

ZOHO CRM PROJECT

CRM Implementation & Automation for Fresh Net Organics

Your Name: MOHAMMED FAYD F

Date: July 2025

Logo:



Executive Summary

This portfolio highlights the comprehensive implementation of Zoho CRM for *Fresh Net Organics*, a fictional company specializing in the distribution of organic fruits, vegetables, and sustainable grocery products. The objective of this CRM project was to digitally transform the sales, marketing, and customer support processes using Zoho's powerful tools.

In today's highly competitive and data-driven market, CRM systems are not just optional—they are essential. Fresh Net Organics needed a solution that would help manage leads efficiently, streamline sales pipelines, improve customer engagement, and provide actionable insights. Zoho CRM offered an ideal solution, combining affordability, flexibility, and scalability.

Key Goals of the Project:

- Centralize all sales and customer information in a single cloud platform
- Track and convert leads into long-term customers
- Automate manual tasks like follow-up emails and reminders
- Improve visibility into sales performance through real-time dashboards
- Build lasting customer relationships with better segmentation and support

Why Zoho CRM?

Zoho CRM was selected due to its intuitive interface, customizability, integration with other Zoho tools (like Zoho Desk, Zoho Campaigns, and Zoho Analytics), and its strong reputation among small to medium-sized businesses. For Fresh Net Organics, Zoho provided:

- Lead capture forms integrated with our website
- Task automation for efficient follow-ups
- Sales pipelines with custom deal stages
- Smart dashboards to monitor performance metrics
- Seamless customer support tracking

What This Portfolio Covers:

This document walks through the CRM setup step-by-step—from adding company details and logo, to lead management, workflows, and reporting. Screenshots, annotations, and process descriptions help illustrate both the functionality of the software and the strategic thinking behind each decision. More than a software demo, this portfolio demonstrates how CRM can serve as the backbone of a customer-first business. Each section reflects a real-world application of CRM best practices tailored to a purpose-driven brand.

By the end of this project, Fresh Net Organics was fully equipped with a professional, automated, and scalable CRM system—ready to support its growth goals and create meaningful customer connections. “The future of sales lies in relationships—and the future of relationships is built on smart data.”

Company Setup & Branding

About Fresh Net Organics

Fresh Net Organics is a fictional D2C and B2B brand that sources, packages, and distributes farm-fresh organic produce across India. With increasing demand and customer base, the company requires a digital solution to streamline customer management and sales tracking.

Zoho CRM Setup Activities:

- Uploaded company logo and color theme
- Set time zone to IST (India Standard Time)
- Configured business hours (Mon–Fri, 9 AM–6 PM)
- Industry: Agriculture & Organic Retail
- Currency: INR (₹)
- Company Type: Private Limited

Contact Details Configured:

- Website: freshnetorganics.com
- Email: hello@freshnetorganics.com
- Phone: +91-6353252391

The screenshot displays the Zoho CRM Setup interface. On the left is a sidebar with a search bar and a menu containing sections like General, Company Settings, Security Control, and others. The main area is titled 'Setup' and has tabs for 'Company Details', 'Domain Mapping', 'Fiscal Year', 'Business hours', 'Holidays', 'Currencies', and 'Hierarchy Preference'. The 'Company Details' tab is active, showing information for 'Fresh Net Organics (25)'. It includes a logo, Org ID (60044226572), a description, email (tybwichigo09@gmail.com), phone (7736518325), and a location pin for 'FreshNest'. Below this is the 'Access URL' section with a URL: https://crm.zoho.in/crm/org60044226572/. The 'Locale Information' section shows the Time Zone as '(GMT 5:30) India Standard Time (Asia/Kolkata)'. The 'Team Licenses' section has a toggle switch and a note: 'Team Users can be added to access Team modules and have limited access to Organisation modules. Learn More'. At the bottom, there is a 'Smart Chat' bar with a 'Feedback on New UI' button and other utility icons.

Lead Management

Capturing and Organizing Leads

Lead management is the foundation of effective sales. Leads represent potential customers who have shown interest through various channels.

Lead Information Captured:

- Name
- Email & Phone
- Lead Source (Website, Referral, Instagram Ad, Expo, Cold Call)
- Status (New, Contacted, Qualified, Unqualified)
- Notes & custom fields

Sample Leads Added:

- Lewis King – Website
- Maria Blue – Referral
- Derick Hale – Instagram Ad
- Sabeer Ahmed – Expo
- Antony Star – Cold Call

Leads were filtered using views and tags to identify high-value prospects.

CRM Modules

Home

Leads

Contacts

Accounts

Deals

Tasks

Meetings

Calls

Products

Quotes

Sales Orders

Purchase Orders

Invoices

SalesInbox

Campaigns

Vendors

Price Books

Cases

CRM Teamspace

Today's Leads

Total Records 10

Filter Leads by

Search

System Defined Filters

Touched Records

Untouched Records

Record Action

Related Records Action

Locked

Latest Email Status

Activities

Campaigns

Cadences

Filter By Fields

Annual Revenue

City

Company

Converted Account

Converted Contact

Lead Name

All

Company

Email

Phone

10 Records Per Page

1 - 10

<input type="checkbox"/>	<input type="checkbox"/>	bonnie bennet	SnappyPets World	
<input type="checkbox"/>		xavi silva	WanderHut Travel Gear	
<input type="checkbox"/>		antony star	BeanWave Coffee Co.	
<input type="checkbox"/>		sabeer ahmed	FitMode Activewear	
<input type="checkbox"/>		silva andrew	VibePro Marketing	
<input type="checkbox"/>		derick hale	InnoLegal Consulting	Adve
<input type="checkbox"/>		maria blue	FleetLogic Logistics	
<input type="checkbox"/>		donald clew	TechNova HR Solutions (SaaS/Services – B2B)	Sales
<input type="checkbox"/>		lewis king	GlowNest Skincare (Retail/D2C – B2C)	Cold
<input type="checkbox"/>		david hector	GreenSpark Solar Solutions (Energy Industry – B2B)	Adve

Chats

Contacts

Here is your Smart Chat (Ctrl+Space)

Feedback on New UI

Ask Zia

Help

Lead Conversion Process

Converting Leads to Deals and Contacts

Once a lead is qualified, it is converted into a contact (person), an account (company), and optionally, a deal (sales opportunity). This is a crucial step in the CRM flow.

Conversion Flow Example:

- Lead: Lewis King → Converted to:
 - **Contact:** Lewis King
 - **Account:** Glownest Skincare
 - **Deal:** INR 60,000 – “Monthly Organic Supply”

Conversion ensures that only valuable leads enter the sales pipeline, helping the sales team stay focused.

Modules

Search

Home

Leads

Contacts

Accounts

Deals

Tasks

Meetings

Calls

Products

Quotes

Sales Orders

Purchase Orders

Invoices

SalesInbox

Campaigns

Vendors

Price Books

Cases

CRM Teamspace

Converted Leads

Total Records 5

Filter Leads by

Search

System Defined Filters

Touched Records

Untouched Records

Record Action

Related Records Action

Filter By Fields

Annual Revenue

City

Company

Converted Account

Converted Contact

Converted Deal

Country

Created By

Created Time

Email

Lead Name

All

Company

Phone

Email

Christopher Maclead (Sample)

Rangoni Of Florence

555-555-5555

christopher-maclead@noemail.invalid

Carissa Kidman (Sample)

Oh My Goodknits Inc

555-555-5555

carissa-kidman@noemail.invalid

James Merced (Sample)

Kwik Kopy Printing

555-555-5555

james-merced@noemail.invalid

sabeer ahmed

FitMode Activewear

lewis king

GlowNest Skincare (Retail/D2C – B2C)

Feedback on New UI

Ask Zia

Zia

Help

Deal Management & Sales Pipeline

At **Fresh Net Organics**, we use Zoho CRM to organize and monitor our sales deals through a visual pipeline. The **Kanban view** allows our team to manage opportunities effectively at every stage—from initial qualification to value proposition.

Pipeline Stages:

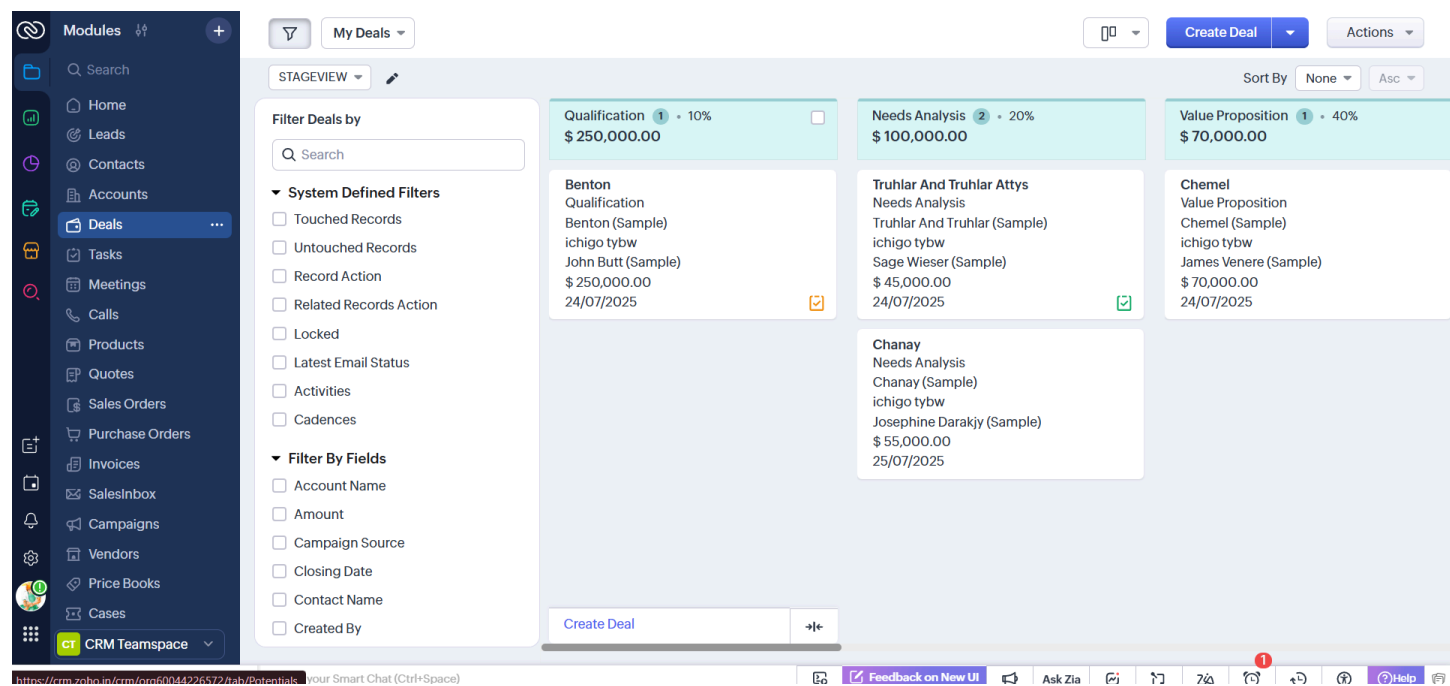
- **Qualification** – Identifying if the lead matches our target profile
- **Needs Analysis** – Understanding the customer’s specific needs
- **Value Proposition** – Presenting tailored offerings that solve the customer’s problems

Sample Deals in Pipeline:

- **Benton**
 - *Stage:* Qualification
 - *Account:* Benton (Sample)
 - *Owner:* ichigo tybw
 - *Value:* \$250,000.00
 - *Closing Date:* 24/07/2025
- **Truhlar and Truhlar Attys**
 - *Stage:* Needs Analysis
 - *Account:* Truhlar and Truhlar (Sample)
 - *Owner:* ichigo tybw
 - *Value:* \$45,000.00
 - *Closing Date:* 24/07/2025

Highlights:

- Visual Kanban layout improves tracking and prioritization
- Enables collaboration between reps and faster deal movement
- Better forecasting of revenue and pipeline health



Workflow Automation

In this project, I created **three workflow automation rules** in Zoho CRM to streamline lead follow-up, deal tracking, and task management. These workflows reduce manual work and ensure timely communication with prospects.

Featured Workflow: **Welcome Email ,Follow-Up**

- Module: Leads
- Trigger: On creation of a new lead
- Conditions: Lead Source = Website, Product Interest = Premium (optional)
- Actions:
 - Sends a branded Welcome Email to the new lead
 - Creates a follow-up task for the assigned sales rep (due in 2 days)

Benefits

- Automation ensures fast lead response
- Sales team stays aligned with timely tasks
- Standardized communication via email templates
- Improves overall lead conversion pipeline

Setup

Search

Modules and Fields

Pipelines

Wizards

Kiosk Studio

Canvas

Customize Home p...

Translations

Templates

Teamspace

Automation

Workflow Rules

Actions

Schedules

Assignment

Case Escalation Rules

Scoring Rules

Cadences

Process Managem...

Blueprint

RulesUsage

Workflow Rules

Workflow rules allow you to perform certain automatic actions on specific records based on filter criteria. Workflow automations can send emails, update fields, create records and much more.

Simply Build Data Processing! Introducing our Catalyst-powered solution for build CRM Operations, automating workflows with serverless functions and simplifying data handling.

Explore Now

Search

Reorder Rules

Create Rule

	Rule Name	All Modules	Execute On	Actions	Modified On	Status
<input type="checkbox"/>	Big Deal Rule	Deals	Create or Edit	1	23/07/2025	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Welcome Email ,Follow-Up	Leads	Create	1	24/07/2025	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Call new lead within 2 days	Tasks	Create	1	24/07/2025	<input checked="" type="checkbox"/>

Here is your Smart Chat (Ctrl+Space)

Feedback on New UI

Ask Zia

Zia

1

Help

Analytics & Reporting for Smarter Sales Decisions

Data is at the core of every decision at **Fresh Net Organics**. Zoho CRM provides in-depth reporting and dashboards to help us track, analyze, and improve sales performance.

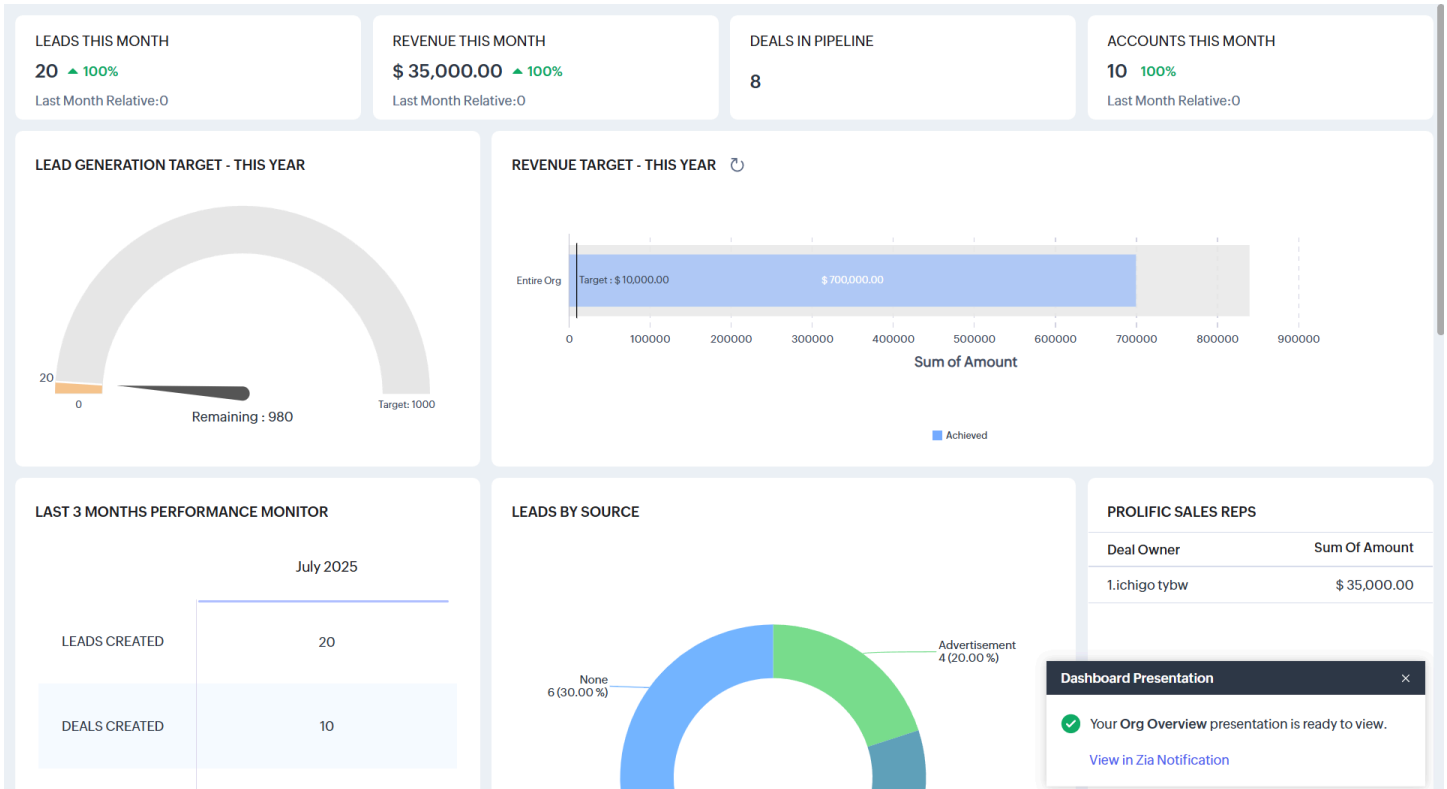
Key Sales Reports We Use:

- Sales Funnel Report
Tracks lead conversion across each pipeline stage to identify drop-offs and improvement areas.
- Deal Win/Loss Analysis
Reveals which deals were closed, lost, and why—helping refine strategies and training.
- Sales Activity Reports
Measures the number of calls, meetings, and emails by each rep—helping optimize productivity.
- Revenue Forecast Reports
Predicts future income based on deal stages, closing dates, and probabilities.
- Top-Performing Products Report
Highlights which organic products are in highest demand across different regions.

Dashboards & Insights:

- Visual dashboards show KPIs like monthly revenue, deals closed, rep performance, and pipeline value.
- Sales managers get real-time visibility into individual and team performance.
- Helps make data-backed decisions and quickly adapt to changing market trends.

By leveraging Zoho CRM analytics, we make our sales smarter, faster, and aligned with our business growth goals.



Key Learnings & Final Thoughts

Building this Zoho CRM portfolio for **Fresh Net Organics** offered deep insights into how customer relationships, sales, and data can align to drive meaningful business outcomes. This project didn't just showcase the platform's functionality—it helped illustrate how technology can support real-world business growth in the organic products industry.

Key Learnings from the Project:

1. **Centralized Data = Smarter Decisions**
By organizing all leads, deals, tasks, and contacts in Zoho CRM, Fresh Net Organics gained a 360-degree view of the sales pipeline, which is essential for managing growth.
2. **Automation Saves Time and Reduces Errors**
Workflows, task automation, and email triggers eliminated repetitive manual work. This allowed the team to focus more on building relationships and less on data entry.
3. **Custom Modules Reflect Unique Business Needs**
Zoho CRM's ability to create and tailor custom modules meant that even niche requirements (like tracking vendor partnerships or farm certification statuses) could be handled without needing external tools.
4. **Sales Stages Improve Forecasting**
The use of the Kanban view in Deals provided clear visibility into where each opportunity stood—helping prioritize high-value leads and close deals more efficiently.
5. **Customer Experience is at the Core**
Through integrations with Zoho Desk and follow-up automation, Fresh Net Organics ensured that every customer interaction was responsive, respectful, and human.

Final Thoughts:

This portfolio demonstrates not just technical skills in CRM usage but also an understanding of how CRM technology can transform business strategy. For Fresh Net Organics, Zoho CRM became more than a database—it became a partner in scaling operations, deepening customer trust, and increasing revenue.

Whether it's a small organic farm, a direct-to-consumer brand, or a wholesaler, Zoho CRM provides tools that adapt to the company's goals, pace, and growth vision.

“A CRM is not just software—it's the digital heartbeat of a customer-focused business.”