

JOB APPLICATION TRACKER – ZOHO CRM PROJECT

Welcome Priya

My Open Deals
30

My Untouched De...
5

My Calls Today
0

My Leads
10

My Open Tasks

Subject	Due Date	Status	Priority
Follow up with new lead	21/02/2026	Not Started	Highest
Follow up HR	22/02/2026	Not Started	Normal
Follow up with new lead	21/02/2026	Not Started	Highest
Follow up after interview	22/02/2026	Not Started	High
Follow up after interview	22/02/2026	Not Started	High
Follow up after interview	22/02/2026	Not Started	High

My Meetings

Seminar	12/02/2026 11:50 PM	13/02/2026 01:50 AM	Caris: Kidman (C)
Attend Customer conference	12/02/2026 05:30 AM	14/02/2026 05:29 AM	Felitz I Servic
CRM Webinar	12/02/2026 10:50 PM	13/02/2026 12:50 AM	Morlic Assoc
CRM Webinar	12/02/2026 09:50 PM	12/02/2026 10:50 PM	Felix I (Sample)
CRM Webinar	12/02/2026 09:50 PM	12/02/2026 10:50 PM	Bentc

Here is your Smart Chat (Ctrl+Space)
Feedback on New UI
Unread Chats
Channels
Contacts

Welcome Priya

Today's Leads

Lead Name	Company	Email	Phone
Jay Jason	ISBM	jay@test.com	55556666

My Deals Closing This Month

Ping	Qualification	Date
Genpact CS	Qualification	20/02/20
GlobalLogic BE	Qualification	28/02/20
Capgemini A	Qualification	20/02/20
Revature SE	Qualification	28/02/20
Amex A	Qualification	28/02/20
Concentrix CS	Qualification	21/02/20
Citi CS	Qualification	20/02/20
IBM D	Qualification	18/02/20

1 - 1 < >
1 - 10 < >

Here is your Smart Chat (Ctrl+Space)
Feedback on New UI
Unread Chats
Channels
Contacts

Welcome Priya

My Pipeline Deals By Stage

Applications by Status

Created from report - Job Status Summary Report

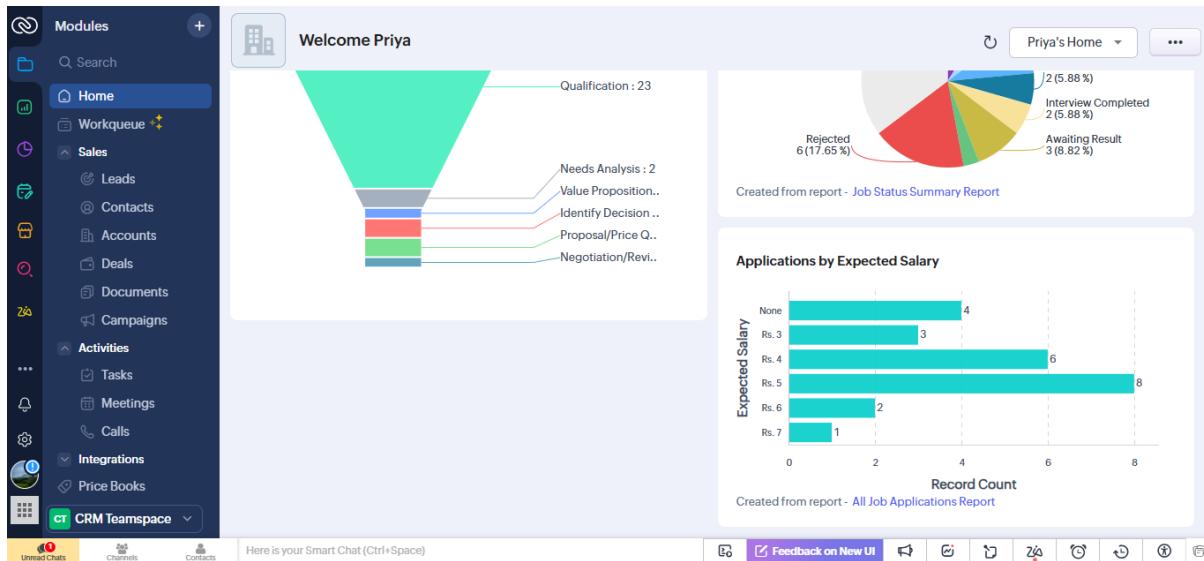
1 - 1 < >
1 - 10 < >

Applications by Expected Salary

Salary Range	Count
None	4

None
Feedback on New UI
Unread Chats
Channels
Contacts

JOB APPLICATION TRACKER – ZOHO CRM PROJECT



Total Records 11

Filter Leads by:

- System Defined Filters: Touched Records, Untouched Records, Record Action, Related Records Action, Scoring Rules, Locked, Latest Email Status, Activities, Campaigns, Cadences.
- Filter By Fields: Annual Revenue.

	Lead Name	All	Company	Email
<input type="checkbox"/>	Jay Jason	ISBM	jay@test.com	
<input type="checkbox"/>	Christopher Maclead (Sample)	Rangoni Of Florence	christopher-maclead@email.invalid	
<input type="checkbox"/>	Carissa Kidman (Sample)	Oh My Goodknits Inc	carissa-kidman@noemail.invalid	
<input type="checkbox"/>	James Merced (Sample)	Kwik Kopy Printing	james-merced@noemail.invalid	
<input type="checkbox"/>	Tresa Sweely (Sample)	Morlong Associates	tresa-sweely@email.invalid	
<input type="checkbox"/>	Felix Hirpara (Sample)	Chapman	felix-hirpara@email.valid	
<input type="checkbox"/>	Kayleigh Lace (Sample)	Printing Dimensions	kayleigh-lace@email.invalid	
<input type="checkbox"/>	Yvonne Tjepkema (Sample)	Grayson	yvonne-tjepkema@mail.invalid	
<input type="checkbox"/>	Michael Ruta (Sample)	Buckley Miller & Wright	michael-ruta@noemail.invalid	

Total Records 34

	Account Name	All	Phone	Website	Account Owner
<input type="checkbox"/>	Mat lab				Priya
<input type="checkbox"/>	Harman Tech				Priya
<input type="checkbox"/>	PING				Priya
<input type="checkbox"/>	HSBC				Priya
<input type="checkbox"/>	EY				Priya
<input type="checkbox"/>	Sutherland				Priya
<input type="checkbox"/>	Genpact				Priya
<input type="checkbox"/>	GlobalLogic				Priya
<input type="checkbox"/>	Capgemini				Priya
<input type="checkbox"/>	Cognizant				Priya
<input type="checkbox"/>	Revature				Priya
<input type="checkbox"/>	upGrad				Priya

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Filter Contacts by:

- System Defined Filters: Touched Records, Untouched Records, Record Action, Related Records Action, Scoring Rules, Locked, Latest Email Status, Activities, Campaigns, Cadences.
- Filter By Fields: Account Name.

Contact List:

	Contact Name	All	Account Name	Email
<input type="checkbox"/>	Rishi Kapoor	Mat lab		
<input type="checkbox"/>	Aron Dudley	XYZ Pvt. Ltd.		
<input type="checkbox"/>	Kris Marrier (Sample)	King (Sample)	krismarrier@noemail.alid	
<input type="checkbox"/>	Sage Wieser (Sample)	Truhlar And Truhlar (Sample)	sage-wieser@noema valid	
<input type="checkbox"/>	Leota Dilliard (Sample)	Commercial Press (Sample)	leota-dilliard@noem ail.invalid	
<input type="checkbox"/>	Mitsue Tollner (Sample)	Morlong Associates (Sample)	tollner-morlong@noi ail.invalid	
<input type="checkbox"/>	Simon Morasca (Sample)	Chapman (Sample)	simonm@noemail.in d	
<input checked="" type="checkbox"/>	Donette Foller (Sample)	Printing Dimensions (Sample)	foller-donette@noen invalid	
<input checked="" type="checkbox"/>	Capla Paprocki (Sample)	Feltz Printing Service (Sample)	capla-paprocki@noe l.invalid	

Filter Deals by:

- System Defined Filters: Touched Records, Untouched Records, Record Action, Related Records Action, Scoring Rules, Locked, Latest Email Status, Activities, Campaigns, Cadences.
- Filter By Fields: Account Name, Amount.

Deal List:

	Qualification	Needs Analysis	Value Proposition
<input type="checkbox"/>	Rs. 2,60,000.00	Rs. 1,00,000.00	Rs. 70,000.00
<input type="checkbox"/>	Mat lab Qualification Mat lab Priya Rishi Kapoor	Truhlar And Truhlar Attys Needs Analysis Truhlar And Truhlar (Sample) Priya Sage Wieser (Sample) Rs. 45,000.00 13/02/2026	Chemel Value Proposition Chemel (Sample) Priya James Venere (Sampl Rs. 70,000.00 13/02/2026
<input type="checkbox"/>	Harman Qualification Harman Tech Priya 26/02/2026		
<input type="checkbox"/>	Ping Qualification PING Priya 27/02/2026	Chanay Needs Analysis Chanay (Sample) Priya Josephine Darakjy (Sample) Rs. 55,000.00 14/02/2026	
<input type="checkbox"/>	HSBC A		

GlobalLogic BE

Related List:

- Notes
- Connected Records
- Attachments
- Stage History 1
- Competitors
- Cadences
- Open Activities 2
- Closed Activities
- Products
- Quotes
- Sales Orders
- Contact Roles
- Emails
- Cases

Overview Timeline:

START: 18/02/2026 | CLOSING: 28/02/2026

Qualification → Needs Analysis → Value Proposition → Identify Decision Makers → Proposal/Price →

Deal Details:

Deal Owner	Priya
Stage	Qualification
Probability (%)	10
Expected Revenue	-
Closing Date	28/02/2026

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← GlobalLogic BE Add Tags

Related List

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- Sales Orders
- Contact Roles
- Emails
- Cases
- Invoices

Overview Timeline Last Update : 1 day(s) ago

Next Action

- FEB 22 Follow up after interview
- FEB 22 Follow up after interview

Hide Details

Deal Information

Deal Owner	Priya	Amount	—
Deal Name	GlobalLogic BE	Closing Date	28/02/2026
Account Name	GlobalLogic	Stage	Qualification
Position Applied	Backend Engineer	Job Location	—
Expected Salary	Rs. 5	HR Email	—

← GlobalLogic BE Add Tags

Related List

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- Stage History 1
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- Cadences
- Open Activities 2
- Closed Activities
- Products
- Quotes
- Sales Orders
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- Emails
- Cases
- Invoices

Overview Timeline Last Update : 1 day(s) ago

Account Name	GlobalLogic	Stage	Qualification
Position Applied	Backend Engineer	Job Location	—
Expected Salary	Rs. 5	HR Email	—
Job Status	Awaiting Result	Interview Date	—
Reason for Rejection	—	Probability (%)	10
Type	New Business	Expected Revenue	—
Next Step	—	Campaign Source	—
Lead Source	—	Created By	Priya Wed, 18 Feb 2026 01:10 PM
Contact Name	—		
Modified By	Priya Thu, 19 Feb 2026 06:53 PM		

← GlobalLogic BE Add Tags

Related List

- Notes
- Connected Records
- Attachments
- Stage History 1
- Competitors
- Cadences
- Open Activities 2
- Closed Activities
- Products
- Quotes
- Sales Orders
- Contact Roles
- Emails
- Cases
- Invoices

Overview Timeline Last Update : a while ago

No records found

Open Activities

Open Tasks 2		Open Meetings 0
Follow up after interview 22/02/2026 Priya	Status : Not Started Priority : High	No records found
Follow up after interview 22/02/2026 Priya	Status : Not Started Priority : High	No records found

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Rules Usage

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 [Workflow Creation using Zia](#) Reorder Rules Create Rule

<input type="checkbox"/>	Rule Name	All Modules	Execute On	Actions	Modified On	Status
	Big Deal Rule	Deals	Create or Edit	0	12/02/2026	On
	New Lead Follow-up T...	Leads	Create	1	17/02/2026	On
	Follow Up HR	Deals	Create	1	18/02/2026	On
	Interview Follow-Up A...	Deals	Create or Edit	1	19/02/2026	On
	Job Rejection Automat...	Deals	Modified	1	19/02/2026	On

Email Notifications Tasks Field Updates Webhooks Actions by Zoho Flow 

Email Notifications

Email notifications let users know a particular event has occurred.

Email Notifications Usage

Search Create Email Notification

<input type="checkbox"/>	Name	No. Of Recipients	All Modules	Email Template	Modified On
	Rejection Mail	1	Deals	Job Rejection Email	19/02/2026
	Follow up HR	1	Deals	Big Deal Alert	18/02/2026
	Big Deal Alert	1	Deals	Big Deal Alert	12/02/2026

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[← Lead Priority Score](#)

Scoring rule is Active. [Deactivate](#) [...](#) [?](#)

Leads - All Layouts Type - Manual Score

Scoring leads based on interest level

Leads Fields

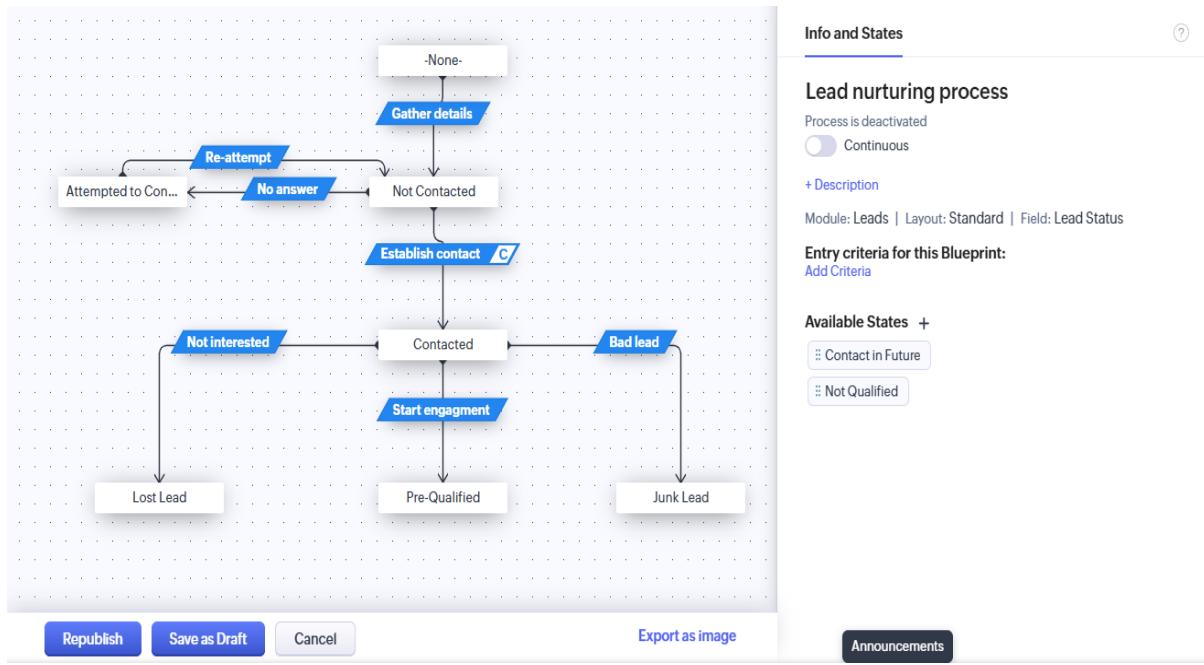
- 1. Lead Source IS Employee Referral Add 10 Points
- 2. City IS Mumbai Add 5 Points

Add Criteria

[Add channel](#)

Would you like to add score fields to the records ? Yes, proceed

[Save](#) [Cancel](#)



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Import Summary of JobApplications.xlsx

X

Total records in the file 19

19 Added Records 0 Updated Records 0 Skipped Records

[Download list of records with warnings](#)

Row Number	Deal Name	Amount	Stage	Closing Date	Account Name	Contact Name	Deal Owner
2	Infosys SE		Qualification	20/02/2026	Infosys		Priya
3	TCS A		Qualification	25/02/2026	TCS		Priya
4	Accenture D		Qualification	28/02/2026	Accenture		Priya
5	Persistent Technologies SE		Qualification	20/03/2026	Persistent Technologies		Priya
6	IBM D		Qualification	18/02/2026	IBM		Priya

[Undo this import](#)

Users Groups Activate Users

Active Users (3) [+ New User](#)

Search

 Priya CEO, Super Admin heyhipri@gmail.com	 Priya Super Admin CEO at Inkspire ✉ heyhipri@gmail.com ☎
<input type="checkbox"/>  Sales Intern Job Application Executive, Standard intern@test.com	TeamSpace Information Associated To  CRM TeamSpace
<input type="checkbox"/>  Sales Manager Job Application Manager, Administrator manager@test.com	Locale Information  Language English (United States) Country Locale India Date Format DD/MM/YYYY

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The screenshot shows the Zoho CRM interface. On the left, there's a sidebar with various icons for navigation. The main area is titled "Templates". Inside, there are three items listed:

- Job Rejection Email (Deals . Update Regarding Your Job Application)
- Rejection Mail (Deals . Interview not cleared)
- Big Deal Alert (Deals . Big Deal Alert)

To the right, a modal window titled "Job Rejection Email" is open, showing a preview of the email content. The preview includes a red header with the text "We're sorry to see you go!", a message body with a placeholder for the recipient's name, and a signature at the bottom. There are tabs for "Preview" and "Analytics", and a "Edit" button.

The screenshot shows the "Validation Rule for 'Job Status'" configuration screen. At the top, there are buttons for "Cancel" and "Save". Below that, there are dropdown menus for "Execute rule" (set to "When criteria is met") and "Validate On" (set to "Save Only").

The main part of the screen is a flowchart titled "WHEN". It starts with "Job Status", followed by "Validate using criteria", and ends with "Rejected". A callout box next to the "Rejected" step states: "This rule will be applied for all records". To the right of the flowchart, there are settings for "Validation Preference" (radio buttons for "Stop with error" and "Allow by alert"), and an "Alert Message" input field containing the placeholder "Please enter reason for losing this job application".