**TECHNICAL DOCUMENT FOR CRM APPLICATION**

**Modification History**

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| --- | --- | --- |
| **Date** | **Who** | **Comments** |
|  |  |  |

# INTRODUCTION

Welcome to Zoho CRM 5.0, web-based Customer Relationship Management software for managing your customer relations in a better way. You can use the the Zoho CRM software for your organization-wide sales, marketing, customer support, and inventory, functions. It is available in both On-demand (Hosted service) and packaged solution, so that you can select a deployment option as per your IT infrastructure.

Target Audience for the User Manual

* Sales, Marketing, Customer Support, and Inventory teams
* Business Managers and Executives
* System Administrators customizing the Zoho CRM system
* System Integrators

The Zoho CRM software comprises of the following core business functions:

|  |  |
| --- | --- |
| **Sales Team** | **Marketing Team** |
| * Leads * Accounts * Contacts * Potentials * Sales Forecasts * Quotes * Sales Orders * Invoices | * Campaigns * Lead Generation * Mass Mailing Lists |
| **Customer Support & Service** | **Inventory Management/Asset Team** |
| * Cases * Solutions | * Products * Price Books * Vendors * Purchase Orders |
| **Analytics** | **Add - Ons** |
| * Reports * Dashboards | * Outlook Plugin * Web-to-Lead forms * Web-to-Case forms |

# ICONS USED IN CRM APPLICATION



# 1. USER INTERFACE

## 1.1 LOGIN

|  |  |
| --- | --- |
| ID/Number | Requirement Text |
| 1.1.1 | The System shall allow the user to enter data in user name field   * Text Box * 5-25 characters * Alphanumeric |
| 1.1.2 | The System shall allow the user to enter data in Password field   * minimum 8 characters * alphanumeric * special characters |
| 1.1.3 | The System shall allow the user to click on sign in   * Enabled |

## 1.2 LOGOUT

|  |  |
| --- | --- |
| ID/Number | Requirement Text |
| 1.2.1 | The System shall allow the user to logout upon selecting Logout button |

## 1.3 CHANGE PASSWORD

|  |  |
| --- | --- |
| ID/Number | Requirement Text |
| 1.3.1 | The System shall allow the user to enter the old password |
| 1.3.2 | The System shall allow the user to enter the new password   * minimum 8 characters * alphanumeric * special characters * should not be same as old one |
| 1.3.3 | The System shall allow the user to Re-enter the password |
| 1.3.4 | The System shall allow the user to select save button   * Enabled |
| 1.3.5 | The System shall allow the user to select cancel button   * Enabled |

# 2. HOME PAGE

## 2.1 New Lead

|  |  |
| --- | --- |
| ID/Number | Requirement Text |
| 2.1.1 | The System shall allow the user to select the **salutation** from the list   * pick list   Mr.  Mrs. |
| 2.1.2 | The System shall allow the user to Specify the **first name** of the lead   * Text Box * Alphanumeric(1-40) |
| 2.1.3 | The System shall allow the user to Specify the **last name** of the lead   * Mandatory * Text Box * Alphanumeric(1-80) |
| 2.1.4 | The System shall allow the user to Specify the **name of the company** where lead is working.   * Mandatory * Text Box * Alphanumeric(1-100) |
| 2.1.5 | The System shall allow the user to Specify the **designation** of the lead   * Text Box * Alphanumeric(1-50) |
| 2.1.6 | The System shall allow the user to Select the **lead Source** from where the lead is generated   * Pick list |
| 2.1.7 | The System shall allow the user to Select the **Industry** to which the lead belongs   * Pick list |
| 2.1.8 | The System shall allow the user to Specify the **Annual revenue** of the company where lead is working   * Text Box * Decimal Value(1-19) |
| 2.1.9 | Display the **lead owner**(Zoho CRM user ID)to whom the lead is assigned   * pick list |
| 2.1.10 | The System shall allow the user to Specify the **phone number** of the lead   * Text Box * Alphanumeric(1-50) |
| 2.1.11 | The System shall allow the user to Specify the **Mobile number** of the lead   * Text Box   Alphanumeric(1-50) |
| 2.1.12 | The System shall allow the user to Specify the **fax number** of the lead   * Text Box   Alphanumeric(1-50) |
| 2.1.13 | The System shall allow the user to Specify the **email ID** of the lead   * email(1-100) |
| 2.1.14 | The System shall allow the user to Specify the **website** of the lead   * URL(30) |
| 2.1.15 | The System shall allow the user to Specify **number of employees** in the lead's company   * text box * interger value(50) |
| 2.1.16 | The System shall allow the user to Specify **Lead status** from the drop down list   * Pick list |

**NOTE**: Field names are mentioned in **BOLD** letters

## 2.2 New Account

|  |  |
| --- | --- |
| ID/Number | Requirement Text |
| 2.2.1 | **Account name**- The System shall allow the user to specify the company name   * mandatory * Text box * Alphanumeric(100) |
| 2.2.2 | System shall allow the user to specify the URL of the company **website**   * URL * Alphanumeric(30) |
| 2.2.3 | System shall allow the user to specify the **ticker** **symbol** of the company   * Text box * Alphanumeric(30) |
| 2.2.4 | System shall allow the user to specify the **number of employees** in account's company   * Text box * Integers(10) |
| 2.2.5 | System shall allow the user to specify the type of **ownership of the company**   * Text Box * Alphanumeric(50) |
| 2.2.6 | The System shall allow the user to select the **type of industry**   * Pick List |
| 2.2.7 | The System shall allow the user to select the **type of Account**   * Pick List |
| 2.2.8 | The system shall allow the user to select the zoho CRM user to whom account needs to be assigned.  -Bydefault assigns to who creates it   * Pick list |
| 2.2.9 | The System shall allow the user to specify the **phone number** of the account   * Text Box * Alphanumeric(30) |
| 2.2.10 | The System shall allow the user to specify the **fax number** of the account   * Text Box   Alphanumeric(30) |
| 2.2.11 | The system shall allow the user to select the **rating of the account**   * Pick List |
| 2.2.12 | The System shall allow the user to specify the **billing address** of the account   * **Street**-Alphanumeric(250) * **City**- Alphanumeric(30) * **State**- Alphanumeric(30) * **Postal Code**- Alphanumeric(30) * **Country**- Alphanumeric(30) |
| 2.2.13 | The System shall allow the user to specify the **Shipping address** of the account   * **Street**-Alphanumeric(250) * **City**- Alphanumeric(30) * **State**- Alphanumeric(30) * **Postal Code**- Alphanumeric(30) * **Country**- Alphanumeric(30) |

**NOTE**: Field names are mentioned in **BOLD** letters

## 2.3 New Contact

|  |  |
| --- | --- |
| **ID/Number** | **Requirement text** |
| 2.3.1 | The System shall allow the user to select the **Salutation** of the contact, such as Mr., Ms, Mrs., or others.   * Pick List |
| 2.3.2 | **First Name**-The System shall allow the user to specify the first name of the contact   * Text Box * Alphanumeric(40) |
| 2.3.3 | **Last Name**-The System shall allow the user to specify the last name of the contact   * Text Box * Alphanumeric(40) |
| 2.3.4 | **Account Name**-The system shall allow the user to select the account related to the contact.   * Lookup |
| 2.3.5 | **Lead Source-**The System shall allow the user to select the source from the list.   * Pick List |
| 2.3.6 | **Title**-The System shall allow the user to specify the job position of the contact.   * Text box * Alphanumeric (50) |
| 2.3.7 | **Department**-The System shall allow the user to specify the department of the contact.   * Text box * Alphanumeric (30) |
| 2.3.8 | **Date of Birth**-The System shall allow the user to specify the birthday of the contact.   * Date |
| 2.3.9 | **Reports To**-The System shall allow the user to select the person to whom the contact reports   * PickList |
| 2.3.10 | **Phone**-The system shall allow the user to specify the office phone number of the contact.   * Text box, * Alphanumeric (50) |
| 2.3.11 | **Mobile-** The System shall allow the user to specify the mobile number of the contact.   * Text box, * Alphanumeric (50) |
| 2.3.12 | **Assistant**-The system shall allow the user to specify the name of the contact’s assistant.   * Text Box * Alphanumeric(50) |
| 2.3.13 | **Assistant Phone**-The System shall allow the user to specify the phone number of the contact's assistant.   * Text box, * Alphanumeric (100) |
| 2.3.14 | **Mailing Address**- The System shall allow the user to specify the primary address of the contact.   * **Street**-Alphanumeric(250) * **City**- Alphanumeric(30) * **State**- Alphanumeric(30) * **Postal Code**- Alphanumeric(30) * **Country**- Alphanumeric(30) |
| 2.3.15 | **Other Address-**The System shall allow the user to Specify the other address of the contact (if any).   * **Street**-Alphanumeric(250) * **City**- Alphanumeric(30) * **State**- Alphanumeric(30) * **Postal Code**- Alphanumeric(30) * **Country**- Alphanumeric(30) |

**NOTE**: Field names are mentioned in **BOLD** letters

## 2.4 New Potential

|  |  |
| --- | --- |
| **ID/Number** | **Requirement Text** |
| 2.4.1 | **Potential Name**-The System shall allow to specify name of the potential. This field is mandatory.   * Text box, * Alphanumeric (120) |
| 2.4.2 | **Account Name**-The System shall allow the user to select name of the account to which potential has to be created. This field is mandatory.   * Lookup |
| 2.4.3 | **Type**-The System shall allow the user to select the type of potential (New Business or Existing Business) from the drop-down list.   * Pick list |
| 2.4.5 | **Lead Source**-The System shall allow the user to select the lead source from the drop-down list   * Pick list |
| 2.4.6 | **Product Name**-The System shall allow the user to select the product name from the pick list.   * Text box, * Alphanumeric (50) |
| 2.4.7 | **Amount**-The System shall allow the user to specify the amount that can be expected after closing the potential.   * Text box, * Decimal (10) |
| 2.4.8 | **Expected Close Date**-The System shall allow the user to specify or select the expected close date. This field is mandatory.   * Date format (yyyy/mm/dd) |
| 2.4.9 | **Next Step**-The System shall allow the user to specify the next step of the sales process.   * Text box, * Alphanumeric (100) |
| 2.4.10 | **Sales Stage\*-**The System shall allow the user to select the sales stage from the drop-down list. This filed is mandatory.   * Pick list |
| 2.4.11 | **Probability**-The System shall allow the user to specify the probability of closing an potential.   * Text box, * Decimal (2, 2) |
| 2.4.12 | **Assigned To**-The System shall allow the user to select the user to whom the potential has to be assigned.   * Pick list |
| 2.4.13 | **Description**-The System shall allow the user to specify any other details about potential.   * Text area (long text) |

**NOTE**: Field names are mentioned in **BOLD** letters

## 2.5 New Forecast

|  |  |
| --- | --- |
| **ID/Number** | **Requirement Text** |
| 2.5.1 | **Year\*** -The System shall allow the user to select the fiscal year from the drop-down list.   * Pick list |
| 2.5.2 | **Quarter\*-**The System shall allow the user to select the quarter of the fiscal year.   * Pick list |
| 2.5.3 | **Month**-The system display the month of the selected quarter.   * Month |
| 2.5.4 | **Quota**-The system shall allow the user to specify the quota for the month.   * Currency |
| 2.5.5 | **Closed**-The System shall display the amount from the closed won potentials.   * Currency |
| 2.5.6 | **Commit Amount**-The system shall allow the user to specify the total amount a sales person confident of closing during forecast period.   * Currency |
| 2.5.7 | **Best Case Amount**-The System shall allow the user to specify the amount a sales person might be closing. This amount can be either more or less than Commit Amount.   * Currency |
| 2.5.8 | **Pipeline**-The System shall display the amount in the sales pipeline.   * Currency |
| 2.5.9 | **Owned By**-The System shall display the owner of the forecast.   * Lookup |
| 2.5.10 | **Created By-**The System shall display the person created the forecast first time.   * Date/Time |
| 2.5.11 | **Last Modified By**-The System shall display the person modified the forecast.   * Date/Time |

**NOTE**: By default, the person who creates the forecast owns the forecast. If you want to assign the forecast to a different user, select the user name from the Change Owner field in the forecast details view.

Field names are mentioned in **BOLD** letters

## 2.6 New campaigns

|  |  |
| --- | --- |
| **ID/Number** | **Requirement Text** |
| 2.6.1 | **Campaign Owner**-The System shall allow the user to specify the owner name of the campaign.   * Lookup |
| 2.6.2 | **Campaign Name\*-**The System shall allow the user to specify the name of the campaign.   * Text box, * alphanumeric (1-40) * Mandatory Field |
| 2.6.3 | **Type**-The System shall allow the user to select the type of the campaign.   * Check box |
| 2.6.4 | **Status**-The System shall allow the user to select the status of the campaign.   * Pick List |
| 2.6.5 | **Start Date**-The System shall allow the user to specify the date on which the campaign starts.   * Date mm/dd/yyyy |
| 2.6.7 | **End Date**-The System shall allow the user to specify the date on which the campaign ends.   * Date |
| 2.6.8 | **Expected Revenue**-The System shall allow the user to specify the revenue expected after launching the campaign.   * Currency |
| 2.6.9 | **Actual Cost**-The System shall allow the user to specify the actual amount spent on the campaign.   * Currency |
| 2.6.10 | **Budgeted Cost**-The System shall allow the user to specify the planned amount to be spent on the campaign.   * Currency |
| 2.6.11 | **Expected Response**-The System shall allow the user to specify the campaign turnout percentage.   * Percent |
| 2.6.12 | **Number sent**-The System shall allow the user to specify the number of campaign details has been sent.   * Integer |
| 2.6.13 | **Description**-The System shall allow the user to specify additional details about the campaign.   * Text area (32KB) |

## 2.7 New cases

|  |  |
| --- | --- |
| **ID/Number** | **Requirement Text** |
| 2.7.1 | **Case Number-** The System shall display the case ID after creating a case.   * Number |
| 2.7.2 | **Case Owner**-The System shall allow the user to select the name of the CRM user to whom the Case is assigned.   * Lookup |
| 2.7.3 | **Subject\*-**The system shall allow the user to specify the title of the Case. This field is mandatory.   * Text box, * Alphanumeric (255) |
| 2.7.4 | **Priority**-The System shall allow the user to select the priority of the Case from the drop-down list.   * Pick list |
| 2.7.5 | **Status**-The System shall allow the user to select the status of the Case from the drop-down list.   * Pick list |
| 2.7.6 | **Category**-The System shall allow the user to select the category of the Case from the drop-down list.   * Pick list |
| 2.7.7 | **Reported By**-The System shall displays the name of the contact. |
| 2.7.8 | Related To-The System shall allow the user to select the name of the contact who submitted the Case.   * Lookup |

## 2.8 New Solutions

|  |  |
| --- | --- |
| **ID/Number** | **Requirement Text** |
| 2.8.1 | **Solution Title\*-** The System shall allow the user to Specify the subject of the solution.   * Text box, * Alphanumeric (255) |
| 2.8.2 | **Solution Owner**- The System shall allow the user to select the Zoho CRM user's name to which the solution is assigned.   * Pick list |
| 2.8.3 | **Product Name**-The System shall allow the user to select the name of the product to which the solution has to be associated.   * Lookup |
| 2.8.4 | **Category**-The system shall allow the user to select the category of the solution.   * Text box, * Alphanumeric (255) |
| 2.8.5 | **Question\*-**The System shall allow the user to select the priority of the solution from the drop-down list.   * Text box, * Alphanumeric (255) |
| 2.8.6 | **Answer\*-**The system shall allow the user to specify solution details.   * Text Area |
| 2.8.7 | **Status** -The system shall allow the user to specify the status of the solution.   * Pick list |
| 2.8.8 | **Description**-The System shall allow the user to specify any other details about solution.   * Text Area (32 KB) |
| 2.8.9 | **Comments**-The system shall allow the user to specify additional comments about the solution.   * Text Area (32 KB) |

## 2.9 New Products

|  |  |
| --- | --- |
| **ID/Number** | **Requirement Text** |
| 2.9.1 | **Product Name\*-** The System shall allow the user to Specify the name of the product. This field is mandatory.   * Text box, * alphanumeric (50) |
| 2.9.2 | **Product Code**- The System shall allow the user to Specify the product identification.   * Text box, * alphanumeric (40) |
| 2.9.3 | **Product Active**-The System shall allow the user to specify the status of the product.   * Check box |
| 2.9.4 | **Commission Rate**-The System shall allow the user to specify the commission rate for selling the product.   * Text box, * decimal () |
| 2.9.5 | **Qty/Unit**-The System shall allow the user to specify the quantity rate for selling the product.   * Decimal |
| 2.9.6 | **Unit Price**-The system shall allow the user to specify the unit price of the product.   * Decimal |
| 2.9.7 | **Manufacturer**- The system shall allow the user to select the name of the product manufacturer.   * Pick list |
| 2.9.8 | **Product Category**- The system shall allow the user to select the category of the product.   * Pick list |
| 2.9.9 | **Purchase Date**-The system shall allow the user to select the date of purchase from the calendar.   * Date |
| 2.9.10 | **Support Start Date**-The System shall allow the user to select the date on which the product support starts.   * Date |
| 2.9.11 | **Support Expiry** **Date**-The System shall allow the user to select the date on which the product support ends.   * Date |
| 2.9.12 | **Description**-The System shall allow the user to specify any other details about product.   * Text area (long text) |

## 2.10 Price Books

|  |  |
| --- | --- |
| **ID/Number** | **Requirement Text** |
| 2.10.1 | **Price book Owner**- The System shall allow the user to select the Price Book owner from the available users list.   * Lookup |
| 2.10.2 | **Price book Name**\*- The System shall allow the user to specify the name of the Price Book. This field is mandatory.   * Text box, * alphanumeric (50) |
| 2.10.3 | **Active**- The System shall allow the user to select the Active check box to set the status of the Price Book as active.   * Check box |
| 2.10.4 | **Description**-The System shall allow the user to specify any other details about Price Book.   * Text area (long text) |