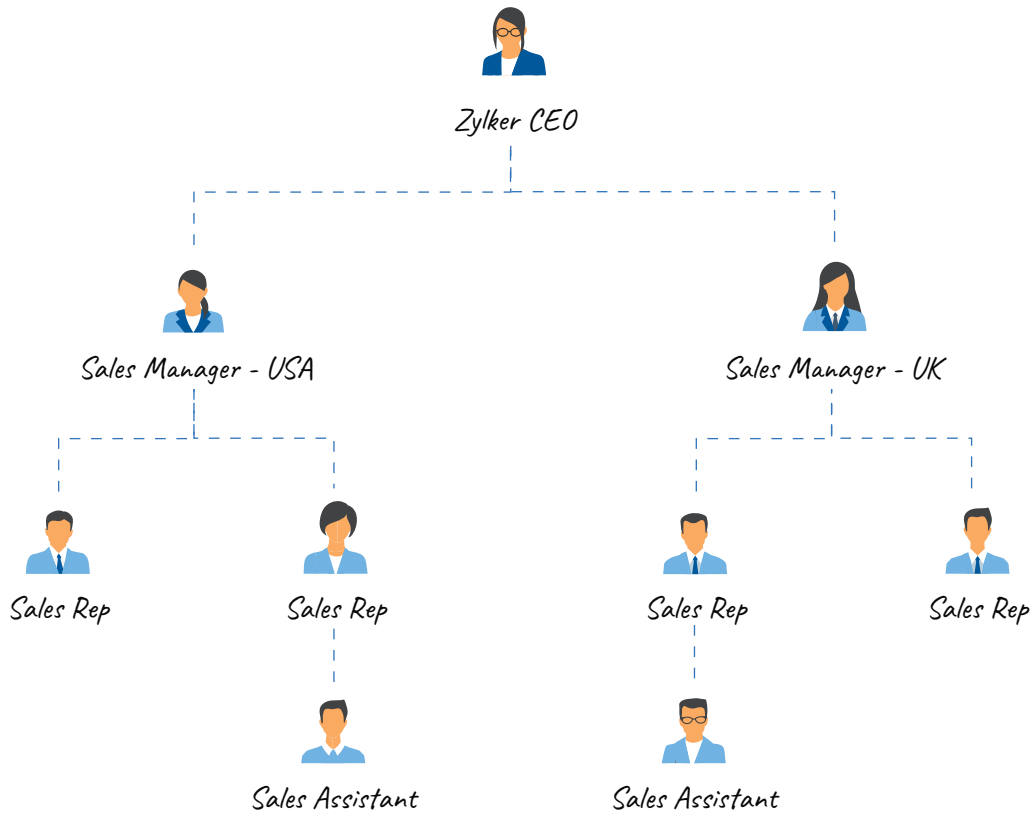
Inviting a user consists of defining their specific positions and privileges. You certainly don't want a junior-level staff to access a CEO's confidential data. Therefore, it's important to map users to the correct roles and privileges in CRM, so that data sharing and permissions are controlled efficiently, across the system.

To do this, you must first define what we call Roles and Profiles.

-  **Roles:**  
A setup that lets you map the roles of your organization's members to the CRM system.
-  **Profiles:**  
A master control panel that enables you to define a user's permissions in CRM

Roles and Profiles are the two fundamental concepts in user management. They are like the two sides that make up a coin. While roles determine data access flow, profiles determine the CRM functions that a user can perform in CRM.

**Sample: Zylker's organization hierarchy:**



From this structure, it's clear that the designations are CEO, Sales Managers, Sales Reps and Sales Assistants and that the organization follows a linear hierarchy. So, the following will be Zylker's Role Hierarchy in CRM. This also defines how data is shared between users in the organization.

According to this hierarchy, The CEO can see everyone's data - as he/she is the top most in the role hierarchy. The Sales Managers can see the Sales Reps' and Assistants' data, but not the CEO's data.

The Sales Reps can see the Sales Assistants' data, but not the CEO's or Sales Managers' data. The Sales Assistants are last in the organization ladder - and so they cannot access anyone else's data but their own.

To invite one of the users, say Jill, Zylker's Admin has to map her to an appropriate role and profile. In this case,

- The Role will be Sales Managers - USA.
- Profile could be Administrator, if Jill's position makes her eligible for all CRM privileges. Otherwise, the Zylker Admin must create a custom profile called, say, **Sales Managers**, make the required changes to profile permissions, and THEN assign Jill to this profile.

### Why should I assign users to a profile? Why can't I create permissions separately for each user?

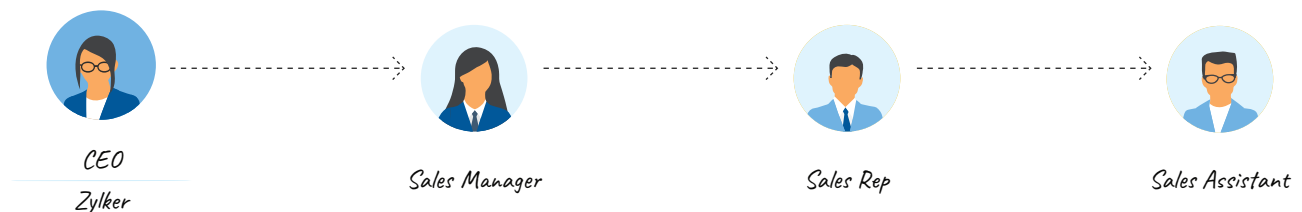
Say you have a 100 sales reps in your company. All of them come with the same level of access rights and privileges. It's not practical for you to manually create the same set of permissions for each user. Rather, you'd define a Profile with all possible privileges, call it the Sales Reps profile and simply assign these 100 users to this profile. Later, even if you have changes to these permissions, you can simply alter them in this one profile and it will be applicable for all the 100 users assigned to it, in one shot. This setup makes it much easier and efficient for an administrator to manage controls.

For more information, refer: <https://www.zoho.com/crm/help/security/manage-users.html>

## #3 Enable data sharing rules

Data sharing, by default, in CRM follows the order established in the role hierarchy.

For example, consider this role hierarchy:





According to this default setup, sales reps can see the data of their sales assistants but not that of the sales managers or the CEO. However, assume that you must overrule the role hierarchy because of some exceptions or unique requirements in your data sharing setup.

**Exception:** Sales reps cannot access any of their managers' data except for leads. In such a case, the administrator can configure data sharing exceptions to the role-hierarchy.

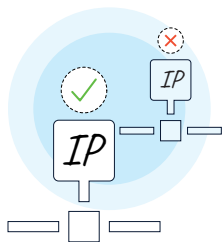
Exceptions can be of two types:

- **Module-level exceptions:** If you wish to share an entire module with a user in a junior role, you can write data sharing rules.
- **Record-level exceptions:** If you wish to share only a few records with the user, you can use record level sharing.

## #4 Access Restrictions

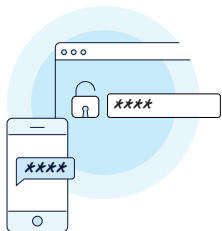
Zoho takes privacy seriously and your data is secure on our servers. In addition to our stringent security measures, we also allow users to configure their own security settings in their Zoho accounts.

**On that note, here are the top 2 settings you can immediately set for your CRM account.**



### Allowed IPs:

Let's say you want your team members to access the CRM only from your office. You would like to prevent log ins from random places such as your employees' houses, hotels etc. In such a case, you can configure the IP addresses from which logins are allowed. When a user tries to sign into CRM from any other IP address other than the one assigned to him/her, CRM will restrict the entry.



### Two-factor authentication:

TFA or 2FA, as it is casually called, adds another layer of security to your Zoho accounts. Once you enable Two-Factor Authentication, apart from the regular account password, you will be prompted to enter an OTP in order for your to sign in. This OTP can be received on your mobile phone or via One Auth application from Zoho.



So now, you have configured **company settings**, **invited users**, **defined their privileges** in CRM, and made your account more **secure**. Kudos! These four steps form the mandatory part of your initial CRM setup.

What follows are settings that are not exactly mandatory, but would make your CRM setup more efficient if configured.

## #5 Customize modules:

While Zoho CRM is designed to accommodate most of the generic sales needs of any organization, this default setup may not fit the bill at all times. Each company comes with a set of unique requirements for which CRM's default settings may not be the right solution. But what's more important for an application is that it comes with the facilities and tools to customize it as much as possible.

Zoho CRM has a rich customization suite that lets you customize modules, fields, permissions, links, buttons and templates. It is advisable to work on a basic module customization setup before you import your data into CRM.

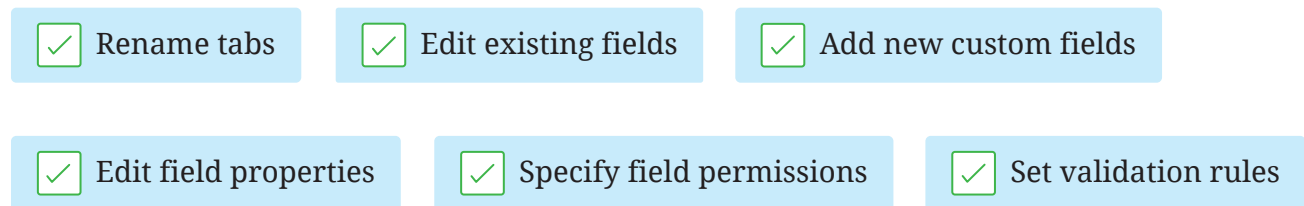
### Why should I customize my modules even before I import data?

When you import data into CRM in bulk, you will be required to map fields from your import document to CRM. If the fields in your sheet do not exist in Zoho CRM, your import will not be complete. As a result you may have missing pieces of information. To avoid this disparity, it is advisable to create these custom fields and work on a basic round of module customization so that data import will be much easier and hassle-free.

## Your action items for basic module customization:

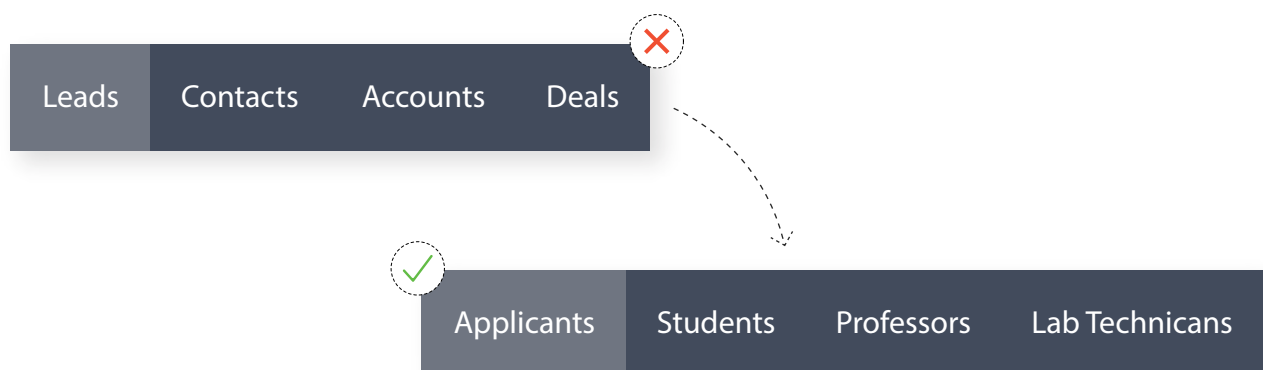
Let's say Zylker University gets on board Zoho CRM for their student management needs. Now, a University is clearly different in many ways from a sales organization, yet, Zoho CRM can be customized well to meet their needs.

Here is a simple flow for Zylker University, just to give you a quick insight into module customization in Zoho CRM. With this as reference, try and customize basic pieces of the CRM for your organization:



### **Rename tabs**

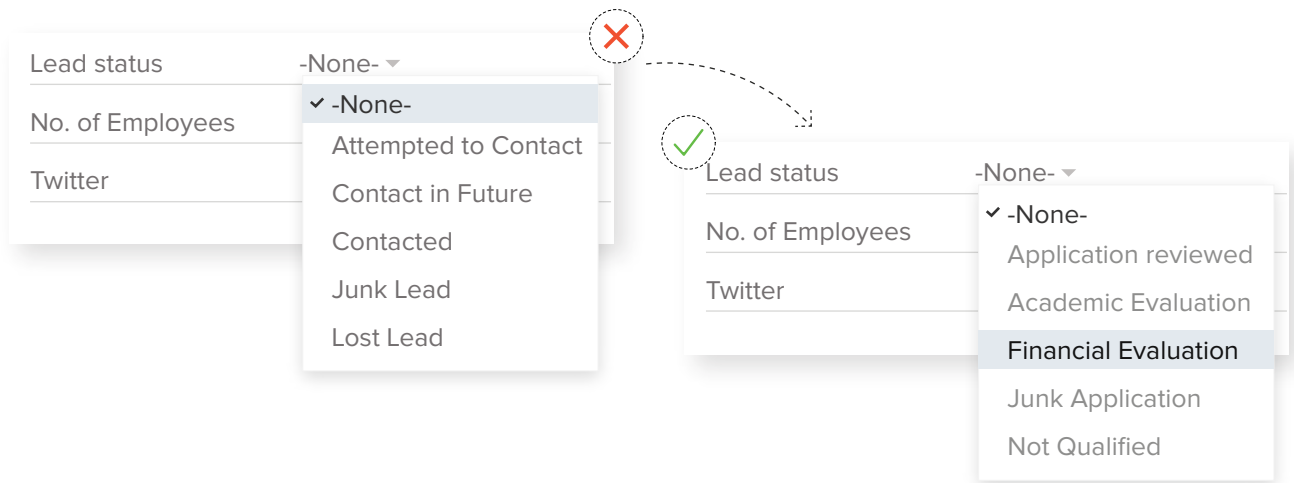
While a sales organization requires modules such as Leads, Contacts and Accounts, a University does not use this terminology. The equivalent of Leads for them could be "Applicants" and successful applicants who have been enrolled will be converted to "Students". Zylker must rename their tabs accordingly.



### **Edit existing fields**

Once you have renamed the tabs, you must edit existing fields. For example, the Lead Status field may have to be edited to reflect the Application review stages in Zylker University.

Similarly, you can rename and edit existing fields. Trash the ones that you don't need.



### ✓ Add custom fields

Zylker may require a whole bunch of new fields to be added to their Applicant's module apart from the ones that exist in CRM. Here are some of the most commonly used field types and their examples in the context of Zylker University:

- a. **Single line field:** Applicant Enrollment ID
- b. **Picklist field:** Department associated
- c. **Lookup field:** Courses
- d. **Currency field:** Application fee
- e. **Date field:** Date of application

#### Create Applicant

<b>Applicant Information</b>	
First Name	-None- ▼   Priya
Last Name	Raman ▼
Applicant Source	Seminar Partner
Applicant Enrolment ID	ZU8575957 ▼
Department	Engineering <span style="float: right;">× 🔍</span>
Courses	Electrical Engineering <span style="float: right;">📅</span>
Application fee	Rs. 500
Date of application	08/01/2018

## ✓ Edit field properties

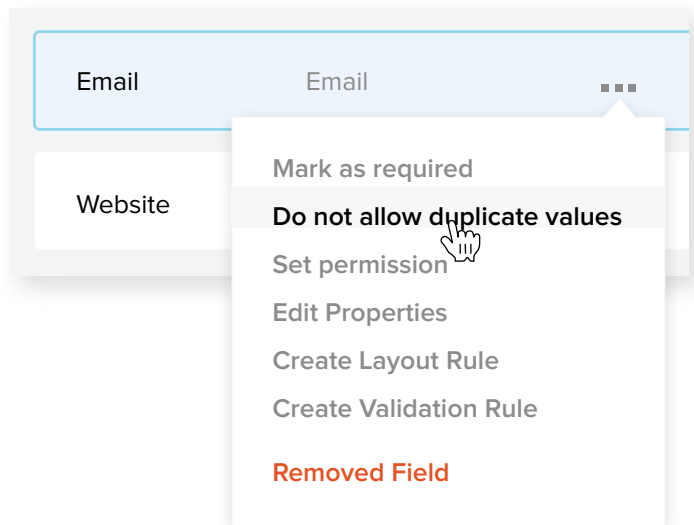
Some top field properties are mentioned below:

### a. Mark a field as required:

Select this option to make a field mandatory to be filled. Without entering a value for a required field, a user cannot save a record.

### b. Do not allow duplicate values:

Select this option to mark a field as unique. This will help you arrest duplicate records in CRM. Say you make Enrollment ID a unique field. If someone tries to create another Applicant with the same ID, CRM will throw an error, alerting you that a similar record already exists.



## ✓ Specify field permissions

You can specify permissions for users at the field level, for every user in your organization.

For example, consider a field called Student's Total Score. This can be edited by professors but can only be "viewed" by office admins. So you can specify **Read/Write** access for the Professors profile and **Read** access for Management Staff profile.


### Set Permission - Email

Profiles	Read and Write <a href="#">All</a>	Read Only <a href="#">All</a>	Dont Show <a href="#">All</a>
Administrator	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Standard	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

## ✓ Set validation rules for key fields

The invariable thing about databases is that, over a period of time, they accumulate junk. This could be in the form of duplicates, incorrect data, or unnecessary information.

### Create Applicant



Applicant Information

First Name	-None- ▾ Priya
Last Name	Raman
Applicant Source	Seminar Partner ▾
CGPA	2

Sorry! CGPA should be at least 3 for admission into Zylker.

In order to ensure that the CRM arrests any kind of unacceptable data even as it's being entered in CRM, you may set validation rules.

For example, let's say that Zylker University does not accept the application of a student with a CGPA of less than 3 for any of their courses. In such a case, Zylker could set a validation rule for the CGPA field that states, "If  $CGPA < 3$ , throw a suitable error message." Any user entering an unacceptable value will be duly alerted by the system. This way, you can arrest data with unacceptable values even before it is entered in CRM.

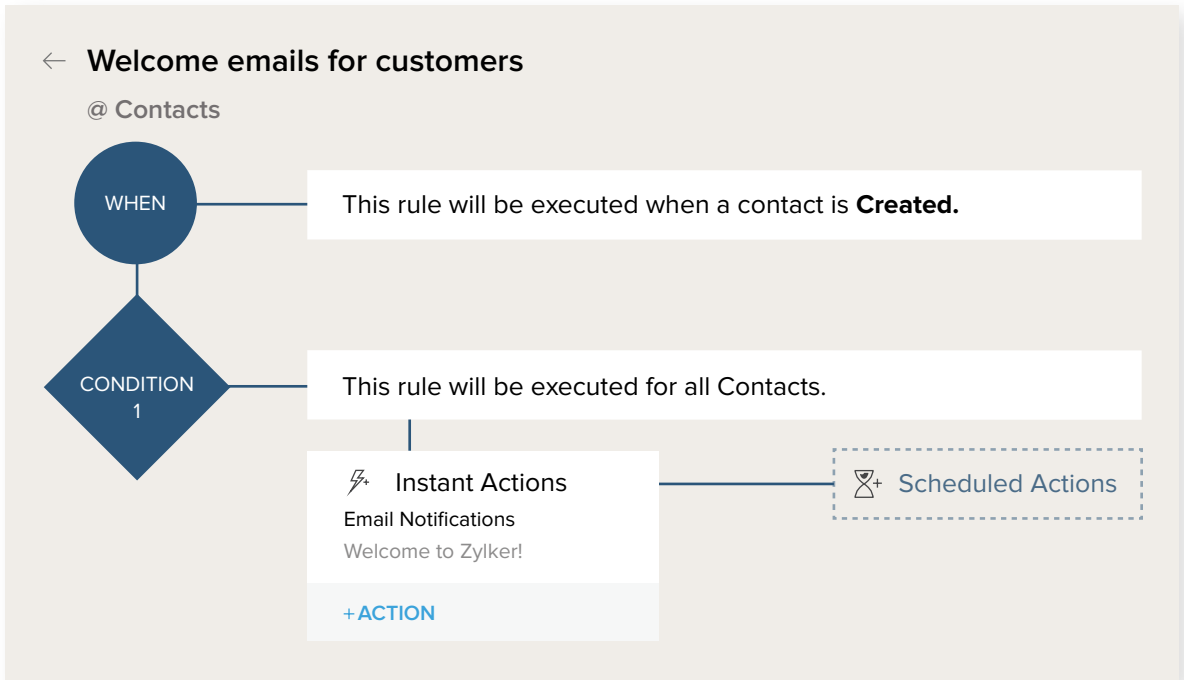
By customizing modules, fields, and permissions and setting validation rules, you will be done with a basic round of module customization in CRM. There are many more options in customization, but it's ideal to get started with these six items and configure more settings as you go.

## #6 Set up basic automation workflows

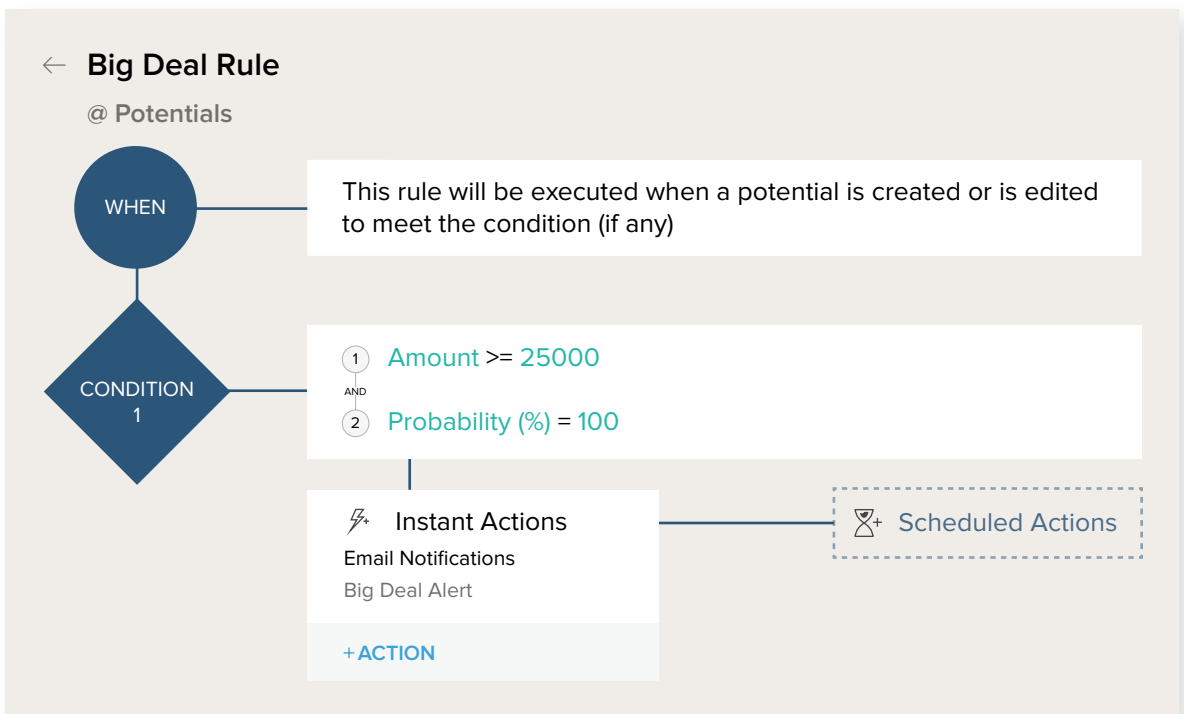
Automation in CRM is crucial, as it saves time and cuts down on most of your manual efforts such as sending routine emails, tasks and reminders. It's good practice to set up these automation workflows even before you get your data in, as there could a set of routine actions to be automated the moment you import data.

**For example:**

- As soon as contacts are created in your CRM, you may want to send them a bunch of welcome emails. (powered by workflow rules).



- As soon as deals worth more than \$25,000 are created, you may want to trigger email notifications to the CEO and sales managers. (powered by workflow rules).



- Perhaps leads based on cold calls have to be assigned to a specific person in your team the moment they are added to CRM. (powered by assignment rules).

Lead Assignment Rule	
Rule Name	<b>Assignment based on lead source</b> <a href="#">Rename</a>
Created By	<b>Amelia Burrows</b> On 06/05/2018
<b>Rule Entries:</b>	
CRITERIA	ASSIGN TO
Lead Source IS Cold Call	<b>Amelia Burrows</b>
Lead Source IS Employee Referral	<b>Martha Hills</b>

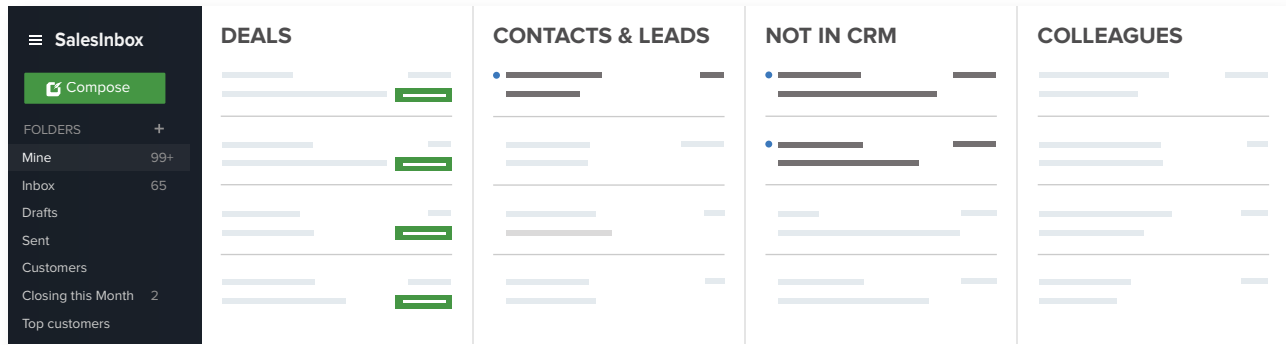
With the above examples as references, try and come up with at least three workflow rules and assignment rules suitable for your company.

## #7 Set up email account and custom templates


Email remains the primary means of communication in any business. Whether we're dealing with inquiries, information, or other issues, we all have to work on emails to and from customers. Say you are working through a long list of emails. How do you know which ones to attend to first? For all you know, you might reply to 10 emails and take a well-deserved coffee break, only to find out that the 11th email was from a top client and needed your immediate attention. It's not humanly possible to remember all your customers and the valuations of your deals with them, or to prioritize them strictly in your head.

You need the sales context for your communication with customers, so you can prioritize. Setting up email in Zoho CRM provides just that; with your email account configured in CRM, you can now send and receive emails from CRM, understand the sales context of the emails, and thereby prioritize. You can add follow-up sales activities from the same tab with absolutely no need to switch between applications. This enables you to work on your email as well as sales from CRM.





## To set up email

simply go to  **Setup > Channels > Email** and configure your email account via IMAP. Enter your email account, password, and required credentials, and you are in!

If you have a common email address that you use to communicate with customers, such as [contact@zylker.com](mailto:contact@zylker.com) or [enquiries@zylker.com](mailto:enquiries@zylker.com), simply activate this as your organization email address.

To set up organization email address.

You will find this under  **Setup > Channels > Email > Organization Emails.**

## Email Templates

Now that you are done setting up your email, it's time to draft a few email templates in CRM. Email templates, as you know, make it easier for you to send the same kind of email to multiple people with just some minimal changes in personalization. Say the New Year is just around the corner. You could design a holiday-themed greeting template and send it to many people at one shot. Or you can write a workflow rule to automate birthday wishes for your customers based on the birthdates you've provided for them in CRM.

Email templates are not just handy for customers. You often need to send email notifications to fellow employees in your company on winning or losing a deal, scheduling a team meeting, editing CRM data, and many other routine occurrences. All you need to do is create templates to this effect and associate the appropriate email template with workflow rules, mass emails, auto-responders, macros and so on. You can also include merge fields in the appropriate places so that the email is also personalized.

## Email template for deal approval, for internal use

**Deal submitted for approval** Public Email Templates

Deal submitted for approval


Preview Analytics

Hi!

I have submitted this **\$(potentials.potential Name)** for your approval. Please verify the discount and get back to me

Regards  
Amelia


## Birthday greetings template



Dear **\$(Leads.Last Name)**,

Happy Birthday! On this special day, we wish you an abundance of joy, success, and good health. May you be blessed with many more years of happiness and satisfaction.

Warmest Regards,  
**\$(Users.Last Name)**

 **COMPANY NAME**  
Company street, Company city, Company country.  
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Part II

## Top methods to **BRING DATA** into CRM



3 *APIs*

2 *Import and  
Data Migration*



1 *Web Forms*

## #1 Set up web forms

Setting up a web form that's integrated with a CRM is the most commonly used method to get a bunch of legitimate leads to work on. When a person visiting your website submits details on your Contact Us or Request a Quote form, you can be sure that they are genuinely interested in your business. Whether this interest will convert to a deal is based on their requirements and how you follow up, but you should not miss out on these leads.

### Contact Us ×

---

First Name *	Last Name *
<input type="text"/>	<input type="text"/>
Last Name *	Date of Birth
<input type="text"/>	<input type="text" value="MM/DD/YYYY"/> 
Email	Mailing Country
<input type="text"/>	<input type="text" value=""/> 

Zoho CRM supports integration with websites. All you have to do is create a web form in CRM with all the fields from the applicable module, copy the source code, and add it on your website. If you are not familiar with working with code, simply send this source code to your webmaster and they can help get this done in minutes.

Once the web form is added to your site, every time a person fills out the form, the details submitted will get added as leads/contacts in Zoho CRM.

## #2 Data migration and import

DATA MIGRATION	IMPORT
Meant for uploading data in bulk, usually from a third-party CRM application.	Meant for uploading data into individual modules in CRM.
Usually a one-time activity performed right when an organization switches to Zoho CRM.	Can be done for each module more than once.
Example: You migrate your data from Salesforce to Zoho CRM.	<b>Example:</b> You're just back from a trade show. You have obtained a new set leads which you wish to "import" to CRM.

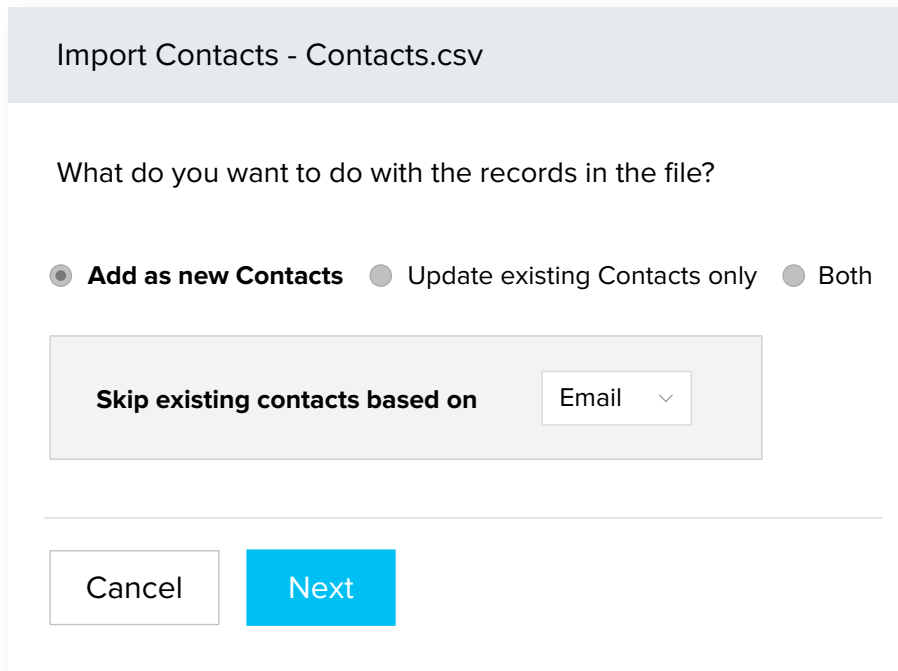
### Data migration

If you are moving to Zoho CRM from a third-party CRM provider such as Salesforce or Sugar CRM, you will have to migrate data. This involves exporting your data from the respective third-party application, uploading this exported file to Zoho CRM, mapping modules and fields, and finally reviewing the imported data. This is a one-time activity and fairly simple. However, if you require assistance with data migration you can always get in touch with Zoho CRM Support executives, who'll help you with it.

The screenshot displays the Zoho CRM Data Migration interface. At the top, a progress bar indicates the current step: 'Module - File Mapping'. Below this, there are filters for 'All Modules (33)', 'Mapped Modules (30)', and 'Unmapped Modules (3)'. On the left side, there are sections for 'MAPPED FILES' (30), 'UNMAPPED FILES' (3) with a list of files (Lead.CSV, Accounts.CSV, Attachments.CSV), and 'UNSUPPORTED FIL...'. At the bottom left, a circular progress indicator shows '80% Files Mapped' with a legend for Mapped (green), Unmapped (grey), and Unsupported (red). The main area displays a grid of modules: Accounts (Map files), Attachments (Map files), Calls (Map files), and others.

## Data import

Importing data, on the other hand, involves uploading module-specific data into CRM. This may be done more than once, even frequently, in order to update and clean up data sets. For instance, you are just back from a trade show, from which you have obtained a whole bunch of new leads. You can draft this list of leads in a spreadsheet and import this sheet into the Leads module.



Import Contacts - Contacts.csv

What do you want to do with the records in the file?

Add as new Contacts  Update existing Contacts only  Both

Skip existing contacts based on

Cancel Next

## #3 Push data to CRM via APIs

Apart from web forms, data import, and migration, Zoho provides REST API support, which lets you integrate your CRM with any third-party application. Say you use an application developed by yourself or your organization for your field agents to collect data about the clients they visit. You might want to integrate that app with CRM to sync the data from the app as well as the CRM. Essentially, whenever data is added to the app, it is simultaneously added to the CRM.

Zoho CRM APIs follow REST standards with OAuth2.0 method of authentication, and uses simple HTTP methods like GET, POST, PUT and DELETE, which makes it easier to develop new applications or integrate existing ones with CRM.

APIs like "Insert Records" and "Upload Attachments" can be used to add record information or files like text, image, video, etc..



## Points to remember while importing data into CRM

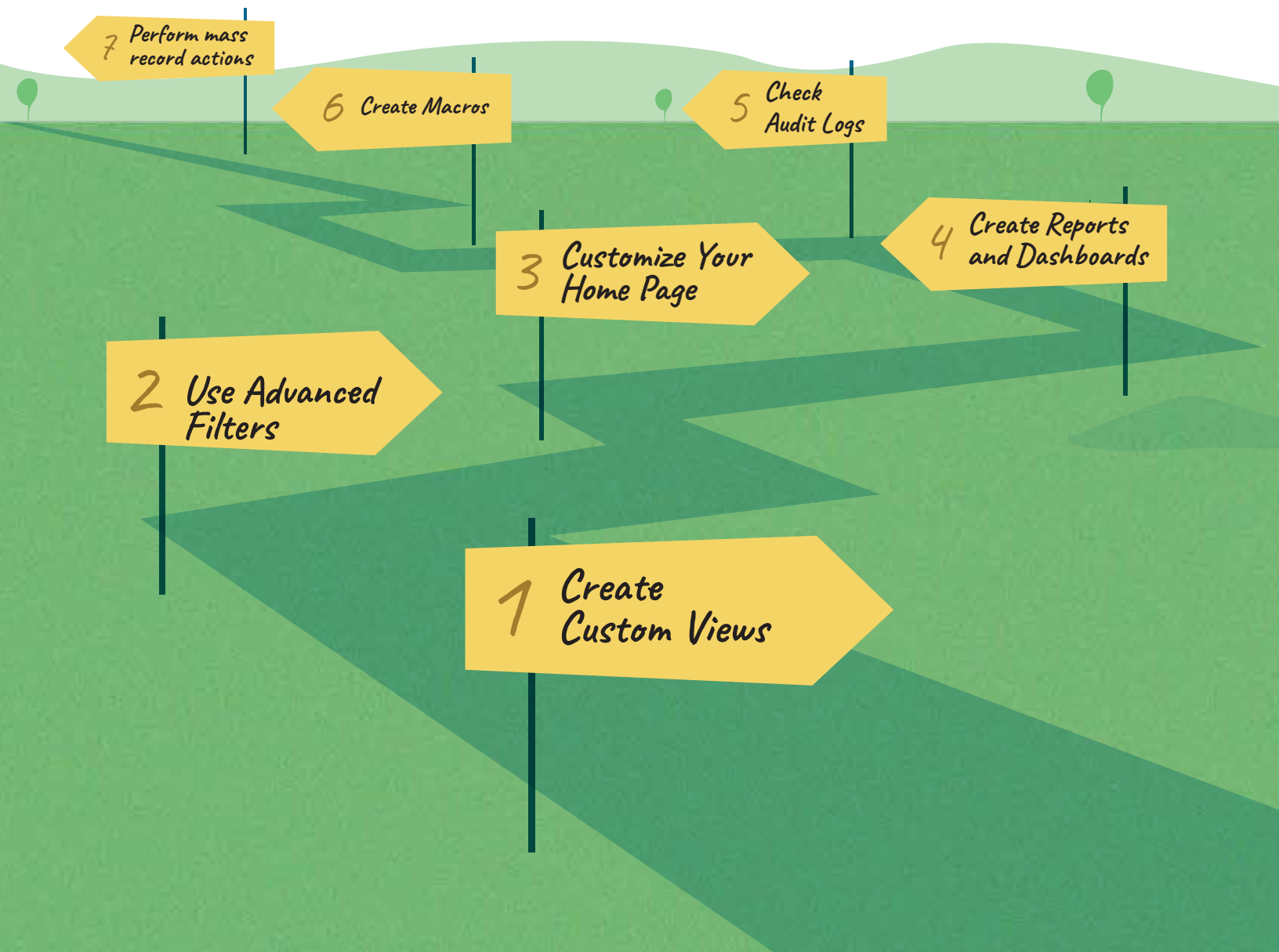
When you import data into CRM make sure you select any suitable assignment rules or follow-up tasks that you want to assign to users. Drafting an assignment rule won't quite do the trick; the right rule must be selected during import, web form creation, and APIs.

The screenshot shows a configuration panel for CRM import settings. It includes sections for 'Assign Lead Source', 'Assign Owner', and 'Assign Tasks'. The 'Assign Lead Source' section has a radio button for 'Select Lead Source to be assigned' and a dropdown menu set to '--None--'. The 'Assign Owner' section has radio buttons for 'Users' and 'Assignment Rules', with 'Assignment Rules' selected. Below this is a dropdown menu for 'Assign owner based on assignment rules' set to '--None--', with a 'Create Assignment Rule' link. The 'Assign Tasks' section has a dropdown for 'Add a task for new leads' set to 'Second follow-up', with a 'Create Workflow Task' link. A dropdown menu is open from the 'Assign owner based on assignment rules' dropdown, showing options: '--None--', 'Assignment based on lead source' (which is selected), and another '--None--' option.

While importing data, remember to select a "unique" field. A unique field is one which sets apart one record from another (for example, the email address or SSN). If you select SSN as the unique field during import, CRM looks for any other existing field with the same SSN as the one in your import sheet. If there is a match, it uses this field to identify duplicates. You can choose to skip duplicates, or clone/update existing records based on this unique field.

The screenshot shows a configuration panel for handling duplicates during import. It starts with the question 'What do you want to do with the records in the file?' and three radio buttons: 'Add as new leads' (selected), 'Update existing leads only', and 'Both'. Below this is a dropdown menu for 'Skip existing leads based on' set to '--None--'. A dropdown menu is open from this dropdown, showing options: '--None--' (selected), 'Lead Id', 'Title', 'Email', and 'Phone'. At the bottom are 'Cancel' and 'Next' buttons.

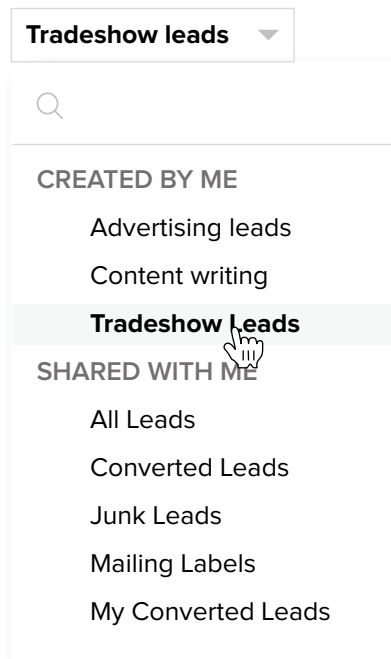
Part III  
Your tasks **AFTER** getting data into CRM





## #1 Create custom views

Congratulations! Once you have imported all modules into CRM, you can begin working on your leads. However, every day, as you keep adding data, you will end up looking at a long list of records in each module, which will make it difficult for you to work your way through it.



To help you group records of the same kind, Zoho CRM presents something called custom list views. For example, you want to create a view filtering all leads whose source is "Tradeshow." Or you want to filter all customers whose current status is "Not Contacted." You can create custom list views with these filters. This way, you can simply select the required list view and work with a small, organized set of records.

Creating these custom views helps a great deal in organizing your modules. You can use custom views for your own records and also advise your organization's users to create suitable custom views for their own accounts. Custom views can also be shared across users in an organization.

## #2 Use advanced filters

Advanced filters are, in essence, a search tool. The purpose of a search tool is to find records based on certain parameters such as "Find all records whose last name is Smith" or "Find all deals with an amount more than \$100,000."

Advanced filters are so called because, going beyond ordinary filters, these come with the ability for you to search based on multiple combinations of criteria. For example, you can instruct CRM to "find deals over \$10,000, closing this month, which have overdue tasks." You can further drill down the hunt by adding "Record owner" to the filters. This way you will get deals greater than \$10,000 belonging to a particular user that are "closing this month" but have tasks that are overdue. This can be obtained in a single click.

So, beyond just "finding" records, you are actually able to infer valuable insights from the records you have filtered. There is an entire range of search parameters for you to base your combinations on.

### Some more ideas:

- Leads created in the last six months, with no activity associated with them. You can initiate a follow-up with these idle leads.
- Contacts with open deals over \$20,000, who have not opened emails sent last week. You could send them an email again or make a follow-up call.
- Deals in the Negotiation stage with no notes or open activities. If this search returns any results, you'll know which deals you need to follow up with on a priority basis.

### Your activity:

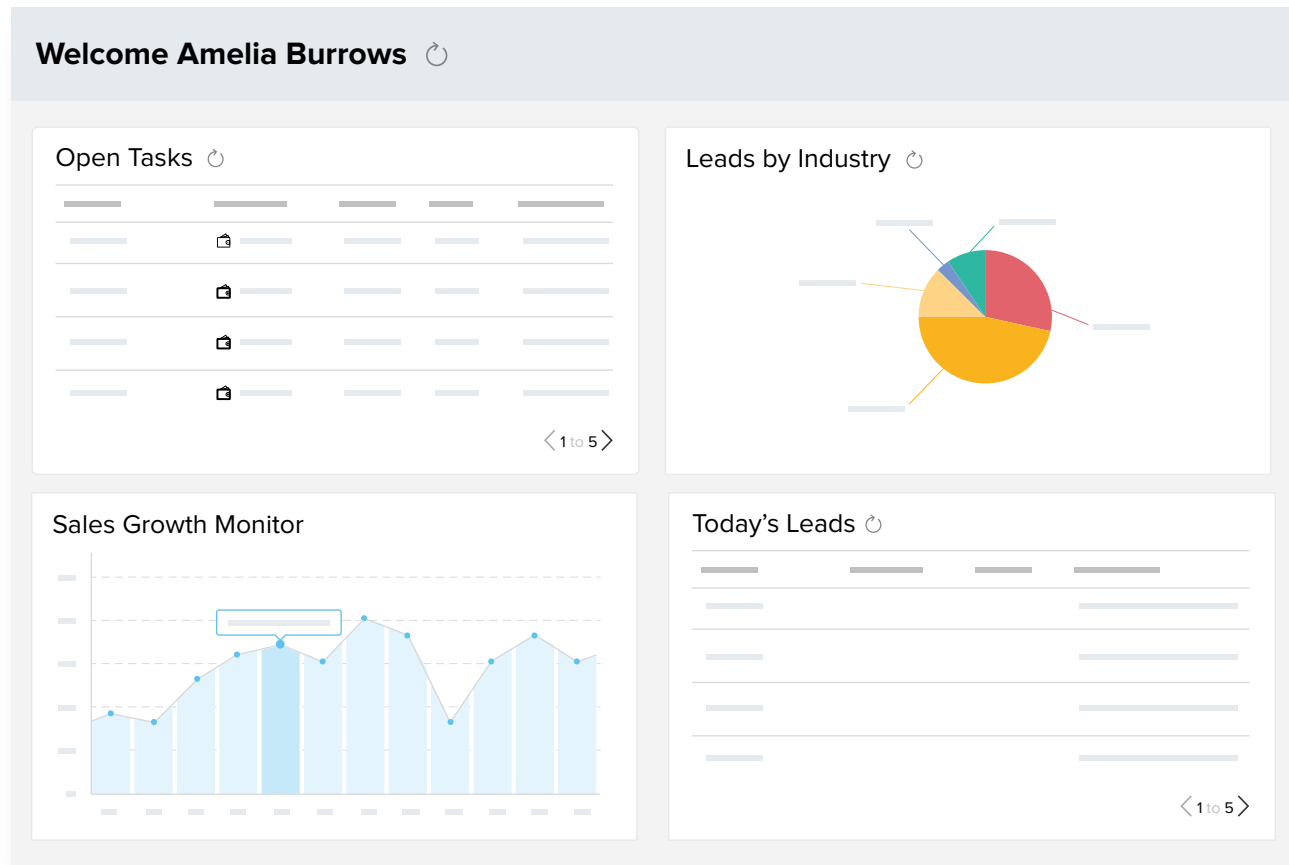
Jot down three ideas each for using custom views and advanced filters efficiently for your organization.

### Differences between advanced filters and custom views

Custom Views	Advanced Filters
The purpose of custom views is to organize records in a module by grouping them based on common parameters. Grouping records into custom views allows you to work your way through records easily.	Advanced filters are not meant to organize records, but to search for records based on a combination of criteria. They can be saved to be retrieved later.
<b>Example:</b> If Lead Source = Tradeshow, group these leads into a custom view called Tradeshow leads.	<b>Example:</b> Find all contacts with deals closing this month but that have overdue tasks.
Custom views can be private or shared with users across an organization.	Advanced filters are associated with custom views, so they cannot be independently shared with other users in an org.  If this advanced filter falls under a custom view that's shared with users, it will then be visible to those users.

### #3 Customize your Home page

As it's the first thing that you see when you log into Zoho CRM, the Home tab works as your daily planner. It groups the most important components that help you get started with your day, for instance your open tasks, events, and deals in the pipeline.



There are primarily two kinds of views on the Home tab: Classic View and Customized View.

1. The Classic view is Zoho CRM's default Home tab view. The components in this view cannot be changed by anyone.
2. The Customized view is further divided into two types: User's View and Shared View.
  - The User's view is what a particular user has created for themselves.
  - The Shared View is what an administrator has created and shared with specific users.

For example, a user called Jason could have all three types of Home tab views available to him.

- Classic View: His open tasks, events, and deals in the pipeline (uneditable).
- Jason's View: His tasks, tradeshow leads, and deals over \$50,000 (The Home tab view that Jason customized for himself).

- Shared View from Admin: The deals dashboard, and Leads from Google AdWords (the Home tab view that was shared with him by his admin).

## #4 Create reports and dashboards

As a manager you'd want to stay on top of your teams' activities in CRM. You may want to know how many deals you bagged this month, the total value of deals in your pipeline, how each sales rep in your organization has been faring, and so on. For this, Zoho CRM comes with a built-in set of reports for every module. You can also customize these.

The screenshot shows the 'All Reports' page in Zoho CRM. On the left is a navigation sidebar with 'All Reports' highlighted. The main content area has a search bar and action buttons. A list of reports follows, each with a checkbox and a star icon.

REPORT NAME
<input type="checkbox"/> ★ Key Accounts
<input type="checkbox"/> ★ Email and Call Analytics Report
<input type="checkbox"/> ★ Pipeline by Probability
<input type="checkbox"/> ★ Number of Check-Ins by Salesperson
<input type="checkbox"/> ★ Applicants by Ownership
<input type="checkbox"/> ★ 100% Target Achievers by Territory
<input type="checkbox"/> ★ Popular Solutions
<input type="checkbox"/> ★ Amount by Vendors
<input type="checkbox"/> ★ Purchase Orders by Status
<input type="checkbox"/> ★ Sales Cycle Duration Across Applicat So...
<input type="checkbox"/> ★ Contact Mailing List

Make sure you run these reports frequently. Once you have created the reports, you can create dashboards out of them. Dashboards are simply a pictorial representation of your reports in the form of charts. You can add these dashboards to your Home page as well.

**DASHBOARDS** ▼ (+)

Search

---

Favorites

Applicant Dashboards

Account and Contact Da...

**Potential Dashboards**

Campaign Dashboards

Case and Solution Dash...

Product Dashboards

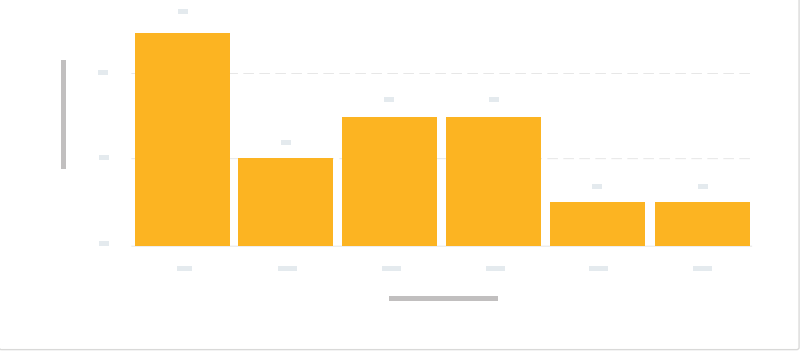
Inventory Dashboards

Sales Trend

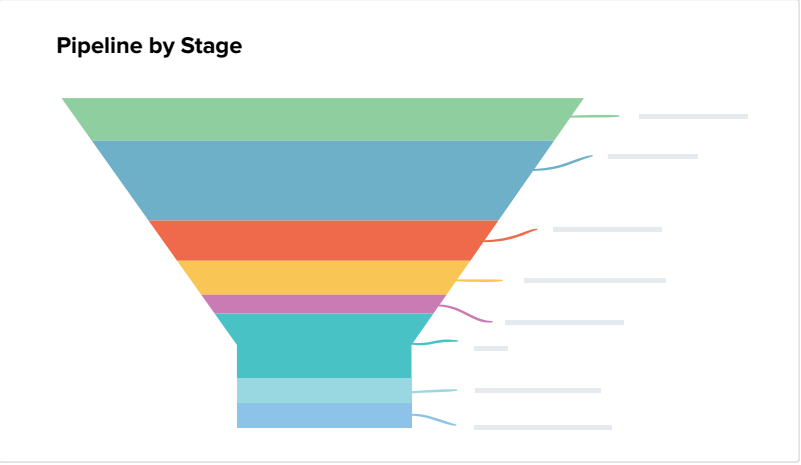
Sales Follow-up Trend

Territory Dashboard

### Potential Dashboards

### Pipeline by Stage



### Audit Log

The audit log provides you with a chronological sequence of actions performed by the users in Zoho CRM

[Export Audit Log](#)

RECENT ACTIVITY ▼

All Entities ▼

All Users ▼

All Actions ▼

Any time ▼

**Wednesday, Aug 01, 2018**

03:17 PM Amelia Burrows exported Audit Log

**Friday, Jul 27, 2018**

02:57 PM Amelia Burrows Added a Deal named [Zylker](#)

02:21 PM Amelia Burrows Added a Deal named [Zylker Tech App](#)

02:10 PM Amelia Burrows Created a Custom Field **CO-owner 2** in the Deal Mo...

✓ Any time

Today

Last 7 Days

Last 30 Days

On a Specific Date >

Date Range >

## #5 Check audit logs

Audit logs show a chronological record of activities in your CRM account. This section maintains a complete record of who did what, and when. You can filter logs based on the user, the module, actions, and time. Audit logs can also be exported into a spreadsheet.

## #6 Create macros

Macros are used to speed up a number of routine actions in CRM. These are especially useful while following up with leads. Often when you get off the phone with a lead, you may have to send them a follow-up email, and there might be a regular set of tasks to do. Say a sales rep on an average follows up with at least 25-30 leads per day. Following the same set of actions manually for every lead is going to be a hassle.

← View Macro

Name First follow-up actions

Description Series of first follow-up actions

*Actions*

- Send Email
  - Template: Welcome to Zylker
- Update Field


Field	New Value
Lead Status	Contacted

- Tasks
- Second follow-up

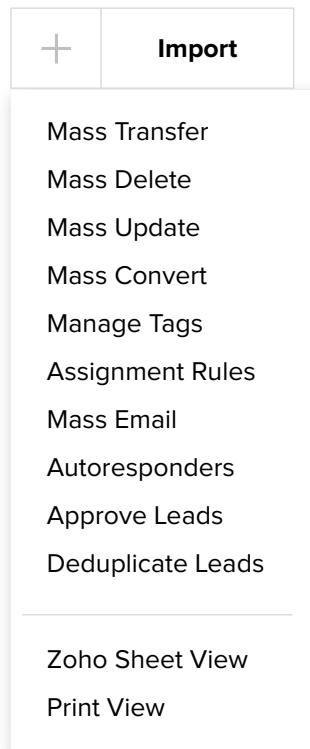
Done Edit Delete

Instead, you can create a macro with this set of routine actions. For example, you can create a macro that contains 1 Email + 1 task + 1 field update and call it "Lead 1st Followup." All you have to do is select a bunch of leads and Apply Macro on all of them. In one shot the same email, task, and field update will be executed for all the selected leads.

## #7 Perform mass record actions

Often, while maintaining databases, you will have a need to perform a set of actions for multiple records. For instance, let's say you have sent a follow-up email to all contacts that you interacted with at a particular trade show. Now, you want their Contact Status to read "Contacted." It is not practical for you to update each record one by one. It makes sense to run a mass update on these records and alter the status in one shot.

The following are the mass record actions available in Zoho CRM and when you might use them:



- **Mass email:**  
You want to send a general email about your list of services to a selected group of customers.
- **Mass update:**  
You want to update the value of the Lead Source field for a selected group of leads.
- **Mass transfer:**  
One of your employees has quit your organization, or is on vacation for a week, and you wish someone else to take over. You can mass transfer this person's records to a different user.
- **Mass delete:**  
You want to delete leads that have been marked as "Junk leads."
- **Mass convert (Applicable for Leads and Quotes):**  
You want to convert all leads with the lead source "Referrals," as they are all interested in purchasing from you.

# Further Resources

## **User Guide**

<https://www.zoho.com/crm/resources/>

## **FAQs**

<https://help.zoho.com/portal/kb/zoho-crm>











## **Videos**

<https://www.zoho.com/crm/resources/training-videos/>





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