ZOHO CRM

USER MANUAL



Introducing ZOHO CRM

Customer relationship management (CRM) is a concept that contributes towards customer benefits and the growth of businesses. The goal of CRM is to increase customer faith and to make business profitable. It is also defined as developing, managing, and maintaining good relationship with customer. The data can come in the form of customer location, demographics, habits, personal information, etc. All these data can be used by organizations to sell and purchase products and services. The most popular CRMs is ZOHO CRM. It is a cloud-based CRM hosted and access on any product device through internet. CRM is all about storing and managing customer data.

# Target and audience

Customer relationship management is all about practices, strategies, and technologies. The use of technologies is to manage and analyse the data. The main aim of CRM is to improve customer relationships and to take forward customer growth. Storing information of your customer in CRM helps in analysing the data. This methodology can help in improving sales of businesses. This ZOHO CRM user manual is for ZOHO application users who may find the manual useful which accessing and performing tasks.

# Support and feedback

ZOHO CRM is largely used all over world, which has a strong approach in increasing leads, good sales, and great performance. It is easy to operate and to custom CRM for any businesses. Many CRMs are too costly in market and ZOHO CRM offers free software. ZOHO CRM also offers many options to help for safety of businesses and secure data of customer. Customer satisfaction plays a great role in ZOHO CRM software.

For support and feedback, click on support@zohopeople.com

Features of ZOHO CRM

**Following are the features of ZOHO CRM:**

* **Reporting**- Helps to generate reports for various sales related quotations and deals.
* **Forecasting**- Helps to generate future predictions for sales based on data.
* **Quotes**- Helps to generate quotations for various sales deals.
* **Document management**-Helps to collect, to store, and to share documents.
* **Lead management**- Helps to advertise, to trade, and to market.
* **Contact management**-Helps to store contact information such as names and addresses.
* **Campaign Management**-Helps to plan and to execute the sales product.
* **Case Management**-Helps to manage the customer request and to respond them.

Logging on to ZOHO CRM

ZOHO CRM Provides an easy login process. This chapter discusses the following topics:

* [To create an account](#_To_create_an)
* [To log on to an account](#_To_log_on)
* [To retrieve password](#_To_retrieve_password)

# To create an account

1. Type <https://www.zoho.com/in/crm> on the web address bar of your browser. The ZOHO CRM page appears.
2. Under the **Get Started** with your Free Trial section, do the following:
3. Type your full name in the **Full Name** text field.
4. Type your email address in the **Email** text field.
5. Type the phone number in the **Phone** text field.
6. Accept the Terms of Service and Privacy Policy.
7. Click **Get Started**.

# To log on to an account

1. Type <http://www.zoho.com/crm/login.html> on the web address bar for your browser. The ZOHO CRM log in page appears.
2. Click Sign In. The **Sign in to access CRM** page appears.
3. Type your registered email address in the **Email** text field.
4. Click **Next**.
5. Type the password in the **Password** text field.
6. Click **Next**.

# To retrieve password

1. From the **Sign in to access CRM** page, click **Forget Password**? The Forgot Password page appears.
2. Type your registered email address in the **Email** text field.
3. Type the given CAPTCHA In the **Enter** **CAPTCHA** text field.
4. Click **Next**.
5. Click the Don’t remember?
6. Click the **Send OTP** button. The OTP is sent to your registered email address.
7. Type the OTP number in the **OTP** text field.
8. Click **Verify**, the **Create Password** page appears.
9. Type the new password in the **New Password** text field.
10. Retype the new password in the **Retype Password** text field.
11. Click **Change Password**.

Managing Contacts

This chapter contains various functions of contact, such as to create, edit, delete, and import contacts.

* [To view contact](#_To_view_contact)
* [To create a contact](#_To_create_a_1)
* [To delete a contact](#_To_delete_a)
* [To edit a contact](#_To_edit_a)
* [To import notes](#_To_import_notes)
* [To import contacts](#_To_import_contacts)

# To view contact

1. On the ZOHO CRM home page, click **Contacts**. The **All Contacts** page appears.
2. Click the **contact** to view their information.

# To create a contact

1. On the **All Contacts** page, click the **Create Contact** button. This page displays contact information such as image, address, and description. We have documented each of these sections separately in a simple format.

**To Add Contact Information:**

1. From the **Contact Owner** list, click the list owner. By default, list owner is the CRM account holder.
2. From the **Lead Source**, select the source for the lead.
3. Type the first name of the contact in the **First Name** text field.
4. Type the last name of the contact in the **Last Name** text field.
5. From the **Account Name** list, click the account list of the contact. You can add new account as well.
6. Type the email address in the **Email** text field.
7. Type the title of the contact in the **Title** text field.
8. Type the name of the department in the **Department** text field.
9. Type the phone number in the **Phone** text field.
10. Type the alternate phone number in the **Other Phone** text field.
11. Type the fax number of the contact in the **Fax** text field.
12. Type the home phone number in the **Home Phone** text field.
13. Type the date of the birth in the **Date of Birth** text filed.
14. Type the secondary email in the **Secondary Email** text field.
15. Add the twitter account in the **Twitter** text field.
16. Type the skype id in the **Skype ID** text field.

**To Add Address Information:**

1. Type the mailing street name in the **Mailing Street** text field
2. Type the other street name in the **Other Street** text field.
3. Type the mailing city name in the **Mailing City** text field.
4. Type the other city name in the **Other City** text field.
5. Type the mailing state name in the **Mailing State** text field.
6. Type the other state name in the **Other State** text field.
7. Type the zip code in the **Zip** text field.
8. Type the other zip code in the **Other Zip** text field.
9. Type the mailing country name in the **Mailing Country** text field.
10. Type the other country name in the **Other Country** text field.

**To Add Description Information:**

1. Type description in the **Description** text field.
2. Click the **Save** button to accept the changes.

# To delete a contact

1. On the **All Contacts** page, select the check box next to the contact that you want to remove.
2. Click the **more** iconon the top right corner. The list appears.
3. Click **Delete**. The confirmation message appears.
4. Click **Delete**.

# To edit a contact

1. On the **All Contacts** page, click the **Edit** button in the contact.
2. Edit contact page appears, the page displays information such as **Contact, Address,** and **Description** information to edit.
3. Edit the information, and click **Save.**

# To import contacts

1. On the **All Contacts** page, click the **Create Contact** dialog button. The drop down appears with the list options.
2. Select Import Contacts. Import Contacts page appears.
3. **Browse** the file to import or choose a **CRM** from which you like to import.
4. Click **Next**.
5. Click **Import**. The confirmation message appears.
6. Click **Yes** **to Continue**.

# To import notes

1. On the **All Contacts** page, click the **Create Contact** dialog button. The drop down appears with the list options.
2. Select Import Notes.
3. **Browse** the file to import.
4. Click **Next.**
5. Click **Import**. The confirmation message appears.
6. Click **Yes to Continue**.

Managing Leads

Managing leads is the sales process, in which the leads are analysed and developed to make sales ready. Following are the lead functions:

* [To view leads](#_To_view_leads)
* [To create a lead](#_To_create_a_2)
* [To edit a lead](#_To_edit_a_1)
* [To delete a lead](#_To_delete_a_1)
* [To import notes](#_To_import_leads)
* [To import leads](#_To_import_leads)

# To view leads

1. On the ZOHO CRM home page, click **Leads**. The **All Leads** page appears.
2. Click the **Lead** to view their information.

# To create a lead

1. On the **All Leads** page, click the **Create Lead** button. The create Lead page appears. This page displays lead information such as image, address and description. For your understanding, we have documented each of these sections as separate.

**To Add Lead Information:**

1. From **Lead Owner** list, click the list owner. By default, the list owner is the CRM account holder.
2. From the **Lead Source**, click the source for the lead.
3. Type the first name of the lead in the **First Name** text field.
4. Type the last name of the lead in the **Last Name** text field.
5. Type the title of the lead in the **Title** text field.
6. Type the email address in the **Email** text field.
7. Type the phone number in the **Phone** text field.
8. Type the fax number in the **Fax** text field.
9. Add number of employees in **Number of Employees** text field.
10. Type the website in the **Website** text field.
11. From the **Industry**, click the industry for the lead.
12. Type the company name in the **Company** text field.
13. Type the annual revenue in the **Annual Revenue** text field.
14. From the **Lead Status**, click the status of the lead.
15. Type the skype id in the **Skype ID** text field.
16. Type the twitter account in the **Twitter** text field.
17. Type the secondary email address in the **Secondary** **Email** text field.

**To Add Address Information:**

1. Type the street name in the **Street** text field.
2. Type the city name in the **City** text field.
3. Type the state name in the **State** text field.
4. Type the Country name in the **Country** text field.
5. Type the zip code in the **Zip Code** text field.

**To Add Description Information**:

## Type the description in the Description text field.

1. Click the **Save** button to accept the changes.

# To edit a lead

1. On the **All Leads** page, click the **Edit** button in the lead.
2. Edit lead page appears, the page displays information such as **Contact, Address**, and **Description** information to edit.
3. Edit the information, and click **Save**.

# To delete a lead

1. On the **All Leads page, select the check box next to the lead that you want to remove.**
2. Click the **more** icon on the top right corner. This list appears.
3. Click **Delete.** The confirmation message appears
4. Click **Delete**.

# To import leads

1. On the **All Leads** page, click the **Create Lead** dialog button.
2. Select the Import Leads. The Import Leads page appears.
3. **Browse** the file to import.
4. Click **Next.**
5. Click **Import**. The confirmation message appears.
6. Click the **Yes to Continue.**

# To import notes

1. On the **All Leads** page, click the **Create Lead** dialog button. The drop down appears with the list options.
2. **Browse** the file to import.
3. Click **Next.**
4. Click **Import**. The confirmation message appears.
5. Click **Yes to Continue.**

Managing Accounts

This chapter refers to various functions of an account, such as to edit, create, delete and import accounts.

* [To view accounts](#_To_view_accounts)
* [To create an account](#_To_create_an_1)
* [To delete an account](#_To_delete_an)
* [To edit an account](#_To_edit_an)
* [To import accounts](#_To_import_accounts)
* [To import notes](#_To_import_notes_1)

# To view accounts

1. On the ZOHO CRM home page, click **Accounts**. The All Accounts page appears.
2. Click the **account** to view their information.

# To create an account

1. On the **All Accounts** page, click the **Create Account** button. This page displays account information such as image, address, and description. We have documented each of these sections separately in a simple format.

**To Add Account Information:**

1. From **Account Owner** list, click the list owner. By default, the list owner is the CRM account holder.
2. From the **Rating** list, click the ratings of the account.
3. Type the phone number in the **Phone** text field.
4. Type the account site in the **Account** **Site** text field.
5. Type Fax number of the account in the **Fax** text field.
6. Type the website in the **Website** text field.
7. Type the account number in the **Account Number** text field.
8. Type the ticker symbol in the **Ticker Symbol** text field.
9. From the account type, click the **Type** of the account.
10. From the ownership, click the **Ownership** of the account.
11. From the industry, click the type of the industry.
12. Type the annual revenue in the **Annual revenue** text field.
13. Type the number of employees in the **Employees** text field.
14. Type the SIC CODE in the **SIC CODE** text field.

**To Add Address Information:**

1. Type the billing street name in the **Billing Street** text field.
2. Type the shipping street name in the **Shipping Street** text field.
3. Type the billing city name in the **Billing City** text field.
4. Type the shipping city name in the **Shipping City** text field.
5. Type the billing state name in the **Billing State** text field.
6. Type the shipping state name in the **Shipping State** text field.
7. Type the code in the **Billing Code** text field.
8. Type the code in the **Shipping Code** text field.
9. Type the billing country name in the **Billing Country** text field.
10. Type the shipping country name in the **Shipping Country** text field.

**To Add Description Information**:

## Type the description in the Description text field.

## Click the Save button.

# To edit an account

1. On the **All Accounts** page, click the **Edit** button in the account.
2. Edit account page appears, the page displays information such as **Contact, Address**, and **Description** information to edit.
3. Edit the information, and click **Save**.

# To delete an account

1. On the **All Accounts** page, select the check box next to the account that you want to remove.
2. Click the **more icon on the top right corner. The list appears.**
3. Click **Delete.** The confirmation message appears.
4. Click **Delete.**

# To import notes

1. On the **All Accounts** page, click the **Create Account** dialog button. The drop down appears with list.
2. Select the Import Notes. The Import Notes page appears.
3. **Browse** the file to import.
4. Click **Next.**
5. Click **Import**. The confirmation message appears.
6. Click **Yes to Continue.**

# To import accounts

1. On the **All Accounts** page, click the **Create Account** dialog button. The drop down appears with the list.
2. Select Import Accounts. The Import Accounts page appears.
3. **Browse** the file the to import or choose a **CRM** from which you like to import.
4. Click **Next.**
5. Click **Import**. The confirmation message appears.
6. Click **Yes to Continue.**

Managing Deals

This chapter describes various functions of a deal, such as to edit, create, delete and import deals.

* [To view deals](#_To_view_deals)
* [To edit a deal](#_To_edit_a_2)
* [To create a deal](#_To_create_a_3)
* [To delete a deal](#_To_delete_a_2)
* [To import deals](#_To_import_deals)
* [To import notes](#_To_import_notes_2)

# To view deals

1. On the ZOHO CRM home page, click **Deals**. The All Deals page appears.
2. Click the **deal** to view their information.

# To edit a deal

1. On the **All Deals** page, click the **Edit** button in the deal.
2. Edit deal page appears, the page displays information such as **Contact,** and **Description** information to edit.
3. Edit the information, and click **Save**.

# To create a deal

1. On the **All Deals** page, click the **Create Deal** button. This page displays deal information such as image, address, and description. We have documented each of these sections separately in a simple format.

**To Add Deal Information:**

1. From **Deal Owner** list, click the list owner. By default, the list owner is the CRM account holder.
2. From the **Lead Source**, click the source for the deal.
3. From the **Stage**, click the stage for the deal.
4. Type the deal name in the **Deal Name** Text field.
5. Type the expected revenue in the **Expected Revenue** text field.
6. Type the account name in the **Account Name** text field.
7. From the **Type**, select the type of the deal.
8. Type the amount in the **Amount** text field.
9. Type the probability number in (%) in the **Probability** text field.
10. Type the next step in the **Next Step** text field.
11. Type the closing date in the **Closing Date** text field.
12. Type the contact number in **Contact** text field.

**To Add Description Information:**

1. Type description in the **Description** text field.
2. Click the **Save** button.

# To delete a deal

1. On the **All Deals** page, select the check box next to the deal that you want to remove.
2. Click the **more** icon on the top right corner. The list appears.
3. Click **Delete.** The confirmation message appears.
4. Click **Delete**.

# To import deals

1. On the **All Deals** page, click the **Create Deal** dialog button. The drop down appears with the list.
2. Select the Import Leads. The Import Leads page appears.
3. **Browse** the file to import or choose a **CRM** from which you like to import.
4. Click **Next**.
5. Click **Import**. The confirmation message appears.
6. Click **Yes to Continue.**

# To import notes

1. On the **All Deals** page, click the **Create Deal** dialog button. The drop down appears with the list.
2. Select the Import Notes. The Import Notes page appears.
3. **Browse** the file to import.
4. Click **Next**.
5. Click **Import**. The confirmation message appears.
6. Click **Yes to Continue.**

Managing Activities

This chapter describes the various types of functions, such as Task, Meeting, and call.

* [To view activities](#_To_view_activities)
* [To create a task](#_To_create_a)
* [To host a meeting](#_To_host_a)
* [To make a call](#_To_make_a)

# To view activities

1. On the ZOHO CRM home page, click **Activities**, All Activities page appears.
2. Click the activity to view their information.

# To create a task

1. On the ZOHO CRM dashboard, click **Activity**. The activity page appears.
2. To create a task, click the **+ Task** dialog button.
3. The **Create Task** page appears.
4. From **Task Owner** list, click the list owner. By default, the list owner is the CRM account holder.
5. Type the subject in the **Subject** text field.
6. Type the due date in the **Due Date** text field.
7. Type the contact number in the **Contact** text field.
8. Type the account number in the **Account** text field.
9. From the **Status**, click the status of the task.
10. From the **Priority**, click the priority of the task.
11. Set the **Reminder** for the task.

**To Add Description Information:**

1. Type description in the **Description** text field.
2. Click **Save**.

# To host a meeting

1. On the ZOHO CRM dashboard, click **Activity**. The activity page appears.
2. To host a meeting, click the **+Meeting** dialog button.
3. The **Create Meeting** page appears.
4. Type the name in the **Contact** text field.
5. Type the location in the **Location** text field.
6. Select the **Check Box**, for making the meeting online.
7. Select the Start date and End date, and the time.
8. From the **Host** list, click the list. By default, the name is CRM account holder.
9. Type the description in the **Description** text field.
10. Set the **Reminder** of the task.
11. Click **Save**.

# To make a call

1. On the ZOHO CRM dashboard, click **Activity**. The activity page appears.
2. To create a call, click the **+Call** dialogbutton.
3. The **Create Call** page appears.
4. Select the **Contact Name** from the drop down.
5. Type the subject in the **Subject** text field.
6. Select the **Call Purpose** from the purpose list.
7. Select the **Related To** from the related list.
8. Select the **Call Type** from the list.
9. Select the **Call Details** for call.
10. Type the description in the **Description** text field.
11. Select the **Call Result** from the call list.
12. Click the **Start Calling** dialog button.

FAQ

**Frequently Asked Questions (FAQs)**

1. How to change the password?

**Solution:** Refer [To retrieve password](#_To_retrieve_password).

1. How to create an account?

**Solution:** Refer [To create an account](#_To_create_an).

1. How to log on to an account?

**Solution:** Refer[To Log on to an account](#_To_log_on).

1. Do ZOHO CRM provides free access to user?

**Solution:** Yes, ZOHO CRM offers free access to every user.

1. How to host a meeting?

**Solution:** Refer[To host a meeting](#_To_host_a).

1. How to create a call?

**Solution:** Refer[To make a call](#_To_make_a).

1. How to create a task?

**Solution:** Refer[To create a task](#_To_create_a).

1. From where we can browse the ZOHO CRM?

**Solution:** Google Chrome, Opera, Safari, and Mozilla Firefox.

1. Is ZOHO assist secure?

**Solution:** Yes, it is absolutely secure.

1. How to access ZOHO support?

**Solution:** Call: 1800-102-9646, +91 44-46447100