

REPORTS CREATION + VIEW

The screenshot shows the Zoho CRM Reports interface. At the top, there are buttons for 'Create Report', 'Create Report Folder', and 'Report Scheduler'. Below these, the 'Recently Accessed Reports' section displays a table of reports.

Report Name	Report Folder Name	Description	Edit	Customize
Invoice summary-Bernice	Accounts Report	Jan-Mar 2016		
Medical Report for CW	Medical team	Medical		
Visa: Monthly GP report	Visa team	Derek		
Medical: Clinic appointment today	Medical team	For medical team		
Clients by Industry	Accounts Report	Clients from various industries.		
Clarence	Accounts Report	Zoho email list		
Invoice for RQ	Accounts Report			
Report for RQ	Accounts Report	1/10/15-19/10/15		
Medical: Month Report Last Month	Medical team	Last Month ONLY, For Andreas		

Below the table, there are links to 'Accounts Report' and 'Potential Reports'. The bottom of the screen shows a Windows taskbar with various application icons and a system clock indicating 6:09 PM on 7/7/2016.

EXAMPLE REPORT SUMMARY- User is able to customize report to pull relevant fields from client/invoice template + filter the results accordingly after report created

The screenshot shows the Zoho CRM Custom Report page for 'Visa: Monthly GP report'. The page includes a sidebar with 'Recently Accessed Reports' and 'All Reports'. The main content area displays the report title and a message about the maximum number of records (2000) that can be listed in each page.

Filter Options:

Column: Start Date: End Date:

Buttons:

Displaying 1 to 99

Date of request	Invoice Date	Client Name	Company (for employee only)	Referred by	Nationality	Invoice type	Invoice number	Service Name	Description	Qty	Embassy/other charges	Total
	01/06/2016	HUSKY CNOOC MADURA LIMITED				V	16/88/05	Indonesia - VTT 312 - More than 6 months		1	225	\$361.00

The bottom of the screen shows a Windows taskbar with various application icons and a system clock indicating 6:10 PM on 7/7/2016.

https://crm.zoho.com/crm/CustomReport.do?actionItem=run&reportId=1476737000000241032&repType=summary&folderId=1476737000000249381

All Reports

- Accounts Report
- Potential Reports
- Lead Reports
- Activity Reports
- Campaign Reports
- Case and Solution Re...
- Forecast Reports
- Service Reports
- Vendor Reports
- Quote Reports
- Sales Order Reports
- Purchase Order Repor...
- Invoice Reports
- Sales Metrics Report...
- Territory Reports
- Medical team
- Medical Report for C...
- Medical: case from c...

Export Save As Customize Reload Hide Details Delete Report

Displaying 1 to 99

Date of request	Invoice Date	Client Name	Company (for employee only)	Referred by	Nationality	Invoice type	Invoice number	Service Name	Description	Qty	Embassy/other charges	Total
	01/06/2016	HUSKY CNOOC MADURA LIMITED				V	16/88/05	Indonesia - VTT 312 - More than 6 months		1	225	\$361.00
	01/06/2016	HUSKY CNOOC MADURA LIMITED				V	16/88/05	Visa concierge - Ulink airport transfer (Two way)		1	20	\$150.00
	01/06/2016	CNOOC SES LTD				PV	16/89/05	CNOOC SES - Indonesia - VTT 312 - 1 year		1	225	\$361.00
	01/06/2016	CNOOC SES LTD				PV	16/89/05	Develop Photo		1		\$15.00
	01/06/2016	CNOOC SES LTD				PV	16/89/05	Hotel booking fee		1		\$25.00
	01/06/2016	CNOOC SES LTD				PV	16/89/05	Airport transfer (Two way)		1	105	\$140.00

Here is your Smart Chat (Ctrl + Space)

contact-icons-png-15.png merged_document_...pdf wechat.png merged_document_...pdf Show all downloads...

6:10 PM 7/7/2016

CLIENT LIST

https://crm.zoho.com/crm/ShowTab.do?module=Accounts

Zoho CRM

Subscription Setup Help

Home Clients Reports Services Invoices Activities Dashboards Projects

All Territories All Clients

+ New Client Import Client Tools

Delete More Actions

Client Name	Company (for employee only)	Modified Time
<input type="checkbox"/> Kim Hyun Jin		07/07/2016 17:01
<input type="checkbox"/> James Tompkins		07/07/2016 16:17
<input type="checkbox"/> Richard Rudder Batrina		07/07/2016 15:39
<input type="checkbox"/> William Cahyadi Thamrin		07/07/2016 15:26
<input type="checkbox"/> JENTAR WIJAYA		07/07/2016 12:15
<input type="checkbox"/> Sean Leslie Michael O'Reilly		05/07/2016 16:42
<input type="checkbox"/> Sheree Hall		05/07/2016 17:00
<input type="checkbox"/> Ms Laura Berardi		05/07/2016 16:39
<input type="checkbox"/> Kim Hyun Jin		07/07/2016 17:39
<input type="checkbox"/> Eliwaty Tjitra		05/07/2016 09:35
<input type="checkbox"/> Matthew Robert Gordon	PT Arlie Labora Utama	04/07/2016 16:48
<input type="checkbox"/> Hamid Djiiman Kotong		05/07/2016 18:22

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CLIENT CREATION

Matthew Robert Gordon

Client Owner : Visa 1 Change

Phone :

General Information

Client Owner	Visa 1 Change	Date of birth	08/11/1978
Client Name	Matthew Robert Gordon	Passport number	M7206958
Client type	Employee	Email	MATTHEW.GORDON@GRES.CO MAU
Company (for employee only)	PT Arie Labora Utama	Phone	
Gender	Male	Fax	
Nationality	Australian	Referred by	
Country of residence	Australia	Other referral	
If other nationality/country, please specify		Opt out	

Billing Address

Billing Street

Quick Actions

Add a new task

Receivables & Payables

Links

Add

What's Links?

Here is your Smart Chat (Ctrl + Space)

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Matthew Robert Gordon

Client Owner : Visa 1 Change

Phone :

Billing Address

Billing Street

Billing City

Billing State

Billing Code

Billing Country

-----MEDICAL-----

Medical - If yes, please tick

Ulink Can Claim

If No

Consultation

Date arranged		Appointment date and time	
Doctor		Clinic	
Specialty		Other doctor	
Info/other services		Remarks	
Referring doctor (US Emb)		Follow up date	
Referring doctor email			
Follow up person			

Quick Actions

Add a new task

Here is your Smart Chat (Ctrl + Space)

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https://crm.zoho.com/crm/EntityInfo.do?module=Accounts&id=1476737000001747021

Discharge date

LOG

LOG - If yes, please tick

LOG

Amount covered		Other coverage	
LOG issued date		Invoice date	
		Invoice number	

VISA

Visa - If yes, please tick-

Visa

Visa requested by	Company	Visa type	Indonesia - VKU 211
Date of request	01/07/2016	Visa type 2	
Remarks -		Visa type - If others, please specify	
Invoice date-	04/07/2016	Invoice number-	

HOTEL

Hotel - If yes, please tick

Hotel

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INVOICING

https://crm.zoho.com/crm/CreateEntity.do?module=Invoices

Create Invoice

Save Save & New Cancel

Edit Page Layout

Invoice Information

Invoice Owner	Manager	Invoice Date	07/07/2016
Client Name		Date of service	dd/mm/yyyy
* Subject		Currency	SGD
ATTN		Invoice type	-None-
JDA Invoice code		Remarks	
Bechtel Invoice code			
Employee			
Revised			

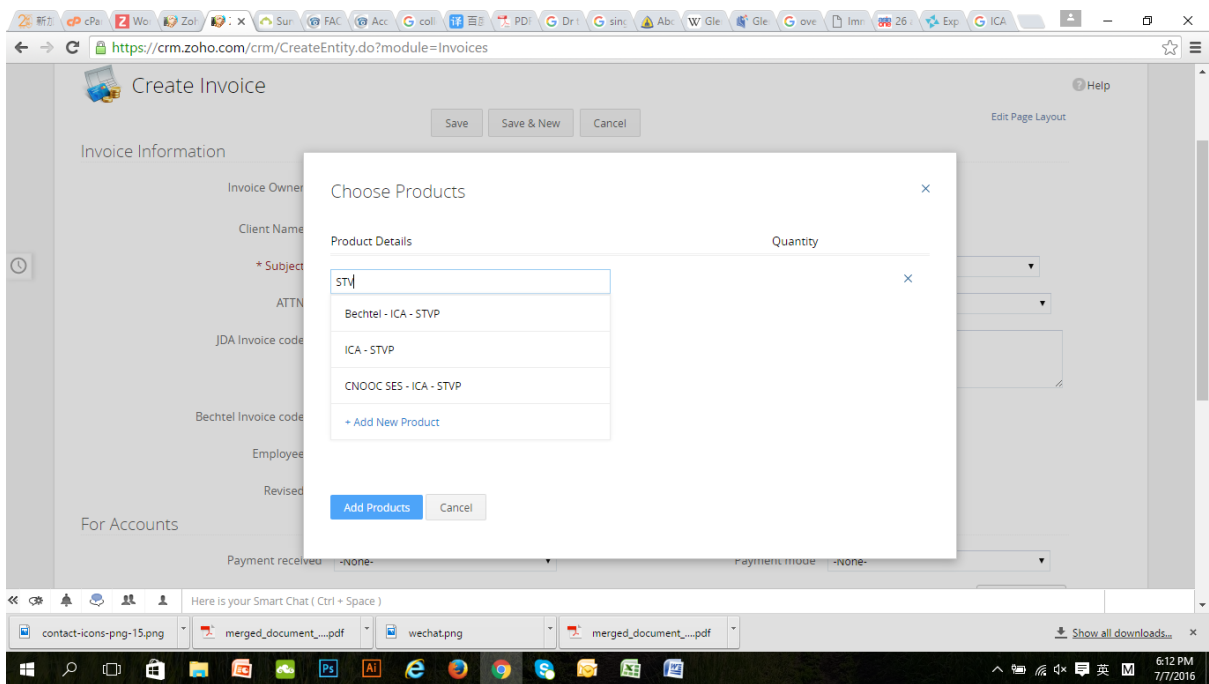
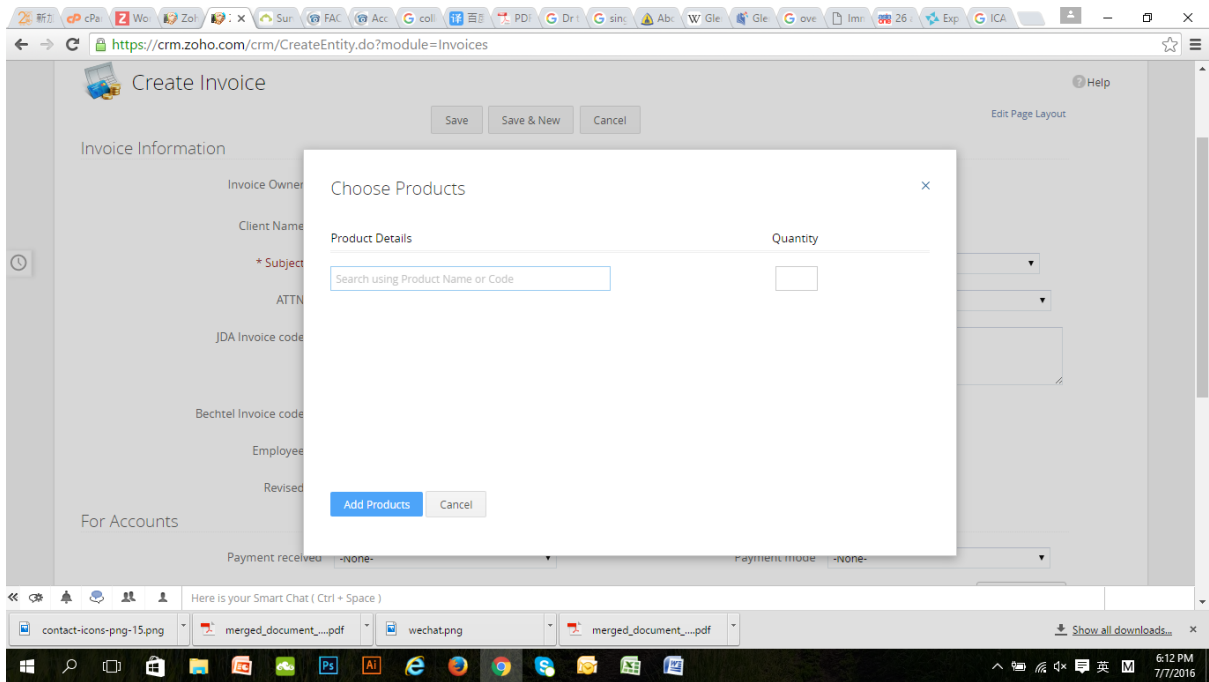
For Accounts

Here is your Smart Chat (Ctrl + Space)

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Show all downloads...

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https://crm.zoho.com/crm/CreateEntity.do?module=Invoices

Billing City

Billing State

Billing Code

Billing Country

Description

Product Details	List Price (\$)	Quantity	Amount (\$)	Discount (\$)	Tax (\$)	Total (\$)
Bechtel - ICA - STVP	150.00	1	150.00	0	0.00	150.00

Add Line Items

Sub Total \$ 150.00

Discount \$ 0.00

Tax \$ 0.00

Adjustment 0

Grand Total \$ 150.00

Save Save & New Cancel

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https://crm.zoho.com/crm/EntityInfo.do?module=Invoices&id=1476737000001754081

Subscription Setup Help

Home Clients Reports Services Invoices Activities Dashboards Projects

Edit Delete Clone More Actions

Print Preview Export to PDF Send Mail

Hotel for JDA

Invoice Date : 07/07/2016

Grand Total : 1412.4

Client Name : PT JDA - Indonesia

Created On : 16:20

Follow

Quick Actions

Add a new task

Related To

Client

PT JDA - Indonesia

Links Add

What's Links?

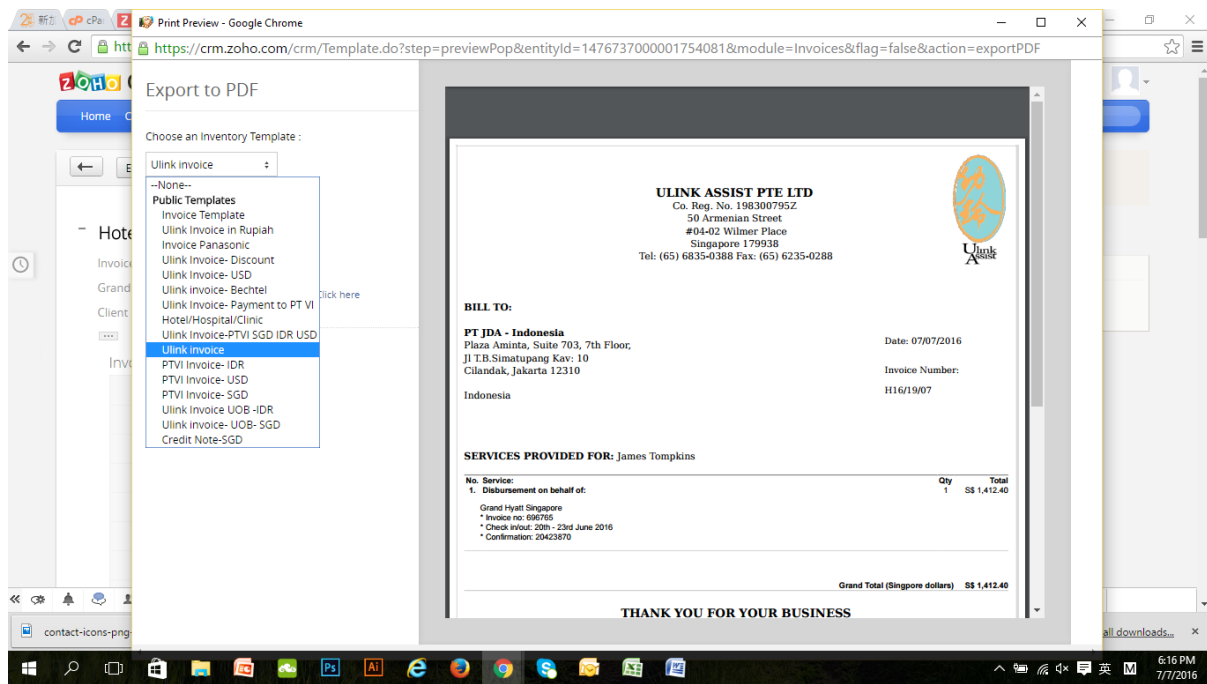
Invoice Information

Invoice Owner	Medical 1 Change	Invoice Date	07/07/2016
Client	PT JDA - Indonesia	Date of service	14/06/2016
Subject	Hotel for JDA	Currency	SGD
ATTN		Invoice type	H
JDA Invoice code		Invoice number	16/19/07
Bechtel Invoice code		Remarks	
Employee	James Tompkins		

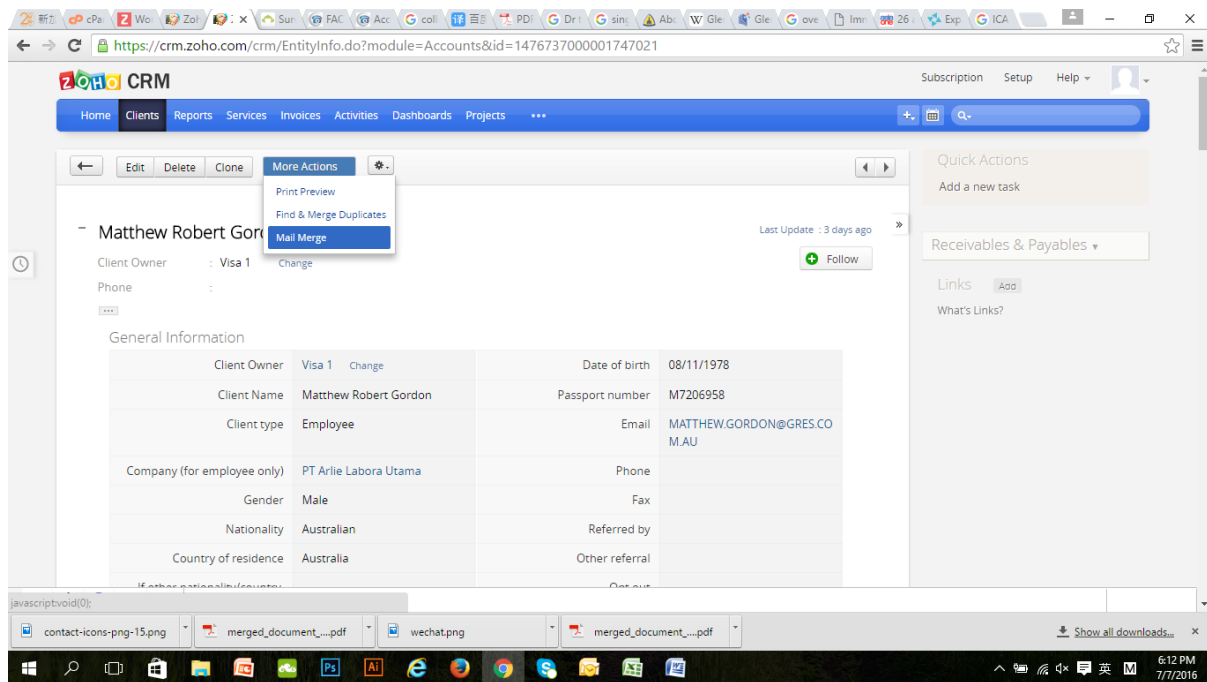
javascriptvoid(0);

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MAIL MERGE



Matthew Robert Gordon

Client Owner : Visa 1 Change

Phone : [REDACTED]

General Information

Client Owner	Visa 1
Client Name	Matthew R
Client type	Employee
Company (for employee only)	PT Arie La
Gender	Male
Nationality	Australian
Country of residence	Australia
If other nationality/country, please specify	

Billing Address

Billing Street

Quick Actions

Add a new task

Receivables & Payables

Links Add

What's Links?

Mail Merge

Select a template : US Emb_Consultation Summary v1.docx

Open with : ☒ Zoho Writer ☐ Microsoft Word (Supported only in IE 6 and above)

Merge Go Back

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Ulink LOG Template inpatient.docx

Last modified at 6:13 PM

File Home Format Insert View Review Tools

Normal Arial 8 B I U ab A [REDACTED]

FOR ENQUIRIES: PLEASE CALL OUR CALL CENTRE: +65 6835 0388

1 January 2016 (Date LOG issued)

The Business Office

Accounts Hospital admitted

Address of hospital (Hospital Address)

Dear Sirs/Mdm

PATIENT:	Accounts_Accounts_Name
DOB:	Accounts_Date_of_birth
ADMISSION:	Accounts_Date_of_admission
ATTENDING DOCTOR:	Accounts_Doctor
DIAGNOSIS/PROCEDURE:	XXXXX (Diagnosis that this LOG covers, it can be more than 1 diagnosis)

Ulink Assist Pte Ltd hereby undertakes to pay the medical and hospitalization expenses incurred by the above-named patient during the subject admission as per following terms:

- Coverage is for *Lowest Standard Single, Double, 4-bedded, 6-bedded (delete accordingly) Room
- Amount covered is up to SGD XXXX (Amount of the LOG you want to cover) only
- *Patient will have to pay the policy excess of SGD XXXX. Kindly collect from the patient. (Please

Page 1/1 Words 338 Chars 2278

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Ulink LOG Template inpatient.docx

Changes are saved only in current Document. Use 'Tools -> Mail Merge -> Update Template' to update Template. Last modified at 6:13 PM

File Home Format Insert View Review Tools Table

Normal Times New Roman

Spell Check Thesaurus Word Count Convert Text to Table Mail Merge

OUR CALL CENTRE: +65 6835 0388

1 January 20

The Business

Accounts Hospital admitted

Address of hospital (Hospital Address)

Dear Sirs/Mdms

PATIENT:	Accounts_Accounts_Name
DOB:	Accounts_Date_of_birth
ADMISSION:	Accounts_Date_of_admission
ATTENDING DOCTOR:	Accounts_Doctor
DIAGNOSIS/PROCEDURE:	XXXXX (Diagnosis that this LOG covers, it can be more than 1 diagnosis)

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Page 1/2 Words 338 Chars 2278 English(US)

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