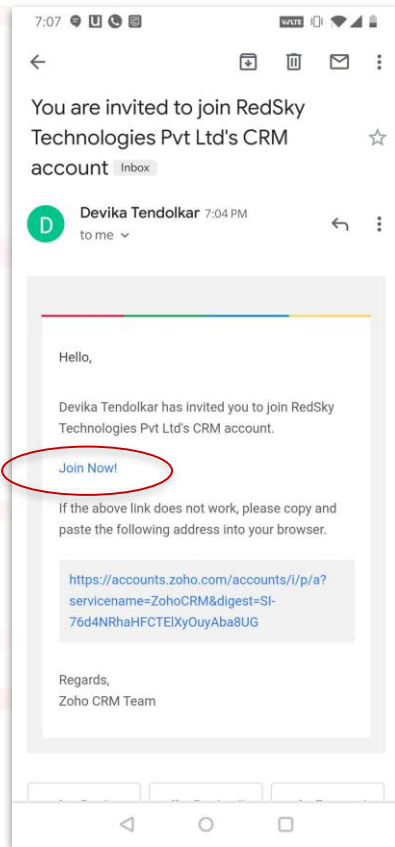


# **ZOHO & JARVIS LOGIN SETUP GUIDE**

# Zoho - How to login?

## STEPS TO CREATE ACCOUNT:

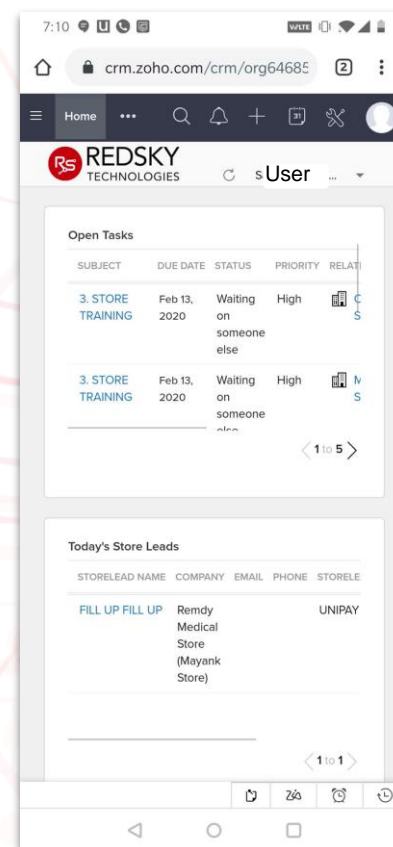
1. You will receive an invitation email to join the CRM account
  - Click on **Join Now!** link in the email
2. Registration page will open in your browser
  - Enter your name and create your password
3. Your ZOHO account is ready to use
  - You can now login with your username and password
4. Download Zoho CRM app and login now.



Step 1 - Receive Email

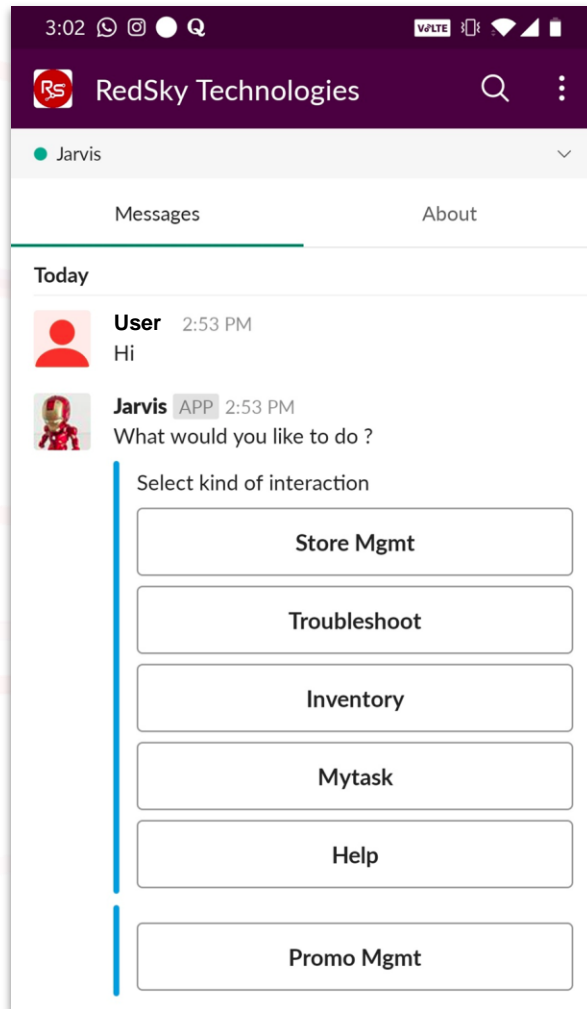


Step 2- Create Account



Step 3 - Home Page

# Jarvis Chat - How to login?



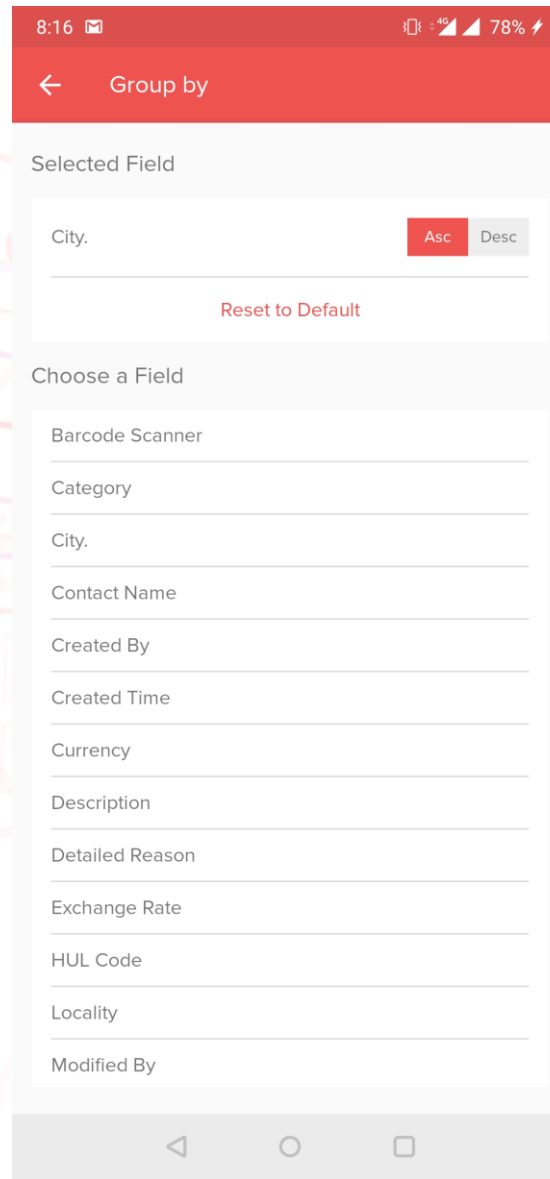
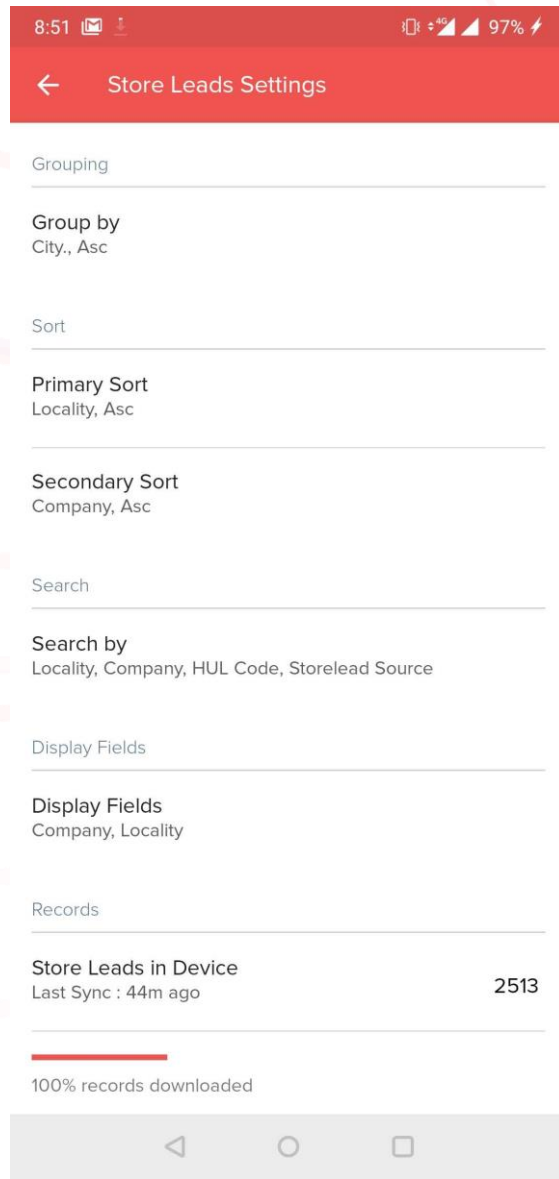
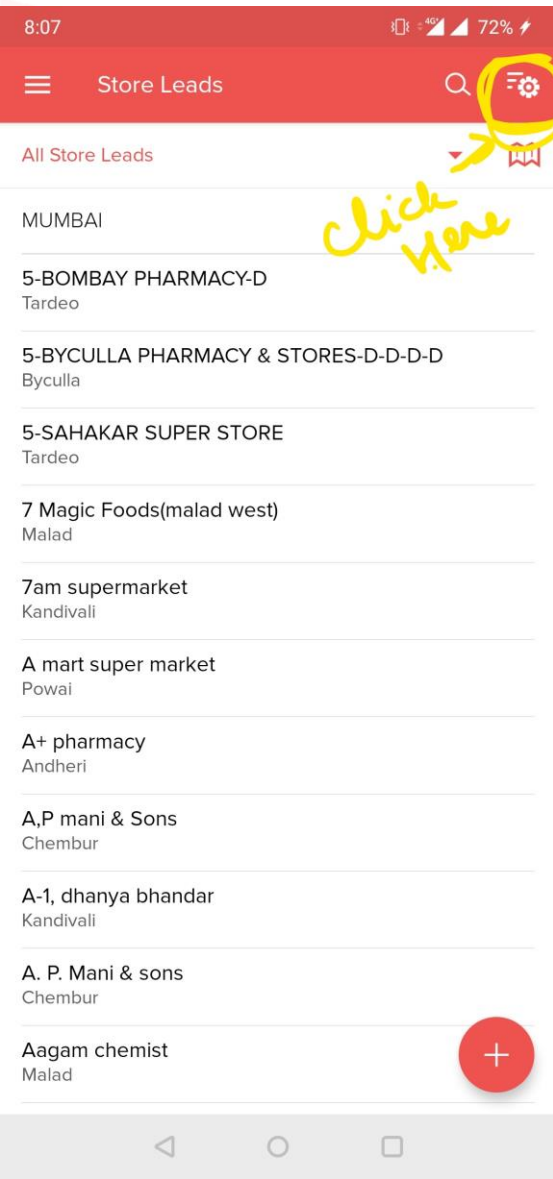
## STEPS TO ACCESS JARVIS CHAT:

1. Login to **Slack** with RedSky sign in
2. send message in group - Hi @Jarvis
3. In your first ever chat send **“Hi” twice**
4. Select task from the options from Jarvis' reply
5. From next time onwards start with a single time **“Hi”**

**Note:** If you dont see Jarvis in your group, ask your reporting manager to get that added

# **ZOHO CRM MOBILE APPLICATION CONFIGURATION**

# Store Leads Configuration



To configure store lead settings, refer left image.

Select all settings as shown in the middle image.  
Grouping - City.

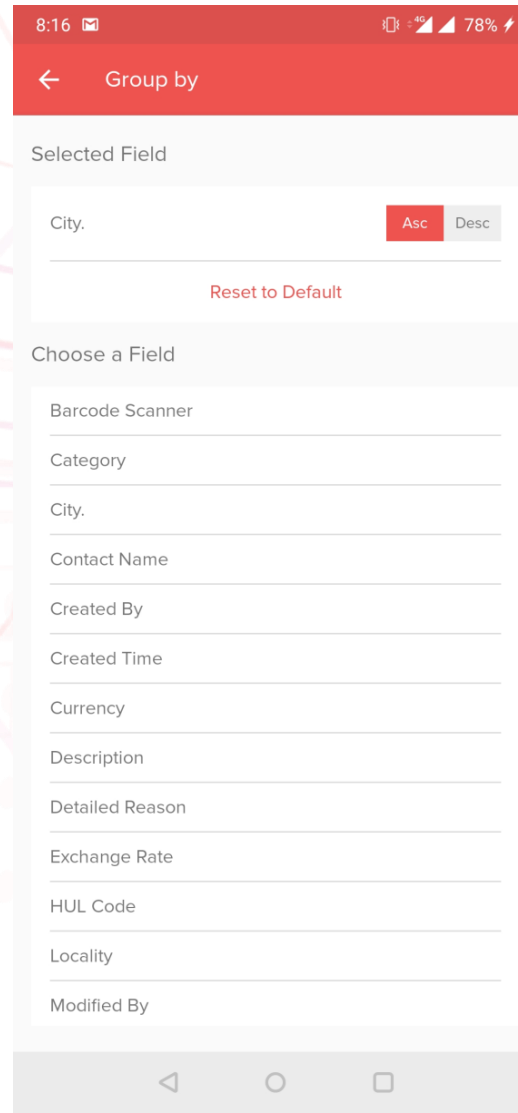
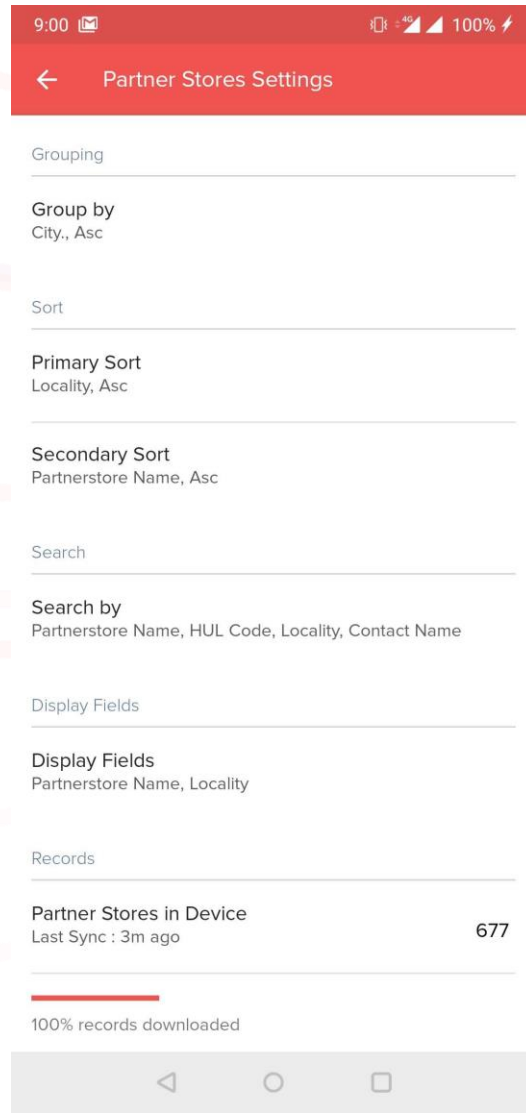
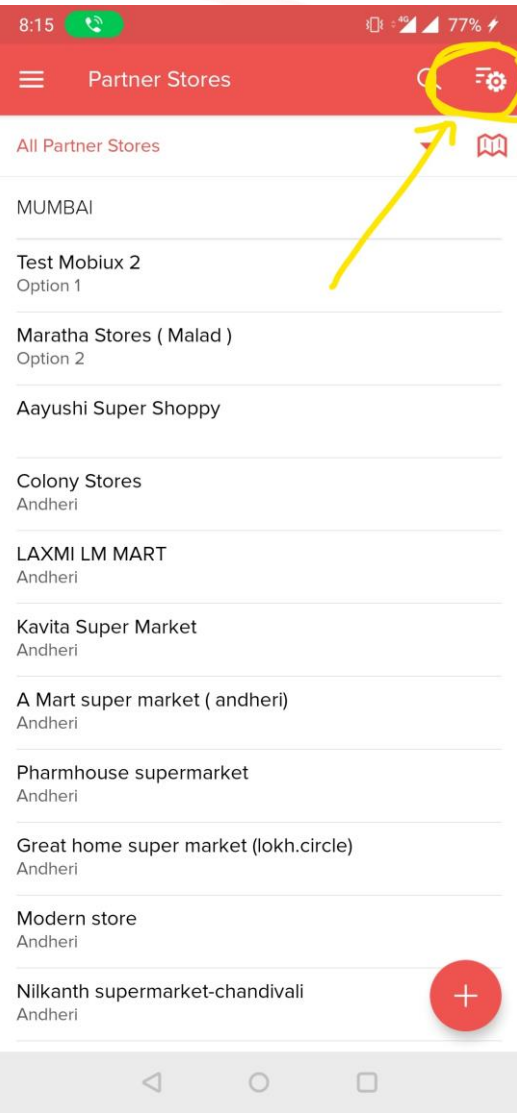
Primary Sort – Locality  
Secondary Sort – Company

Search: Locality, Company, HUL Code, any other field you want to search

Display Fields: Company, secondary: Locality

Rightmost image is a demonstration to select appropriate field.

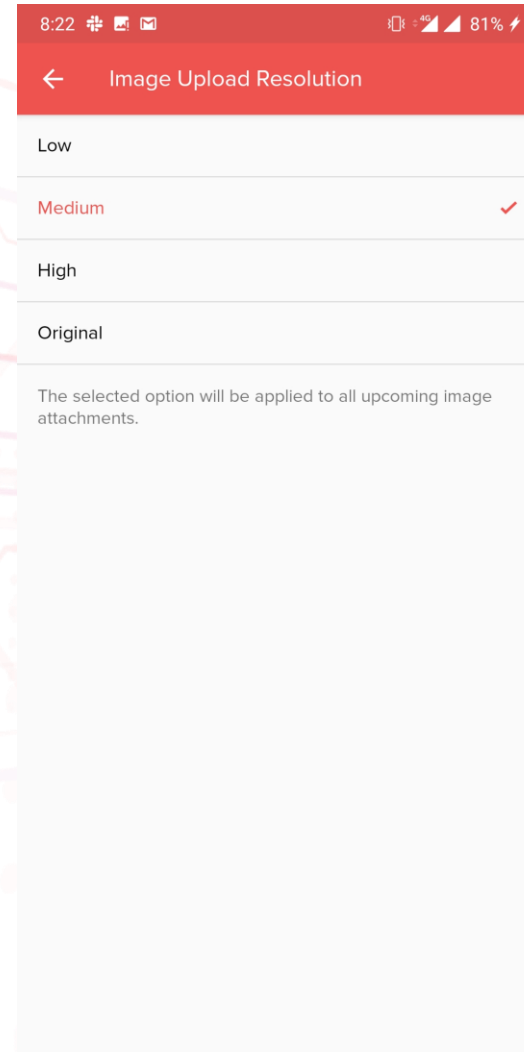
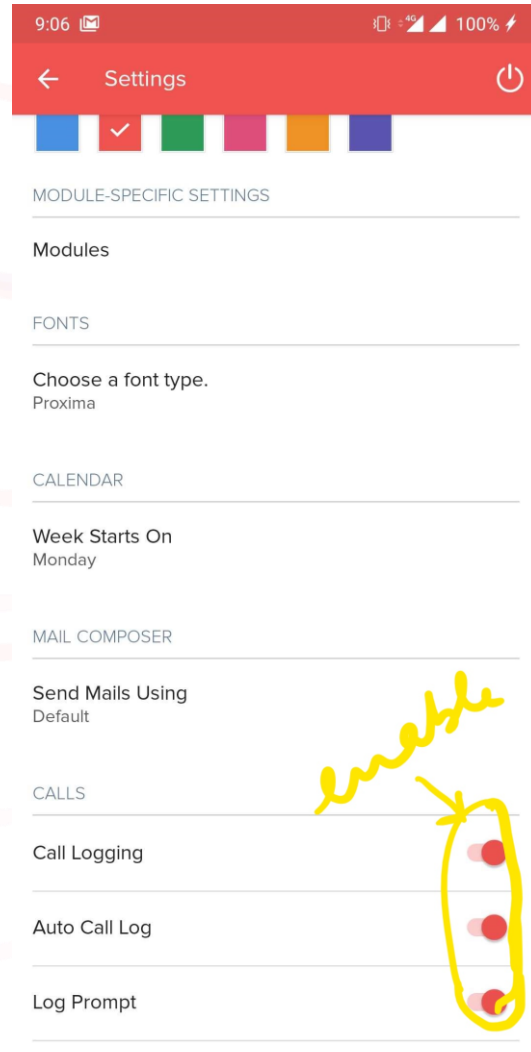
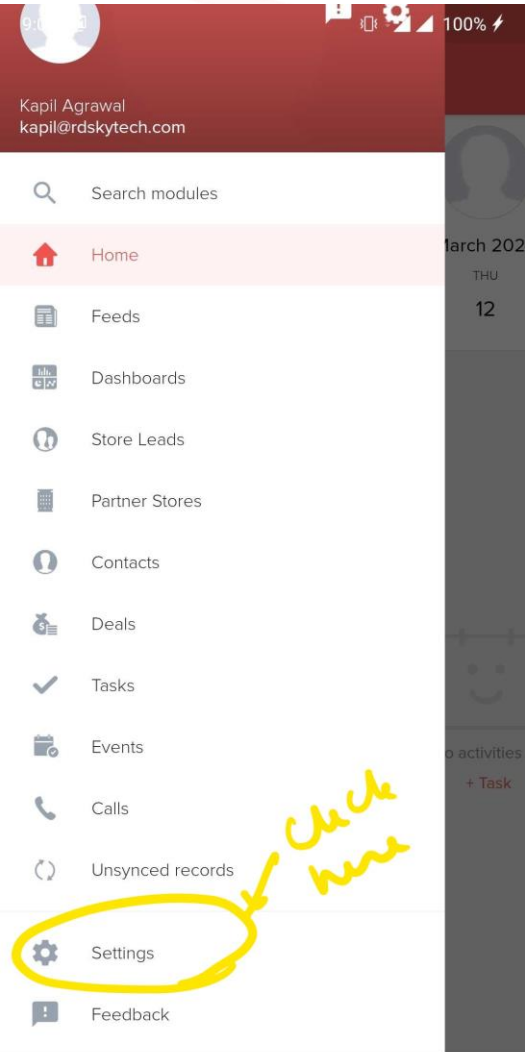
# Partnerstores Configuration



Similar to store leads, partnerstores need to be configured as displayed in the middle image.



# Application Settings



To ensure desired functioning of the application, please configure application as per suggested settings.