



GUIDE TO ZOHO CRM TERMS

Handbook



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1: GENERAL SETTINGS

As an administrator your first step towards implementing Zoho CRM for your organization is to define your personal and organizational settings by picking the language and time zone, configuring email settings, adding your email signature details, and configuring Gamescope to keep your team members motivated by giving timely rewards and perks.



1.1 Personal Settings

Personal Settings is a data fulfillment area that stores your information such as name, email, role, profile, and address. You can also update information on your language preference as well as date and time format preference. You may upload your signature here which can then be auto populated in the emails that you send from Zoho CRM.

1.2 Company Details

There are certain organization-specific details which help differentiate one organization from another. Zoho CRM recommends users with the Administrator privileges customize these company-specific details so that all users in the organization account will share the basic settings.

Fiscal Year:

The fiscal year setting helps organizations configure their financial year, typically based on the start month. Once the fiscal start month is selected, fiscal quarters are automatically rolled up. By default, Zoho CRM's fiscal start month is set to January. You can specify the fiscal year name based on the start or the end of the month. For example, let's say your fiscal year starts in April 2020 and ends in March 2021.

1: GENERAL SETTINGS

- ▶ If you choose the fiscal year to be based on the start month, the year name will be displayed as 2020 (wherever applicable).
- ▶ If you choose the fiscal year to be based on the end month, the year name will be displayed as 2021.

Fiscal Year setting comes in handy when you configure the forecasts.

Business Hours:

Teams in your organization may work different business hours and work in shifts based in different time zones. Define your business hours to ascertain availability of teams or individuals to take up tasks – whether it's escalations or activities.

Email Settings:

Configure your email account in Zoho CRM via IMAP to work with sales and email from one place.

Holidays:

You can create one master holiday list for the entire organization or separate holiday lists for each shift. For example, you can create a separate list of holidays for the US which will only apply to the US shift employees. You can create a holiday list for every shift.

Currencies:

Setting currency is an organization specific feature. By default, the currency is set to US dollars (\$). However, user(s) with Administrator privilege can change the currency settings depending on the organization's requirement. Based on the country locale you choose, the currency value will be updated

for Quotes, Invoices, Campaigns and other billing related fields. Zoho CRM also provides you with multi-currency support that helps you to handle business transactions in the global marketplace easily. If you regularly deal with international clients and vendors, then Multi-Currency will facilitate international buying and selling. After adding the home currency, the administrator can add other currencies that company uses for business. Other users will then be able to select these currencies to use them as a record's currency while creating leads, contacts, deals, etc.

1.3 Gamescope

Gamescope in Zoho CRM is designed to make sales more fun and exciting for your sales teams. This is achieved in two ways: by letting sales people compete with each another and also with themselves.



Compete with each another:

Games based on sales activities are conducted among individuals or groups in order to promote healthy competition. On completing a specified set of activities, participants of a game win trophies, each of which carries a certain number of points. The player or group with the most points at the end of the game wins.

Compete with yourself:

In order to encourage individuals to push themselves to perform better, a sales manager sets specific targets or goals for their sales reps to meet. Every time this goal is met, a user wins a badge. A user does not need to be a part of a game to win a badge.

2: USERS AND CONTROL

2.1 Users

Anyone whose email address is mapped to a user license for your account is a CRM user. A Zoho CRM user is someone who manages records, either their own or those shared by other users, within the organization. In short, any employee who accesses the CRM account to manage the data is a user.

In addition to accessing the CRM data, some users perform administrative functions to ensure the smooth running of the CRM account. As a CRM administrator, you can add users to the organization's Zoho CRM account, enabling your employees to conduct their day-to-day tasks independently.

The number of users you can add to your CRM depends on the licenses you have purchased. You need to buy a license for every user who accesses CRM. The users sign in to their accounts with their email address and password.

Every user is given a role and profile. The profile determines what features a user can access and the role determines what data they can access based on the organization's hierarchy.

2.2 Security Control (Profile Permissions)

Use the Manage Profile Permissions option to permit or restrict access to specific features. For example, if people on different teams are working together on a particular project or deal, so you might choose to enable data sharing rules for uninterrupted access to a record across teams and departments. There are three main categories of permission:

Module Permissions let you define which module the users with a particular profile will have access to. You also specify the actions they can perform such as viewing, editing, deleting, or sharing a record from a module.

Setup Permissions let you decide whether the users with a profile can manage primary CRM functions such as customizing templates, managing automation, webforms, data administration and so on.

Extension Permissions let you define permissions for extensions, CRM APIs, and social settings. These permissions govern communication with third-party integrations.



2.3 Compliance Settings

GDPR: Zoho CRM is equipped to comply with GDPR as a data processor. There are options in Zoho CRM designed to help you safeguard your customers' data and meet the security and privacy standards of GDPR.



Data security and privacy are two different terms that are often used interchangeably, however, they have specific meanings:

- ▶ **Data Privacy** concerns the lawful collection and usage of personal data.
- ▶ **Data Security** is having the physical, technical, and administrative safeguards in place to protect your customer's data.

As a result, we've introduced options in Zoho CRM that will:

- ▶ Help you abide by the privacy rules
- ▶ Provide you a secure platform to protect your customers' data

2.4 Performance Management



Increase your sales team's productivity with accurate forecasts of potential revenue and use productivity games to exceed your sales quotas. You can categorize customers quickly, set up multiple currencies, use AI predictions to prioritize leads and deals likely to convert, and track website visitors to convert more prospects.

2.4.1 Forecasting

Forecast your revenue and assign targets for your team using key information like deals in the pipeline, quotas achieved during the last fiscal year, and individuals or teams that are working towards their goals. Identify the bottlenecks using real-time data and boost your team's performance.

[Learn how to set up forecasting.](#)

2.4.2 Territory Management

Whether your company organizes sales teams around geography or product lines, territory management can handle your customer segmentation. Share accounts between territories, identify regions that make a profit, allocate resources, and exceed sales forecasts, all while offering excellent customer service. [Learn more about territory management.](#)

2.4.3 Gamification

Turn routine tasks into contests and watch your sales representatives compete to add the most notes or send the most emails. Change the way your sales team works by breaking the routine with Gamescope, the gamification feature in Zoho CRM. It's more than just leader boards or rewards; it's a way to liven up your workplace. [Learn more about gamification.](#)

2.4.4 AI Predictions

Focus your efforts using empirical data from Zia, your very own AI-powered sales assistant. She studies every interaction between you and your prospects, analyzing the response time and the stage of the sales cycle they're in to assign a probability score for each lead and deal. This provides you with a priority-based order of leads to contact and deals to work on that are most likely to bring in revenue. [Learn more about Zia predictions.](#)↗

2.4.5 Analytics

From lead analytics to deal insights, activity stats, and email analytics, Zoho CRM's advanced analytics help you monitor every aspect of your sales cycle. Create customized dashboards with analytical widgets for sales, such as charts, target meters, KPIs, and funnels. Make data-driven decisions with customizable reports and boost your sales with actionable data intelligence.

2.5 Team Collaboration

Zoho CRM is a collaborative CRM built to facilitate communication with your customers as well as your own team. Help your team stay connected with real-time sales updates. Enable teams to add helpful context to their sales records, or connect your collaboration tools to share updates from one platform.



Feeds

Keep your team updated with feeds, where you can discuss deals, collaborate on ideas, and broadcast announcements. Talk about a sales pitch that worked for you, post updates on the big deals that everyone is working on, and share helpful sales collateral. Use Feeds to stay updated on all key actions taken on records you own and follow. All of this is possible in Feed: a centralized area for all of your internal CRM discussions.

Chat

Zoho gives you the power to integrate your live chat tools with your CRM. Create helpful commands and bots within your chat tools to pull up CRM records, reports, and analytics so you can easily share them with your teammates. Send CRM lead approvals and reminders for events or calls via your chat tool and set up SalesSignals in CRM for new chat notifications. You can even automate sales updates to be sent in real time via chat so that your sales team stays in sync with the rest of the teams in your organization.

Notes

Leave helpful notes on your sales records and activities. Not only will this help your sales reps recall the chain of events leading up to the sale, it also leaves a paper trail for anyone else who is involved in the deal. Zoho CRM lets you record text and audio notes for every module and upload attachments to add as much context as you need.

Tags

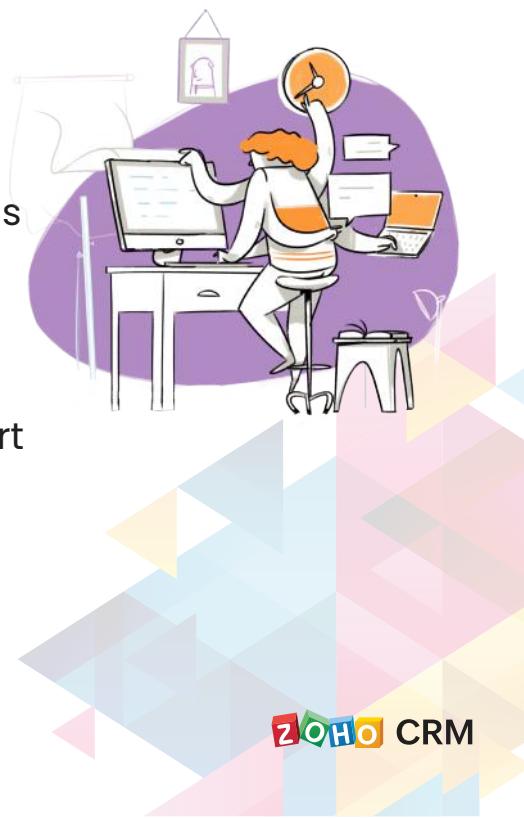
The ability to add tags makes it easy to organize and collaborate on your records. Use tags to mark different categories of records with specific labels that you can use to easily identify, search, sort, filter, and segment records. For example, tagging records with the name of an event where you met them, so that you can easily pull up every record associated with that specific event in the future.

Groups

Zoho CRM allows you to sort different users into specialized groups to manage shared records. Groups can be created around a common purpose like team selling, team support, or event management. You can create different types of user groups and even share records among multiple groups.

Project Management

When your sales team gets involved in several projects at once, productivity can take a hit unless they're planned and managed efficiently. Integrate your project management system with your CRM and assign your projects and any associated records to individual members of your sales team. Keeping your projects synced with your sales process in one comprehensive system allows you to manage your tasks more efficiently, saving valuable time and effort for your whole team.



3: CHANNELS

3.1 Email

The sales context to customer interactions helps you prioritize and be efficient in your communication with them. That's why Zoho CRM comes with a wide range of options in its email suite.

- ▶ Send and receive emails from CRM
- ▶ Track emails to receive useful reports and insights
- ▶ Prioritize email conversations based on who sent them:
Customers, Leads/Contacts, Colleagues, and Unknown People
- ▶ Automatically link your to customer records in CRM, allowing you to see all details of a customer in the same place as their emails

You can set up an email account via IMAP or POP configuration.

▶ [IMAP \(Internet Message Access Protocol\)](#)  is useful when you want to replicate your entire email inbox in Zoho CRM. IMAP configuration is also a preferred protocol for many businesses as it allows synchronization across multiple devices. When you activate IMAP account in CRM, you will be able to use SalesInbox.

▶ [POP \(Post Office Protocol\)](#)  does not allow multiple device synchronization but it is useful if you want to back up your emails.

3.2 Telephony

The telephony feature connects your PBX system with Zoho CRM system that holds all the important details of your leads and customers.

With this feature, Zoho CRM offers you a platform to manage incoming and outgoing calls. Not just that, it reminds you of the calls that are scheduled and also identifies the caller and matches the details with the customer's record in Zoho CRM. With telephony, you get the sales context to your conversations with customers. When you receive an incoming call, you not only know who's calling, but you also gain visibility into the caller's key CRM details and their relevance to your business. This enables you to have a meaningful conversations with your customers. It's an effective system in which your telephone solution is combined with CRM.



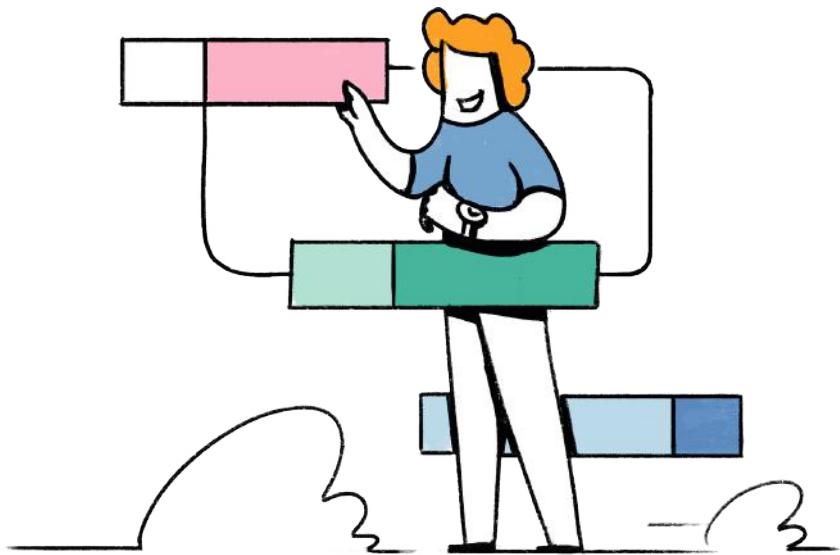
[Learn more about telephony in Zoho CRM.](#)

3.3 Social

Integrating your CRM account with social media helps with real-time communication with customers. You can integrate your Twitter and Facebook accounts with Zoho CRM. Not only does this integration help you monitor and participate in social media activities from one place, it also provides clarity about the significance of a particular customer to your business.

[Learn more about working with the Social tab.](#)

3.4 Visitor Tracking



Having an easy way to gather the details about your website visitors and instant access to your comprehensive CRM database can be a great advantage for your business. With visitor tracking integration, you can associate and track more than one portal with Zoho CRM. You can also export visits data, export visits reports, and perform data migration and data backup for your visits. You can also use the Zoho SalesIQ chat option to engage the visitors on your website.

If you are already using Zoho SalesIQ, you probably have the code embedded in your website to track visitors. In that case, you just need to enable the Visitor Tracking feature to associate the details with the customer's data in Zoho CRM. If you are not using Zoho SalesIQ, then you will need to enable it and specify some details for the integration.

3.5 Signals

The SalesSignals feature in Zoho CRM provides real-time notifications of conversations from your leads, contacts, and potential customers across multiple communication channels such as telephone, email, social media and live chat. You can keep track of all the customer interactions across various channels and follow up with them from one central place, your Zoho CRM account. SalesSignals improve timely communication and enables you to follow-up with your leads and contacts and close deals quickly.

[Learn more about enabling SalesSignals in Zoho CRM.](#) ↗

3.6 Portals

Portals in CRM are designed for administrators to extend CRM access to their contacts, vendors, or partners. A portal user can access some modules and associated data such as products, invoices, and notes from your CRM. They can also view, edit records, create records, add notes, and add attachments.

[Learn more about creating portals.](#) ↗



4: CUSTOMIZATION

4.1 Modules and Fields



In Zoho CRM, data is categorized into groups, called "modules", based on similarity. For example, Leads is a module that contains all your business leads' details. Contacts, Accounts, Deals, and Quotes are some other examples of modules.

In Zoho CRM, there are two main types of module: default modules and custom (or user-generated) modules.

4.1.1 Leads

Leads are the unqualified contacts or sales opportunities in your business. A lead is a company or an individual who has expressed interest in a company's product and/or service. In a CRM system, a record usually starts as a lead. Lead records contain the raw details gathered about individuals or representatives of organizations collected from websites, references, trade shows, seminars, advertisements, and other marketing campaigns. A lead goes through the follow-up process and, when qualified, they are converted into a contact and an account in Zoho CRM.

[Learn what you can do with the Leads module in Zoho CRM.](#) ↗

4.1.2 Contacts

Contacts are individuals associated with an Account a company has done business with or might do business with in the future. They are the people in an organization who your company communicates with in pursuit of business opportunities. Some of these contacts may belong to different departments in a company and you may have multiple contacts at the same company. CRM contacts are typically converted from qualified leads, imported from an existing list, or added individually.

4.1.3 Accounts

Accounts are companies (or households for B2C) a company has business relations with. Each Account can also be associated with other records in a CRM system, such as Opportunities or Contacts. In a typical B2B scenario (one business selling products or services to another business) accounts play a major role in keeping track of important company information.

Check out these knowledge base articles on [working with the Accounts module.](#)↗

4.1.4 Deals

Deals (or Opportunities) are potential sales deals or revenue-generating events. A deal can be with an existing Account or with a new Account. CRM software can be used to track, manage, and organize all information and activities related to Deals.

Check out these [knowledge base articles on working with the Deals module.](#)↗

4.1.5 Analytics

CRM analytical reporting describes reports run in a CRM system that provide specific insights on customers, such as buying trends, customer demographic snapshots, multi-dimensional analysis, and period-over-period comparisons.



[Learn more about Data Analytics in Zoho CRM.](#)↗

4.1.6 Quotes

Quotes are agreements between customers and vendors to deliver the requested product within the specified time at the agreed price. A quote can be converted into a Sales Order or Invoice with a single click. Templates can also be created based on the quote details and sent to the customer.

Check out this knowledge base article to [learn more about getting started with the Quotes' module in Zoho CRM.](#)↗

4.1.7 Marketplace

A platform where developers list their applications that can integrate with Zoho CRM which you may need for use cases which are not covered by the standard CRM features.

4: CUSTOMIZATION

4.1.8 Sales Orders

A sales order is the confirmation of a sale generated after the customer sends a purchase order based on your quote. In Zoho CRM, a quote can be converted into a sales order with a single click.

[Learn how to create a sales order.](#)↗

4.1.9 Purchase Orders



A purchase order is a document sent to a supplier or vendor, authorizing shipment of a product to the customer at a specified price and terms. The creation of a purchase order creates a legally binding contract which cannot be changed without the consent of both parties.

[Learn how to create a purchase order.](#)↗

4.1.10 Invoices

Invoices are bills issued by a vendor to the customer with the goods or services to illicit payment. In Zoho CRM, a quote can be converted into a sales order or invoice with a single click.

[Learn how to create an invoice.](#)↗

4.1.12 Campaigns

Campaigns are marketing activities (inbound or outbound) whose purpose it is to build interest and awareness around a company's products, services,



and brand. Outbound campaign examples can include email blasts to introduce a new product, print advertisements, cold calling, and company events, while inbound campaign examples include web-to-lead forms to collect the names of people who want to learn more about a product, search

engine optimization (SEO), and social media.

4.1.13 Vendors

Vendors are the companies, individuals, and contractors your organization procures products and services from. The vendor details stored in Zoho CRM help you keep track of the vendors or suppliers for the future procurement of products.

[Learn more about working with the Vendors module in Zoho CRM.](#) ↗

4.1.14 Price Books

Price books contain the agreed prices for selling a product to a customer. The unit price is the price fixed by the manufacturer for the product and the list price is the sellers' price which can be quoted in the price books. Discount ranges can also be defined. In Zoho CRM, you can define multiple price books, and assign a default price to each client. You can cater to a mix of retail and distribution clients, or smaller vs. larger clients, with a convenient price book for each pricing channel or level.

[Learn how to create a price book.](#) ↗

4.1.15 Cases

Cases are feedback received from customers on various issues they have with your products or services. They can be feature requests or bug reports. Once cases are created, they can be assigned to the right support agent in your organization for better case resolution and customer satisfaction.

[Learn more about working with the Cases module in Zoho CRM.](#) 

4.1.16 Solutions

Solutions are the resources within the organization that help solve recurrent problems encountered by customers.

[Learn more about working with the Solutions module.](#) 

4.1.17 Forecasts

Forecasts are the factual insights needed for making smart business decisions and anticipating future sales. In Zoho CRM, your forecasts are automatically generated in the form of charts and textual information to provide you with a personalized view of your business in real time for tracking and fine-tuning the sales process in your organization.

[Learn more about working with forecasts.](#) 



4.1.18 Visits

The Visits module is integrated with Zoho SalesIQ (Zoho's web traffic analysis tool) so you can see your website visitor activity reports in CRM.



[Learn how to integrate SalesIQ with your Zoho CRM.](#) ↗

4.1.19 Social

Social CRM is a strategy that focuses on interaction, engagement, and transaction with customers via social media channels.

[Learn about working with the Social module in Zoho CRM.](#) ↗

4.1.20 SalesInbox

SalesInbox is a mailbox inside your CRM that reflects your sales pipeline and organizes your emails according to sales priorities, so that you stay on top of the deals that matter the most. Connect Zoho CRM with your email client and SalesInbox will create a 4-column layout (Deals, Contacts/Leads, Not in CRM, and Colleagues) and allocate incoming emails to one of the four columns.

[Learn more about SalesInbox and how to work with it.](#) ↗

4.1.21 Activities

An important aspect of CRM is to keep track of sales activities such as tasks, meetings, and calls. You can neatly organize the numerous records along with the activities associated with them such as follow-up, pre-sales and post-sales activities, and phone conversations. They can be useful in initiating and tracking pending action items and recording the results of meetings or events.

In Zoho CRM, the Activities module is where create and associate business tasks, meetings, and calls. Each activity has vital information on the date, time, priority level, and notification settings which can be accessed from the record it is associated with.

[Learn more about working with tasks and meetings.](#) 

4.2 Interlinking Modules



A linking module serves as a connection between two modules associated via a multi-select lookup field. Each association between two modules (created via a multi-select lookup field) is created as a record in the linking module.

[Learn more about working with linking modules.](#) 



4.3 Page Layouts

The page layout is a form that consists of fields and sections to capture information about a record for a particular module, such as a Deal or a Contact. You can modify an existing layout by editing the fields or adding more fields or sections as required. Alternatively, you can create a new layout from scratch and add new fields and sections, then share it with a specific set of user profiles.

4.3.1 Multi-page Layouts

Manage sales for multiple products, geographical areas, or processes, from one CRM system.

Page layouts help your sales representatives view and access personalized data and create workflows to function independently. With fields, links, and buttons, you have everything you need to design your own layouts for each new process.



Zoho CRM allows you to run a separate sales process with fields, records, Views, workflows, reports, and dashboards. This means that different departments in your organization can use and customize CRM without you needing multiple CRM accounts.



4.3.2 Layout Rules (Conditional Layouts)

Conditional layouts are created with layout rules, which allow you to establish an interface which shows or hides certain fields depending on the value entered in a previous field. This makes your layouts dynamic as the entire structure of a layout changes based on the field values you enter.



Note that you are not eliminating fields from the layout, you are only controlling how a layout appears based on certain field values.

[Learn more about working with conditional layouts.](#)

4.3.3 Validation Rules

Validation rules in Zoho CRM allow you to determine the accuracy and validity of the data that enters CRM. You can define unacceptable values for a field in a validation rule, and if a field value entered for a record matches the criteria defined in the rule, CRM will throw an alert and will not allow the record to be saved.

[Learn more about creating validation rules.](#)

4.3.4 Field-level Customization

Standard Fields

Zoho CRM provides some standard, default fields in each module. These fields can be displayed or hidden as per the organization's requirement. The mandatory fields cannot be edited or deleted.

4.3.4.1 Subforms

Subforms are secondary forms or tables, which are part of a primary form in Zoho CRM. With subforms, you can establish a one-to-many relationship with data in your CRM, where many secondary items are associated with a single primary record.

[Learn more about working with subforms.](#)↗

4.3.4.2 Custom Fields

In addition to the standard fields available in each module, Zoho CRM allows you to add more industry-specific custom fields according to your business process. You can add custom fields to all the modules. You can edit, delete, and hide some of Zoho-defined fields, but note that there are some fields that you cannot delete, remove, rename, or change from the mandatory settings. These Zoho-defined fields are mandatory in Zoho CRM. For example, Last Name in Leads, Subject in Tasks. You can hide the fields for users with a specific profile or mark the fields as Read Only.

Types of custom fields:

Currency Field: The currency field in Zoho CRM module layouts enable your users to enter a monetary value. It displays a currency symbol and allows you to enter a decimal value.

[Learn more about working with currency fields.](#) ↗

Pick List Field: A pick list (or dropdown) field is a field type in Zoho CRM that allows you to set a list of options for CRM users to choose from, when submitting data. For example, while creating a new lead, you want users to select an industry from the dropdown list in a field called 'Industry'. As an administrator of the Zoho CRM account, you can edit the default pick list options provided in Zoho CRM.

Multi-Select Pick List Field: The multiple pick-list option enables users to select multiple values when creating or editing record. For instance, some of your customers may be interested in multiple services that you offer. In this case, you can use the multi-select pick list value instead of single pick list value while creating a potential. You can modify the pick list values as per your organization's business process.

Lookup Field: The lookup field helps in establishing a relationship between different modules (linking two different modules: e.g., Accounts with Contacts). For example, some of your contacts refer more leads for your business. You want to know which contact referred a lead. So you have a field called "Referred By" in your Leads module, which lets you browse for and choose the correct contact. This association is established by creating a lookup field. Note that lookup fields cannot be created for Tasks and Events.

[Learn more about creating a lookup field.](#) ↗

Multi-Select Lookup Field: The multi-select lookup field enables you to establish a many-to-many relationship between two modules in CRM.

For example, in an insurance company:

- ▶ A single policy may be held by many policy holders.
- ▶ A single policy holder may hold many policies.

If you have two modules, Insurance Policies and Policy Holders, it is necessary to associate multiple records from each module to records in the other modules. This is not possible with a regular lookup field, as it only allows a one-to-many relationship.

In this case, you can use a multi-select lookup field from the New Fields tray in the Layout Editor. This will let you associate multiple records from two modules to each other, thus establishing a many-to-many relationship in CRM.

Auto-Number Field: The auto-number custom field helps classify records with unique numbers. Once the auto-number field is added to a CRM module, a number is added sequentially to new records. This can also be used to update existing records. For example, Invoice Number, Quote Number, or Sales Order.

User Field: By default, the record owner is the only owner of a record, but you may sometimes want other users also to be involved in a record action with ownership privileges. You can use the User field to add multiple owners to a record. The co-owners of that record will be able to view the record's details and the related lists.

Record Image Field: In Zoho CRM, you can add images to the records in the Leads, Contacts, Accounts, Deals, Products, Cases, Solutions, Vendors, and custom modules. This will enable your customers and CRM users to view the record from the detail page. For example, in the real estate business the property image can be visible to both the buyer and the sales rep. As a Zoho CRM administrator, you can also choose to disable the record image field if required.



File Upload Field: In Zoho CRM, you can use the file upload field to add any file or document that is closely related to a record to the record itself.

For example, your business requires you to transact a service level agreement, financial statement, or property layout with your client. Documents like these are user specific and can be added to the client's record using a file upload field for future reference. You can upload files to a record from any of these sources: your computer, Zoho Docs, or Google Drive.

Image Upload Field: This field can be used to upload images to a record. For example, agents can upload images of properties, automobiles, or products and share the record with peers or customers. This field can also be accessed through portals, so the customers can upload necessary images to the record.

Map Dependency Field: There may be fields in Zoho CRM module layouts whose values depend on another field's value. This can be defined as a parent-child relationship. For example, there are two fields, Country and State, in your Leads module. The values in the State field will depend on the country that you select from the Country field. Similarly, the values for a Sub-department field will depend on the Department field that you select. This kind of relationship is established by mapping dependency fields. You can define which values will appear in the Child field when a certain value is chosen in the Parent field. Note that this only applies to pick-list fields.

4.3.4.3 Formula Fields

The Zoho CRM formula fields enable you to define fields that can be populated with dynamically calculated data based on the values returned from other standard or custom fields. For example, an insurance company may need to determine whether the date of birth provided by a policy holder confirms their eligibility to own a policy based on their present age.

A formula field is made up of three elements: functions, arguments, and operators.

A **Function** expresses the dependence between two quantities: the input and the output. In other words, the function performs a specific operation on values that you specify and generates a new value. To compose a function, you need to type the function name, followed by a set of parentheses, which contain the information to perform the function. The values within the parentheses are called arguments.

For example: Abs(); Ceil(); Timepart()

An **Argument** is a piece of information within a function that commands the values to act or produce. Arguments appear within the parentheses and are separated by commas (argument 1, argument 2, etc.). The types of argument in a function can be text, numbers, field references, or other functions. For example: Abs(-27.05); Max(12,6,10)

4: CUSTOMIZATION

An **Operator** is a special symbol such as "+" or "%" that acts upon the arguments (literals, numbers, fields references) in the formula and returns a new value. For example: Abs(+27.50); (32*25)

The different data types available in Zoho CRM formula fields are:



Numeric Data Type

The numeric data type contains number (digits) in various representations and performs the calculations. The numeric data type can be integral types, or whole numbers, (positive, negative, and zero) and non-integral types with decimal parts.

Examples of numeric data types are:

+5, -9, 10, 0 (integral types) and -25.02, 27.25 (non-integral types).

Currency Data Type

The currency data type is used for data types that hold monetary values or financial calculations. This contains the numeric value of the data along with the appropriate currency symbol.

String Data Type

The string data type contains an ordered sequence of symbols. These symbols can be chosen from a predetermined set of mathematical objects and letters (unicode characters). Example of string data types are: 'demo', 'crm'.

DateTime Data Type

The datetime data type is used to store or display values that contain both a date and time or only a date. An examples is ('May 15, 2004 11:25am').

Boolean Data Type

The Boolean data type, also known as the logical data type, is used to represent the logical values of true and false. Examples of Boolean data types are: true; false.

4.3.4.4 Special Fields

Special fields are not common to all modules but are only available in specific modules, depending on their purpose or function.



The list of special fields in CRM are:

Terms & Conditions field: This field allows you to define the text for terms and conditions while creating invoices, quotes, and orders.

Tax Rates field: The Tax Rate field lets you assign different types of tax rates for the products created in inventory. You can define the tax type and its corresponding value as a percentage, for example: Sales Tax = 10.5 %; VAT = 1%, etc. You can edit the tax value of the products when you choose a product in the inventory line item while creating a quote, an order, or an invoice. While customizing the tax rates, you can select whether the rates can be modified or auto-calculated when invoices are created.

Stage Probability: Defining the criteria for the various stages in your sales process is important to identify the performance of an organization-wide sales pipeline. Stage probability can be determined based on two important factors: forecast type and forecast category. These two values are useful in describing the stage of a deal.

Contact Roles: When prospecting, you need to contact different people (contacts) to finalize the sales deal. Contact Roles help you identify the role of the contact in the prospective organization so you always have the right discussion with the right person. For examples, you want to explain details about the product price to the Financial Manager but product features should be discussed with the Product Manager.

4.4 Wizards

A wizard helps you divide a long form into a series of screens, where users can enter data on each screen and then proceed to the next step until completion. A step-by-step approach is less overwhelming and reduces the chances of erroneous data entry, as the partially completed form can be saved as draft and submitted later.

[Learn more about how wizards can be useful for you and how you can create them.](#) ↗

4.5 Pipelines

A sales pipeline is a company's repository of all combined sales opportunities across every stage of the sales process. The sales pipeline typically ranks opportunities from lowest probability (least likely to close) to highest probability (most likely to close).

4.5.1 Multiple Sales Pipelines

Every business has a unique sales process. If you are selling different products or targeting different types of markets, multiple pipelines can help you capture each deal's journey.

With multiple sales pipelines, you can accurately track multiple sales workflows for all of your products and markets. This feature helps define the sales process for every deal.



4: CUSTOMIZATION

For example, Zylker Cars is a car dealership company that has different sales processes for reselling used cars, selling new cars, and providing car servicing. Some of the basic sales stages will be similar across these three processes, but there will also be significant differences. The table below shows the different deal stages for each process:

New Cars	Used Cars	Service Requests
Gather requirements	Show available models	Request analysis
Test drives and car selection	Test drives and car selection	Repair process (ongoing)
Price quote	Price quote	Quality check and test drive
Negotiation	Price quote	Bill generation
Closed won/lost	Closed won/lost	Service request closed

As every process is different, putting all the deals through a single pipeline will not give a clear understanding of their progress. Therefore, Zylker Cars needs to create multiple sales pipelines to more accurately show how a deal is progressing.

[Learn more about creating multiple sales pipelines.](#)



4.6 Templates

Zoho CRM provides email templates, the reusable versions of an email which you send to multiple recipients. Use email templates to link to workflow rules, to send mass emails to multiple leads or contacts, and to send email notifications to Zoho CRM users when a workflow rule is triggered.

There are three ways to create an email template:

- ▶ Create an email template from scratch
- ▶ Choose a template from the pre-designed list of templates
- ▶ Insert HTML

4.7 Copy Customization

Bigger organizations with multiple branches or services may require multiple CRM accounts to operate across the organization. However, the core requirements remain the same for each CRM, so companies do not want to waste time customizing each CRM account individually. Zoho CRM comes with a solution to this problem in the form of the Copy Customization feature. This feature allows you to copy your organization's setup configurations from one CRM account to another new account.



4.8 Customize Home Page



The Home tab of Zoho CRM is a quick indicator of the progress of all your CRM activities. It contains components from different modules such as Tasks, Potentials, and Dashboards. One quick glance at the components of the Home tab will tell you how your sales activities are faring.

Besides indicating the progress of your CRM activities, the Home tab is also a great place to organize your day's work and make sure your team is all on the same page. You can do this using the three different views available for the Home tab of Zoho CRM.

Classic View: The Classic View contains three standard components: Tasks List View, Today's Events, and Pipeline by Stage. The critical components are organized by default, helping you plan your day better. The Classic View is unique to a CRM user and shows the user's Tasks, Events, and Pipeline. This view cannot be customized.

4: CUSTOMIZATION

User's Home Page: Individual users can customize the Home tab for their own account using the User's Home Page. You can add components that you want to look at to the User's Home. These components can be resized and moved around to fit on the page.

Customized Home Page: You can also create and share a common view for multiple roles based on what you want the users to view when they log into CRM. Once a Customized Home page is created for a particular role, the users with that role will have it as their default page each time they log in to Zoho CRM.

By default, the Customized Home page is displayed for all users if it is enabled for their role. If the Customized Home page is not created or activated for a role, the Classic View or the User's Home Page is displayed based on the user's prior selection. You can switch to different views on the Home tab from the dropdown list on the top-right corner.

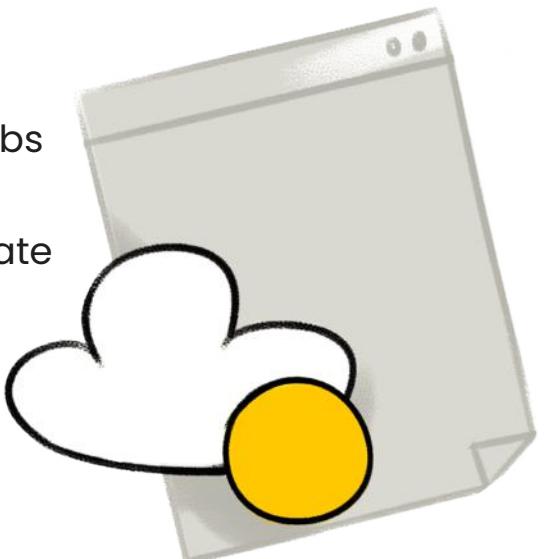


4.6 Translations

Zoho CRM provides an option for Administrators to translate the fields and picklist values in other languages for CRM users. The first step is to turn on the Translations setting. Then, you can add as many languages you need from the list of 26 predefined languages available in Zoho CRM.

4.7 Web Tab

Web tabs allow you to open web pages like company-wide announcements, web applications, etc. in Zoho CRM. All Zoho CRM users in the organization can view these web tabs. You can also create your own applications using Zoho Creator and access them in Zoho CRM. By default, the web tabs functionality is only available only to users with Administrator privileges. However, you can activate this function for other users if required.



5: AUTOMATION

5.1 Workflow Rules



A workflow rule lets you automate routine actions. Design a standalone rule or a series of rules based on needs. A workflow can also be a series of steps (tasks, events, interactions, or activities) necessary to complete a business work process. In a sequential workflow, each step must be completed before the next step can be started. In a parallel workflow, two or more steps can occur simultaneously.

[Learn how to set up workflow rules.](#)

5.1.1 Rules

A workflow rule in Zoho CRM is a set of actions (email notifications, tasks, and field updates) that are executed when certain specified conditions are met. These rules automate the process of sending email notifications, assigning tasks, and updating certain fields of a record when a rule is triggered.

5.1.2 Email Notifications

Email notifications are one of the actions which can be associated with a workflow rule. They are email alerts that are sent to leads, contacts, vendors, partners as well as users in your organization, depending on a given context. When you associate an email notification with a workflow rule, the selected email template is automatically sent to the chosen recipients when the rule is triggered for records meeting the criteria specified in the rule.

5: AUTOMATION

5.1.3 Tasks

Workflow tasks are one of the actions which can be associated with a workflow rule. A task is an activity that is assigned to a user. When you associate a workflow task with a workflow rule, it is automatically assigned to the user when the rule is triggered for the records that meet the rule's criteria.

[Learn more about creating workflow tasks.](#)↗

5.1.4 Field Updates

The Field Update option in Zoho CRM helps you update certain field values in the records automatically when the associated workflow rule is triggered.

[Learn how to automatically update fields.](#)↗

5.1.5 Webhooks

Webhooks facilitate communication with third-party applications by sending instant web notifications every time an event occurs in Zoho CRM. With webhooks, you can configure HTTP URLs and associate them with workflow rules to automate the entire notification process. For general information about webhooks, please refer to webhooks.org.



5: AUTOMATION

5.1.6 Custom Functions

Zoho CRM functions help you update the data in related CRM modules or third-party applications by executing simple program scripts. When a record matches the workflow criteria, the workflow engine automatically triggers the function and updates the CRM records. With functions, you can program scripts using Deluge Script (powered by Zoho Creator), associate them with workflow rules, and automate your business process.



[Learn more about working with functions.](#) ↗

5.2 Schedules

Schedules are automated user-defined actions which can be performed through functions either at a particular time or on a recurring basis. User-defined actions make it possible to create unique scheduling situations that can be executed periodically based on your requirements.

5: AUTOMATION

5.3 Actions

Specify the action to be automated for records that meet the set criteria.

Instant Actions: Add email notifications, tasks, field updates, webhooks, and custom functions, create records, or send notifications via Cliq, Slack, or Cisco Webex platform immediately when the rule is executed. For Edit or Field Update actions, you can also convert records to Leads, Quotes, or Sales Orders.

Scheduled Actions: Add email notifications, tasks, field updates, webhooks, custom functions, or send notifications via Cliq, Slack, or Cisco Webex platform scheduled for and triggered at a specified time.

5.4 Assignment Rules



Zoho CRM's assignment rule tool is designed to let you automate the lead assignment process by defining rules for how leads are assigned to agents or reps. You can configure different criteria based on your industry's specifications like territory, product interest, lead source, etc., so that only the leads that satisfy the criteria will be automatically assigned to the selected rep. Automating the lead assignment process, can save you a lot of time and work and avoid user errors that may occur during manual assignment.

[Learn more about working with assignment rules.](#) ↗

5: AUTOMATION

5.5 Case Escalation Rules

If cases aren't solved promptly, Zoho CRM can automatically escalate the overdue cases to the relevant manager or sales rep. You can configure a simple set of rules based on various criteria like priority, case name, or the time at which a case was created to govern these actions and manage cases more efficiently.

[Learn how to set escalation rules.](#) ↗

5.6 Scoring Rules

Scoring rules help you prioritize leads, contacts, accounts, and deals based on record properties like fields and customer touchpoints such as calls, emails, and SocialSignals. You can assign positive and negative points to each property while defining a scoring rule. These individual points add up dynamically to a total score when a record is created or modified.



[Learn more about setting up scoring rules.](#) ↗

5.7 Marketing Attribution

Marketing campaigns play a crucial role in any business, as they improve consumer reach and awareness. Most companies prefer integrated campaigns since multiple channels achieve better and more consistent brand promotions. In general, sales and marketing cycles in any business are lengthy processes that last for months and it's likely that the buyer interacts with your company many times through multiple channels during this period.

It's essential to track and capture the touchpoints that help close the sale, so you can tell whether your campaigns are actually driving revenue and identify which campaign actually moved the buyer down the decision path. This is where marketing attribution adds value.

5.8 Segmentation

Segment your prospects and customers into buckets based on predefined criteria to identify cross-sell and upsell opportunities and execute targeted campaigns to increase engagement, improve retention, and deliver better ROI.

The most common metric used for a post-purchase segmentation is RFM. This evaluates the customers based on recency, frequency, and monetary values.

- ▶ Recency: When was the last time they made a purchase?
- ▶ Frequency: How often do they purchase from you?
- ▶ Monetary: How much did they spend?

These metrics help you to segment the customers into homogeneous groups, understand their traits based on past purchases, and engage them with more personalized campaigns.

[Learn how to set up RFM-based segmentation in Zoho CRM.](#) 

6: PROCESS MANAGEMENT

6.1 Blueprint



Blueprint, a tool in Zoho CRM, guides users through what actions must be taken at what time, and prompts them for the right information in the right sequence. Blueprint is designed to streamline and execute a business process in a well-defined and systematic manner. With a Blueprint, you can:

- ▶ Define the sequence of stages in a process
- ▶ Associate the right people with each stage
- ▶ Guide your teams through the execution of the process
- ▶ Mandate and validate important information in context
- ▶ Automate routine actions

[Learn more about getting started with Blueprint.](#)

6.2 Approval Processes

Your sales team often needs approval from their senior managers, for example, for pricing discount requests, contract review requests, capital expense approvals, vacation time approvals, and document approvals. Zoho CRM offers a dedicated approval management system running behind the scenes to standardize approval processes and save time by creating a dependable, repeatable system.

[Learn more about creating an approval process.](#)

6: PROCESS MANAGEMENT

6.3 Review Processes

The impact of your sales team depends on the quality of information they get from your CRM. Inaccurate or missing information can hurt a sales rep's chances of closing a deal. Zoho CRM helps your organization define a review process where a user or team of your choice can vet incoming information before approving or rejecting it. They can add comments and provide reasons for rejection to ensure your sales team has access to all the information they require.

[Learn more about creating review processes.](#) 

6.4 CommandCenter



Today, customers can interact with your brand via a range of channels, and follow a variety of organic paths before reaching a purchase decision. And they expect individual attention at every step along the way. Zoho CRM's CommandCenter helps you provide and keep track of thousands of personal journeys without compromising on brand experience.

CommandCenter allows you to create the customer journey (or other business processes) and add automated condition-based workflows across modules in Zoho CRM. It is ideal for organizations that have several departments, services, or third-party applications participating in a single business process.



6: PROCESS MANAGEMENT

For example, you might orchestrate the following cross-module process: When a customer (from the Accounts module) places an order for a product (from the Products module), check the stock (in the Inventory module) and if the product is out of stock, place a supply order to the vendor (in the Vendors module), and send an email or SMS notifications to the customer with delivery updates.

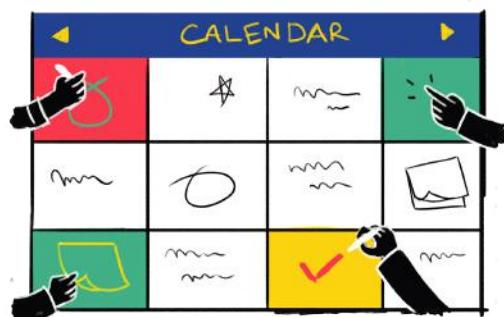
[Learn how to set up process orchestration using CommandCenter.](#) ↗

6.5 Calendar

Plan your demos with prospects, calls with customers, training sessions, and just about any business appointment using Zoho CRM's built-in calendar.

You can use your group calendar to check a lot more than just your colleagues' availability to attend calls or meetings. Filter your colleagues based on territories and other relevant criteria when you have to pass on specific information. Call prospects directly from your calendar and avoid the trouble of searching for phone numbers.

Turn a one-time event into a recurring one by checking a box to add it to your participants' calendars. Set up email reminders for participants who have not responded to invites and notify others about upcoming events with just a click.



7: DATA ADMINISTRATION

7.1 Import

Data can be gathered through various sources such as purchasing a record database, collecting details at trade shows, and campaigns. Importing records from such external sources to a CRM is one of the most important lead creation activities in any business, so importing should be easy and help you maintain clean data without duplicates.

If the import file is in .XLS, .XLSX, or .VCF format, you can import a maximum of 5000 records/batch for all CRM editions. To import more than 5000 records/batch your import file must be in .CSV format and the maximum number of records that you can import will vary according to your subscription.

[Learn more about importing data in Zoho CRM.](#) ↗

7.2 Export

The Export Data feature in Zoho CRM allows you to export data in CSV format from individual CRM modules. After exporting the data, you can validate or store the data on your own servers. You can export a maximum of 3000 records from a module.

[Learn how to export data from Zoho CRM.](#) ↗



7: DATA ADMINISTRATION

7.3 Data Backup

The Data Backup feature allows Zoho CRM users with Administrator privileges to make a complete backup of the CRM data. Data in Zoho CRM is completely secure. However, it is recommended that you periodically backup data if you want a copy of your files for your reference offline, or to perform a mass update by taking a backup, editing the values directly in the files and re-importing the data, or when you are migrating to another CRM system.

The data backup takes anywhere from a few minutes to several hours depending on the size of the data that needs to be archived.

The smaller the data volume, the less time it takes to complete the backup. The backup can be downloaded from

Setup > Data Administration > Data Backup.

The backup download link will be active for 7 days from the date of backup.

[Learn more about backing up data.](#)



7.4 Storage

The storage space is the total space occupied by the records in the standard and custom modules, including any notes that are added to the records. It also includes the space occupied by the data in your recycle bin.

Data storage is calculated by taking the size of the records that you store in every module, the notes added to the records, and the data stored in the recycle bin.

[**Click here**](#) to view the availability of data storage space in Zoho CRM by edition

For example, if you subscribe to the Professional edition and purchase 2 user licenses, you will get a total storage space of 5 GB + 20 MB (10 MB for each user). You can purchase up to a maximum of 5 GB of additional data storage to expand the storage limit to a maximum of 10 GB (plus the 20 MB from the user licenses).

For your reference, the data consumed by one record in any module is approximately 2 KB, and for one note or email approximately 1 KB.

Please note that the table above is subject to change, and we recommend you to check the updated data storage availability [here.](#) 

[Learn more about space storage.](#) 

7: DATA ADMINISTRATION

7.5 Recycle Bin

All the records and files that are deleted from your Zoho CRM account will be stored in the recycle bin. You can restore the records from the recycle bin within 60 days, after which they will be permanently deleted from your CRM account. You can also manually delete the records from the recycle bin before the default deletion period.

[Learn more about working with the recycle bin.](#) ↗

7.6 Audit Log

The Audit Log is a chronological sequence of the actions performed by users in Zoho CRM. Audit logs are helpful to determine what happened before and after an event and to identify records associated with certain events. Users with an administrative profile can access this feature.

[Learn more about working with audit logs.](#) ↗



7.7 Sandbox

As your organization grows so does the complexity of your sales processes. Any small error in a process can have a domino effect. No organization can afford this. To help avoid this, Zoho CRM offers Sandbox, an environment to test your Zoho CRM settings before you implement them in production setup. This way, you can feel much safer about the changes to your settings, as you can now test them, identify any issues, and fix them before you make any changes to your actual working setup.

[Learn more about using Sandbox.](#)↗

7.8 Navigate Records

Navigation in Zoho CRM allows easy movement between records, allows you to choose the number of records to be displayed on one page, and saves time when accessing records. The two navigational options available in Zoho CRM are:

Page-level navigation allows you to move from a page with a list of records to the previous or next page.

Record-level navigation allows you to move from one record to the previous or next record.



7: DATA ADMINISTRATION

7.9 Webforms

Webforms simplify and automate the process of capturing visitors' and users' information from your website into your CRM system. Depending on how the information is captured in CRM modules, Webforms serve as an important lead sourcing avenue for most organizations.

7.10 Tags

Tags are unique identifiers or labels that can be associated with your CRM records to search, sort, categorize, filter, and segment records in a more efficient way. They allow you to add keywords or additional information to any record in CRM. For example, there may be some leads in your CRM account that are high priority. You can tag those leads as "Important", so that you can easily filter them from the other leads in your CRM account.

Tags in Zoho CRM are specific to each module and are usually public and can be accessed by all Zoho CRM users.

7.11 Document Library

Brochures, PDF docs, RFPs, invoices, comparison docs, guides, presentations, and forms are just some of the documents that people frequently use in business. You may make changes to these business resources and keep them up to date and relevant. You need to keep them in a dedicated document repository, where you can organize and manage all your business-related files and share them with people in your organization.

The Documents tab in Zoho CRM acts as a library where you can upload various types of files and share them with users based on their profile permissions in the organization's CRM account. Provide more context to your records by associating documents to records (via the documents related list).

7: DATA ADMINISTRATION

7.12 Filter

The Filter option in Zoho CRM, helps you find specific records within large volumes of data.

Create advanced filters that add context to your search, so you can filter out the records that you need to concentrate on and decide on the best course of action. You can use advanced filters to discover untapped leads, discover records that are likely to convert, filter contacts based on their deal stages, and much more.



7.13 List View

In Zoho CRM, you can sort, categorize, and view your records in three different ways: List view, Kanban view, and canvas view.

In the list view, the records are grouped by a defined set of criteria. List views are categorized as Created By Me and Shared With Me. You can also mark list views that you often use as Favorites and those will be listed first in the List View dropdown. There are two types of list views available in Zoho CRM:

Standard List Views: Zoho CRM provides a set of list views that can be used by all the users in your organization. You can modify the standard views and sort the order of the columns in the list. You cannot delete these list views.

Custom List Views: You can create list views and define your own criteria for the records are filtered by. You can modify and delete custom list views and sort the order of the columns in the list.

7.14 Kanban View

Kanban view is a card-based view that displays data in an organized manner for better comprehension. For example, you can sort the leads based on their status or categorize sales based on different stages. This sorting of information gives better insights about potential bottlenecks and lets you fix them effectively.

Compared to the list view, where all the records are listed one after the other, a Kanban view segregates your data based on the lead status. You can also view the aggregate revenue for each status. You can create such Kanban views for all modules except Visits and Finances. There are two types of Kanban view in Zoho CRM: Predefined and customizable

7.15 Canvas View



Canvas view in Zoho CRM lets you sculpt a fully personalized view of your CRM records. You can customize the way the records are displayed to meet your business needs. You can use Canvas to add record images for better identification, use custom buttons to represent fields, use specific font styles and sizes, change the alignment of field types, group similar field types, and much more. In other words, you can completely customize the way your CRM records are displayed.



8: ANALYTICS

8.1 Sales Funnel

The sales funnel is a cylinder-shaped visualization of all of a company's in-progress sales opportunities, sorted by sales stage. Sales management and executives often use the sales funnel as a way of quickly gauging sales performance; a robust funnel across all stages is good, but a funnel with few or no leads in certain stages can signal future dips in revenue and subsequent operating cash flow.



A business typically has more early stage (wider top) and fewer ready-to-close opportunities in the funnel and then even fewer close-to-won opportunities (narrow bottom), creating a funnel shape.

8.2 Ad-hoc Reporting

Ad-hoc reporting is a function in business intelligence (BI) tools. "Ad-hoc" literally means "as the occasion requires," meaning reports are created for a specific situational purpose. Ad-hoc reports can be as complex and customizable or as simple and plain as desired, and are therefore often used by non-technical users. Ad-hoc reports can also be described as one-off or one-time reports that are created in a quick, unprepared, or improvised way.

8.3 Anomaly Detector

An anomaly detection offers meaningful insights about the business's trends which can play a critical role in influencing key decisions. Decision makers can change existing processes or assimilate better ideas and plans by observing what brings positive changes to their overall business health. For example, a sudden dip in purchases, lead conversions, or an increase in students dropping out of courses can indicate a negative deviation from the regular pattern, while a surge in purchase frequency or website visits indicates a positive trend. You can observe these anomalies, draw conclusions about what they mean, and take the necessary follow-up actions.

Zoho CRM's anomaly detector can help you identify deviations by populating the real-time data sets into an expected pattern and flagging data points that lie outside this pattern.

8.4 KPI

A Key Performance Indicator (KPI) is a standard measurement that demonstrates the effectiveness of your sales team in achieving important business objectives. KPIs can be used as useful analytics to help sales personnel increase their productivity by measuring their performance on a regular basis. For example, a sales manager wants to monitor the top 10 sales reps in terms of the average annual revenue each of them have achieved. To do this, the manager can create a ranking KPI by defining the average annual revenue as the KPI metric.

From a scorecard that follows top deals to a dashboard that monitors current growth indices, Zoho CRM's KPIs give you a complete picture of your essential sales figures so that your team can identify and concentrate on the areas that need improvement.

8.5 Comparator

Compare a variety of metrics across multiple modules, such as users, teams, roles, and territories. Create a comparison table, add a range of parameters, and track how your metrics fare against each other.

Zoho CRM provides you with three types of comparator visual styles to suit your preference: Elegant, Sport, and Classic.

You can also add an extra dimension to your comparator charts by comparing the current numbers with your past records. For example, one of the KPIs you use to measure your sales reps' performance is the number of closed deals. You can show the increase and decrease in the number of created leads in your current quarter to the last quarter.

8.6 Target Meter

The target meter lets you set and monitor targets for your sales team. You can view the number of leads generated in the current year, annual revenue for last quarter, or sales target achieved in the past few months. You will not have to go through a pile of reports to get this information; all you need to do is choose a target meter and define the relevant parameters to get the data.

Revenue, leads, deals: whatever your goal is, the target meter keeps your expectations realistic and helps you see what you've achieved, what you haven't, and what you're close to achieving.

8.7 Cohort Analysis

Cohorts are groups of users, customers, or data that share similar characteristics at any point in time. Cohort analysis can be helpful for understanding customer behavior across the sales life cycle or buying trends and patterns, analyzing support costs over a specific period of time, or other similar metrics. Results drawn from the analysis can be used to adjust existing services or products offered to the identified cohorts and observe the resultant impact on the overall health of the business.

Cohort analysis can be used to illustrate your customer retention over the span of a year, deal-conversion trends for a particular quarter, and time taken to close deals for a particular month. You can add more insight to these analysis by filtering each of them by sales rep, region, product, and more.

8.8 Quadrant Analystist

If you have a large amount of sales data in your Zoho CRM, quadrant analysis can allow you to scatter the data that you want to analyze or measure into four quadrants. You can analyze data such as the type of campaign versus the revenue generated to identify the campaign type that was most effective or leads created versus lead source to identify the source you are gathering most leads from for the company.



8: ANALYTICS

Use Zoho CRM's quadrant analysis to illustrate complex data in a consistent, comprehensive framework to identify the areas you need to focus on in your sales process. Let's say that you have a large volume of historical sales data dating back five years. You need to segment the data based on your profit margins relative to sales to answer questions like: Are low profit margins and high sales causing us to lose money? What products with a high profit margin but slow sales should we focus on? Quadrant analysis helps you uncover these types of correlation in huge volumes of data.

8.9 Gantt Chart

A Gantt chart is a visual representation of the project schedule. It displays information about task progress, task owner, task status, and other task-related data. The users of the Zoho CRM account which the Zoho Projects extension is added to can view different types of reports.

To view the Gantt chart in Zoho CRM:

1. Select the Projects tab on the top navigation bar.
2. Select the tab on the inner navigation bar for the project you want to work on.
3. Click Reports in the left navigation bar and select Gantt Chart.

In Zoho Projects, you can view the Gantt chart with two different views:

Milestone Gantt: Milestones, task lists, and tasks are displayed based on their hierarchy in the project.

Chronology Gantt: Gantt bars are displayed based on the order of their start date in the project.

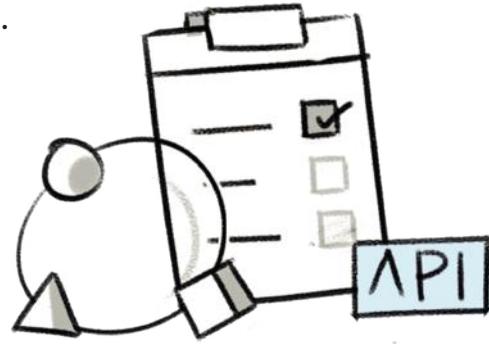
9: DEVELOPER SPACE

9.1 Zia Voice

Zia helps you to get instant answers for all your questions about data in Zoho CRM. Zia provides a conversational interface where you can ask questions about any module in Zoho CRM.

9.2 APIs

API stands for Application Programming Interface. An API is a software intermediary that allows two applications to talk to each other. In other words, an API is the messenger that delivers your request to the provider that you're requesting data from and then delivers the response back to you. Use Zoho CRM's APIs to connect multiple data sources, enhance your workflows with additional data, and maintain a single point of truth.



REST APIs: Access and work with almost all of Zoho CRM's components using REST API. Fetch, create, update, or delete any sort of information stored in your account. Use simple HTTP methods to fetch components like records, modules, and custom views.

Bulk API: Effortlessly retrieve or upload large amounts of data using a single bulk API call. This is an asynchronous API and is great for performing tasks as a background processes like migration, data backup, and initial data sync between Zoho CRM and external services.

9: DEVELOPER SPACE

Notification APIs: Keep track of all the changes to your data by subscribing for instant notifications using Zoho CRM's notification APIs. Get automatic notifications when there are changes to your Zoho CRM account without having to manually check for updates.

Query APIs: Construct your own queries to fetch data from your Zoho CRM account. Similar to MySQL, CRM Object Query Language (COQL) uses a simple SELECT query structure to fetch as many as 200 records from Zoho CRM using a single query API call.

9.3 Connector

Connectors are a simple authentication mechanism to connect your Zoho CRM account with any third-party application. Connectors can be used to invoke any third party application's REST APIs and get access to your authenticated data from your functions or widgets.

Zoho offers integration support for a wide range of third-party applications, including core Google services (Contacts, Calendar, and Google Ads) and Microsoft software (MS Office, MS Outlook, etc.). However, there are some services that cannot be integrated directly with your CRM, such as Dropbox, PandaDoc, and Google Drive. In these cases, you can use a connector to expand Zoho's third-party support. Connectors use OAuth 2.0 protocol to facilitate this integration.

[Learn more about how to create a connector.](#) ↗

9.4 Functions

Functions in Zoho CRM follow Serverless Computing architecture. This is a cloud computing execution model in which the cloud provider dynamically manages the allocation of machine resources. Zoho CRM provides options for the customer to write their own functions using Deluge script and run their code (proprietary within Zoho CRM) without worrying about deploying their code on servers. Although it is called "Serverless", server management is automatically taken care of so that users and customers will not notice.



Zoho CRM functions help you to update the data in related CRM modules or third-party applications by executing simple program scripts. Set up functions so that when certain criteria are met, the CRM automatically triggers the function and updates the CRM records. With functions, you can program scripts using Deluge Script (powered by Zoho Creator) and associate them with workflow rules, custom buttons, related lists, schedules, and more.

9.5 Widgets

The provision to include external services to Zoho CRM helps to extend the functionalities of your application. Zoho CRM's Widgets, enable you to build embeddable UI components in the CRM and integrate them with the external application seamlessly. Widgets in Zoho CRM are embeddable UI components that you can create on your own, using our JS Software Development Kit. These widgets can be used to perform certain functions that utilize data from third-party applications seamlessly.

Read [this article](#) on working with Widgets.

9: DEVELOPER SPACE

9.6 CRM Variables

CRM variables are pseudo-module fields that are used to store static and reusable information in your Zoho CRM account.

A CRM variable can have a unique set of values and can be used as a merge field in email templates, mail merge templates, and inventory templates. It can also be used as a reusable authentication parameter in functions, custom links and buttons, webhooks, related lists, and APIs.

9.7 SDKs

An SDK lets businesses and individuals create their own applications. Custom apps provide tailor-made, customized user experience for employees, higher officials, customers, business partners, clients, or whoever needs to access it. However, no matter what development kit you use to create your business app, it needs to be integrated with your CRM system. With the added benefit of a robust SDK solution, you provide your users with an app that meets their needs.

Server Side SDKs provide you with the means to create client applications with ease that access the required APIs. They are a wrapper for REST APIs, making it easier to use the services of Zoho CRM.



9: DEVELOPER SPACE

Every SDK in any language provides all of the necessary codes, so you only need to create instances and fill in the necessary properties and access the required response instance properties while the HTTP requests and responses are taken care of by the SDK.

Mobile software development kits (SDKs) are sets of tools that facilitate the creation of various mobile applications, from simple ones that can be created in minutes to complex ones that have a lot more functionality.

9.8 COQL

COQL (CRM Object Query Language) is an SQL-like language for querying data in Zoho CRM. It has some major advantages over the searchRecords API: you can use extra search operators (like, not equal, greater than, etc.) and you can join multiple modules together.



10: Zia

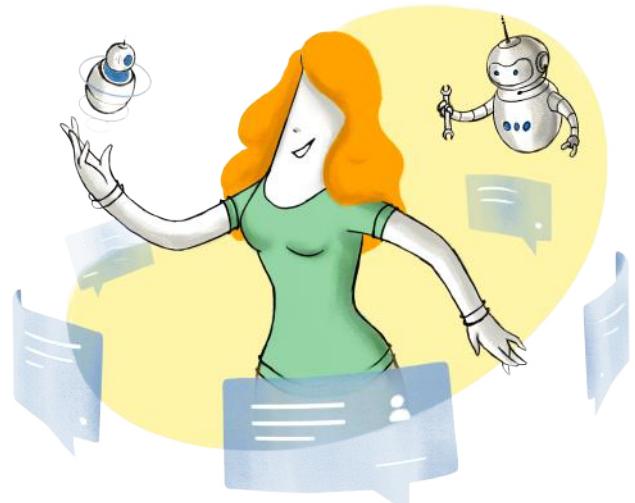
10.1 Recommendation

The Zia recommendation tool uses artificial intelligence to identify and analyze customer data such as purchase details, interests, requirements, and behavioral patterns to suggest the most relevant product. It also compares the behavioral patterns of other customers with similar attributes to recommend the right product or service.

A recommendation engine can make a significant difference to the overall revenue, sales, purchases, conversions, click-through rates, cross-selling, and upselling in your business. You can also use the suggested results to modify every aspect of your marketing activities.

10.2 Communication

Zia notes the time when a customer answers your call or replies to your emails, how long they take to respond an email, how soon they reply to your emails, and the time of day when they most often reply or answer your call to suggest the best time to send an email or call.



10.3 Zia Voice (Conversational AI)

Over the past few years, Artificial Intelligence has been pushing the boundaries of what business tools can do. AI that can talk has been around for sometime now but it has recently started to show up in apps like CRMs.

Zia helps you to get instant answers for all your questions about data in Zoho CRM. Zia provides a conversational interface where you can ask questions about any module in Zoho CRM.

10.4 Zia Vision

Zia uses high quality image processing and deep learning techniques to intelligently identify image discrepancies in your incoming data based on your training image samples. Zia helps you filter permissible images according to your organization's preferences.

10.5 Notifications

Zia is programmed to alert you when she senses anomalies in your workflows and in your records. You can determine the type of alerts you want to receive.



10.6 Predictive Sales

When there are too many deals in the sales pipeline, it's hard for salespeople to chase the right leads. With Zia, that's no longer a problem. She can predict the win probability of every ongoing deal and assign a dynamic score based on how close they are to conversion. Zia can also detect upcoming anomalies in your sales trends, giving you enough time to avoid a drop in revenue or prepare for a surge in incoming leads.

Make smarter sales pitches: Zia can help you by finding the product that a lead is most likely to be interested in. Zia collects data from every touchpoint that your contacts have with your brand, and can analyze it to help you write a sales pitch that works.

You may also make use of predictive AI with Prediction Builder, a tool for building custom Zia predictions from scratch for any module in Zoho CRM.



11: ZOHO DIRECTORY

11.1 Single Sign-On (SAML)

Enabling SAML will allow users to authenticate themselves through their identity provider or domain. For example, if SAML is enabled for zylkercorp.com, then users logging in from that domain will be verified for Zoho CRM and logged in.

11.2 Security Policies

Security policies are sets of customizable rules that govern how your users can authenticate themselves. They consist of four components:

- ▶ **Password policy:** This component dictates how strong the users' passwords must be and how often they have to be renewed.
- ▶ **MFA:** This component dictates which multi-factor authentication modes the user can use to sign in.
- ▶ **Allowed IPs:** This component dictates which IP addresses the user can use to sign in. Any sign-in requests from IPs that aren't allowed will be denied.
- ▶ **Session management:** This component dictates how many active sessions a user can have and how long an active session can last.

11.3 Active Directory Sync

Maintain a common repository for users' details by syncing data with the active directory. Configure sync settings so that there is only a one-way sync which will preserve data sanctity in the directory at all times.

11.4 Login History

Capture all login history to know a user's login time, login device, number of logins, and the apps (if third-party applications are integrated with CRM) they have logged in to.

Quick Links :

1. Stuck with something on Zoho? Post your question and let the Zoho Community help you.

help.zoho.com/portal/community/all ↗

2. Stay up to speed with all the important discussions and announcements with our monthly Community Digest:

help.zoho.com/portal/community/tag/communitydigest ↗

3. Getting started with Zoho CRM? Check out these training videos.

zoho.com/crm/resources/training-videos/ ↗

4. Check out upcoming meetups and other events from the Zoho Community:

community.zoho.com/meetups/ ↗

5. Enhance your Zoho experience by adding extensions/plug-ins from Zoho Marketplace.

marketplace.zoho.com/home ↗

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