**ZOHO Instructions**

We have a 3 seat, free license. The seats are currently, Gary, Carl, Marvin. Marvin has not yet spent any time on ZOHO, so he can’t help us at this point.

ZOHO is ‘in the cloud’ so there is nothing residing on your computer. You can access ZOHO from any computer inside or outside the company. But, only access it from a computer that you have security confidence in, or we might find a bad e-mail being sent to all our customers or leads. E.g., no hotel computers.

ZOHO is not currently connected directly to Roladex or Outlook. To do so might involve such things as upgrading the service, getting Marvin to set it up and administer it, spending money on Microsoft Exchange server, or switching from the Outlook interface to the Gmail interface as our internal mail system. We’ll postpone any such ideas until January.

All customer contacts in the Roladex as of 10-24-11 are loaded into ZOHO.

Leads from Excel can be uploaded by Gary into ZOHO. Several dozen are in there now.

Gary is working on being able to run mail merge letters directly from ZOHO.

ZOHO has the potential to be a professional e-mail blast program for us, instead of using Outlook. The remains to be explored.

I evaluated Salesforce.com and Microsoft Dynamics as alternative CRM programs.

Salesforce.com would cost us about $3500/year and requires a lot of configuration.

Microsoft Dynamics would integrate well with Microsoft office and Outlook. Its cost would be $500 per person per year, and would require a Microsoft Exchange Server for at least $1000-2000 installation and startup. How difficult it is to use I don’t know. And, I don’t know how the fact that our e-mail is actually on Google would integrate with this.

**ZOHO Structure**

**Leads:** a person/institution we have imported and intend to solicit. Not a customer, and we haven’t quoted them.

**Accounts and Contacts**. These are our current customer base and any leads that we have advanced into the quote stage. (We convert the ZOHO Lead into a ZOHO Account when we hit this stage in the sales process). In ZOHO terminology a Contact name is part of an Account. Although a Lead has a company/institution name as part of its record, that does not make it an Account.

**Potentials.** In ZOHO when we issue a quote for new business that we want to actively follow up on (not current or routine business), we will create a Potential.

**Activities**. Specifically we will use the activity called **Task**. We create a Task to tell us to follow up or issue a quote, etc. on a certain date in the future. The list of tasks that shows on our personal ZOHO home page tells us what tasks we have due in the next several days.

**Notes.** When we have a conversation with a contact or lead that updates us on progress toward a sale, or gives us useful information about the account, we create a Note on that person’s page. This is how we keep a record of information on the account. We use this for account development information, but not usually for specific quote info, and not for work order related info. At least not at this point….

Log On

1. Logon to ZOHO which will bring you to your Home page
2. In the upper part of the screen find the red hypertext that says New Version. Click on this to use the new version.

Your open TASKs will be shown on your Home screen.

1. Click on a Task to open the Task.
2. You can modify most of the task information. Passing the cursor over the right inside edge of the Task Information box will make the word edit appear; click there and you can edit that information, for example, to change Status from Not Started to In Progess or Completed
3. Create new notes down below in the notes section and save them.
4. Click on the Activities menu item to see all your tasks. You can click on a column heading to have it order the tasks by date for example. Down at the bottom you can see an option to increase the number of tasks shown on that page.

Click on Leads or Contacts to find a specific individual

1. You can sort the columns by clicking on the column heading
2. In the upper right is a search window. Enter the name or account there to search for the person you are looking for.
3. When you have opened the person’s record, you can edit or add notes.
4. On the right side of the record is a menu for adding Potentials, Tasks, Events , Calls, Send E-Mail. We’ll use mostly the Tasks, sometimes the Potentials. Calls seems to be specifically for use in an outbound call center….not sure it applies to what we are doing. Not sure whether we should use E-mail since that means the e-mail record would be in ZOHO, not in Outlook, and any reply would come back to ZOHO. In future we might be able to integrate this to our G-mail to make things easier. For now, use Roladex for e-mails.