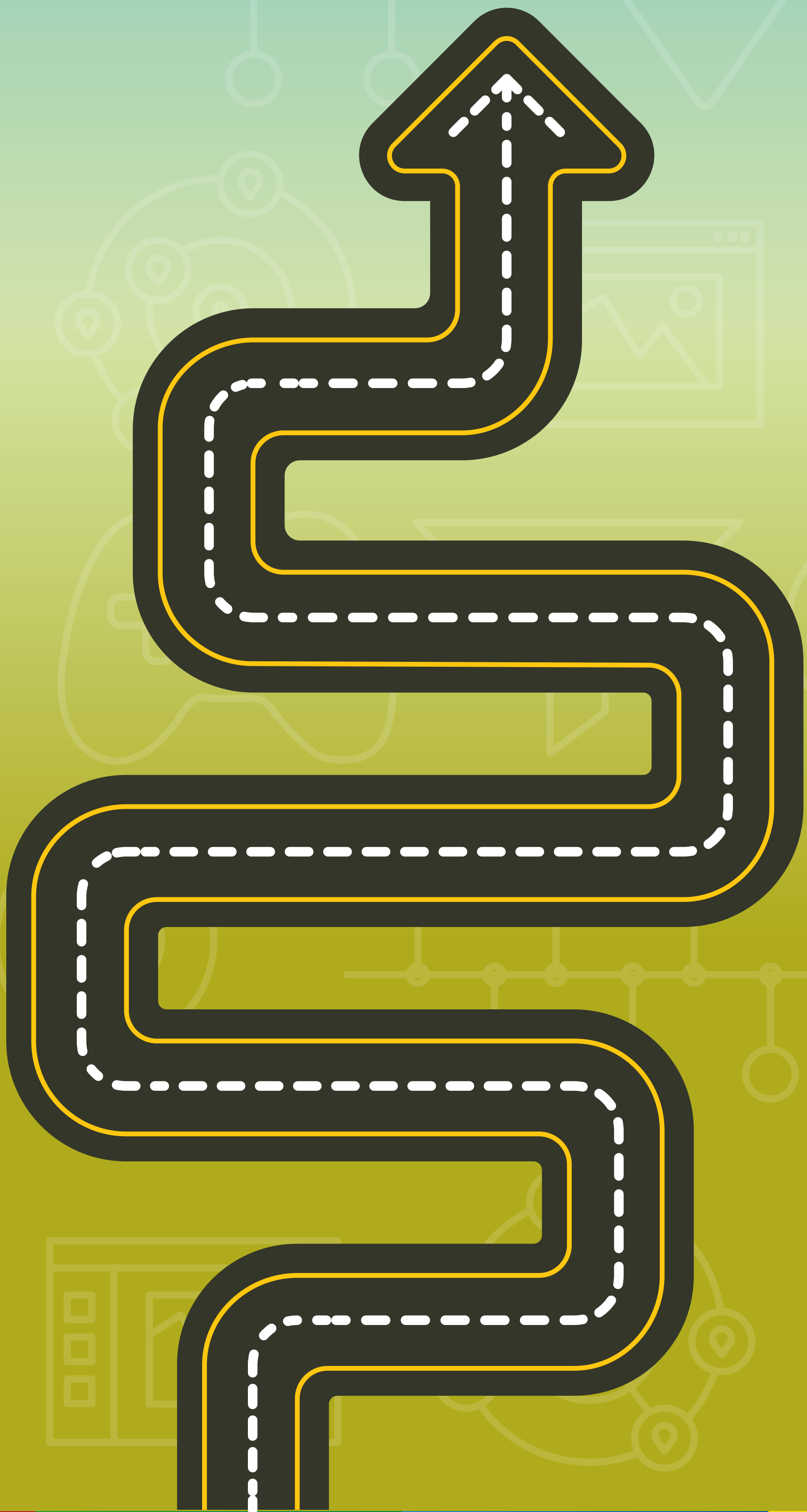
ZOHO CRM

2016



READ ME

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Zoho CRM 2016 - What's New and Improved

1. Multiple channels, one conversation.

- IMAP Integration
- Email Insights
- Social Selling
- Call Analytics

2. Gain actionable insights.

- GameScope
- Reports
- Dashboards

3. Be productive.

- CalDav
- Workflow Automation
- Advanced Filter
- Zoho CRM Home
- Setup
- CRM Views
- Record's details page

4. Security and access privileges.

- Record-level Sharing
- Users & Control

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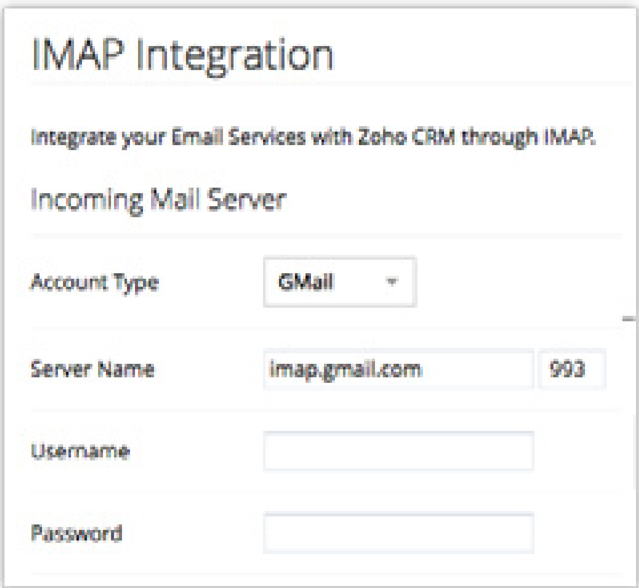
1. Multiple channels, one conversation.

IMAP Integration

Access customer emails on the fly.

Email remains one of your most important mediums of communication with your leads, prospects and customers. So why is it that your CRM data and emails are stuck in separate tabs? Set up your primary email account using IMAP and receive mails from your business email clients such as Zoho Mail, Gmail, Google Apps or Yahoo inside CRM. IMAP makes sure that you can see all your emails on all your devices and at all times.



Configure your email account in Zoho CRM via IMAP Integration, to receive your customers' emails inside Zoho CRM. Since the IMAP protocol enables multiple device sync, you can reply to customers' emails on the move. Learn More

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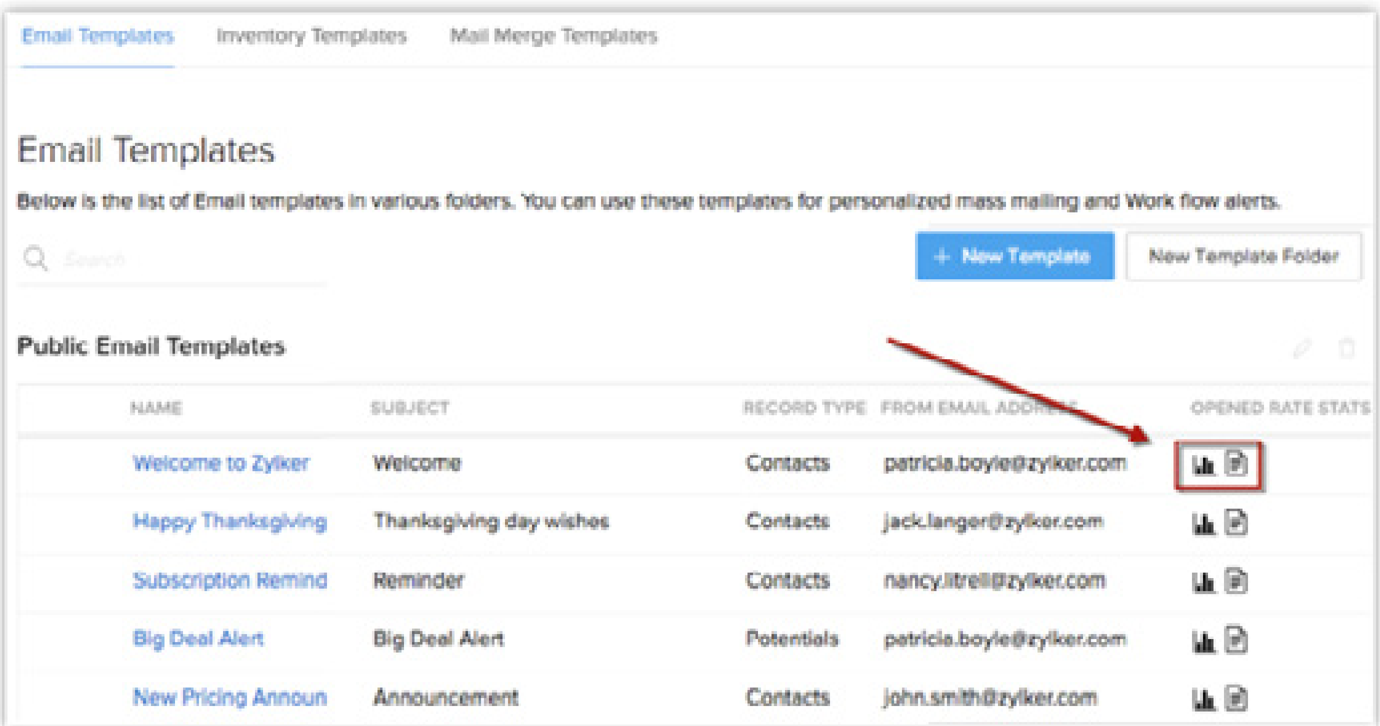
Email Insights

Insights for successful email campaigns.

You need to know how your email campaigns have been received, and which ones have got the best responses. Find out the behavioral response patterns of your leads, prospects and customers. Get comprehensive reports on how each of your email campaigns performed.

Template Analysis

Create a unique list of email templates and view a detailed report of the top performing templates. This will include figures on templates sent to the users, the highest tracking rates, ones with the highest open rates, and most replies.



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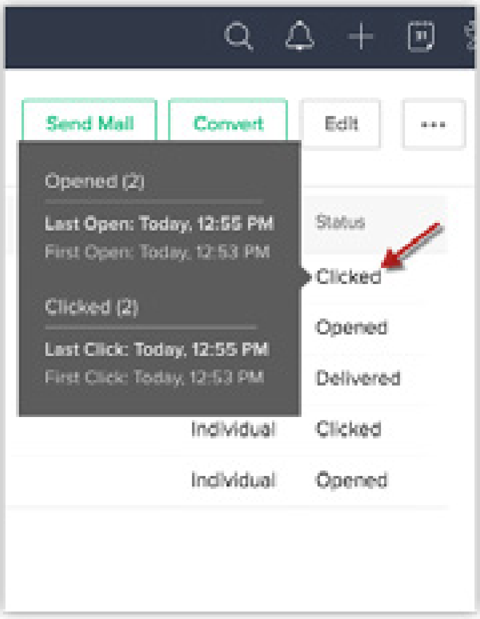
Open rate analysis

Get comprehensive statistics on who opened your emails or clicked on links, so it's easier to follow up. Learn More



Percentage-wise

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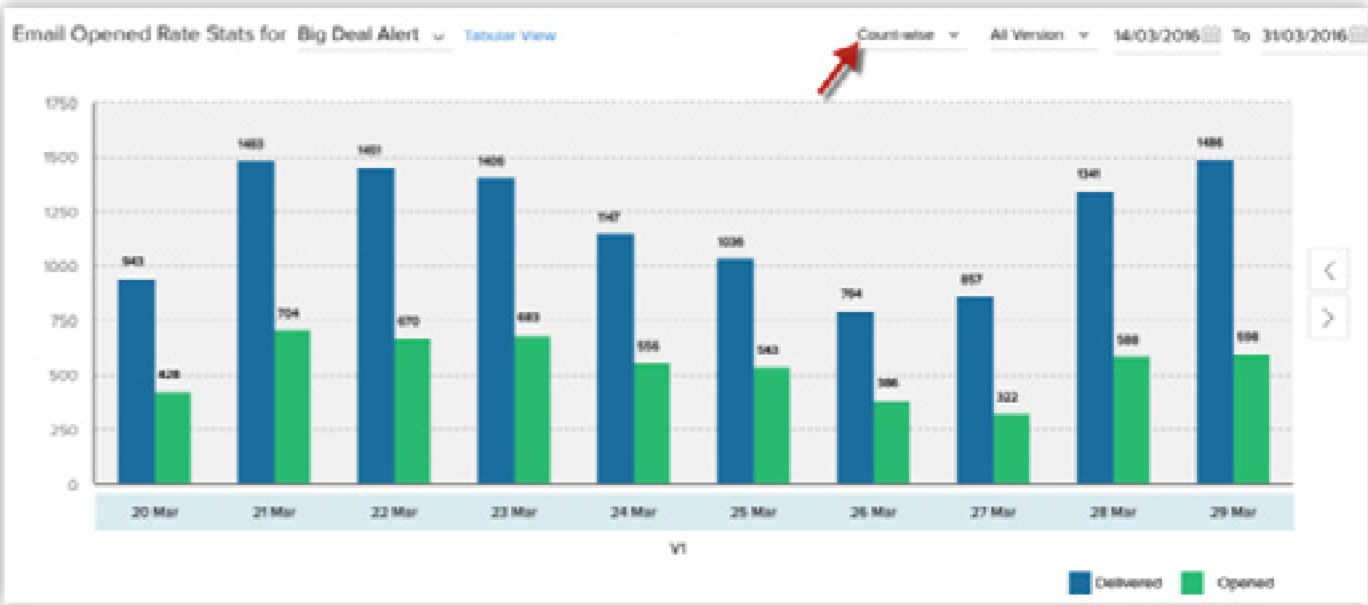
Count-wise



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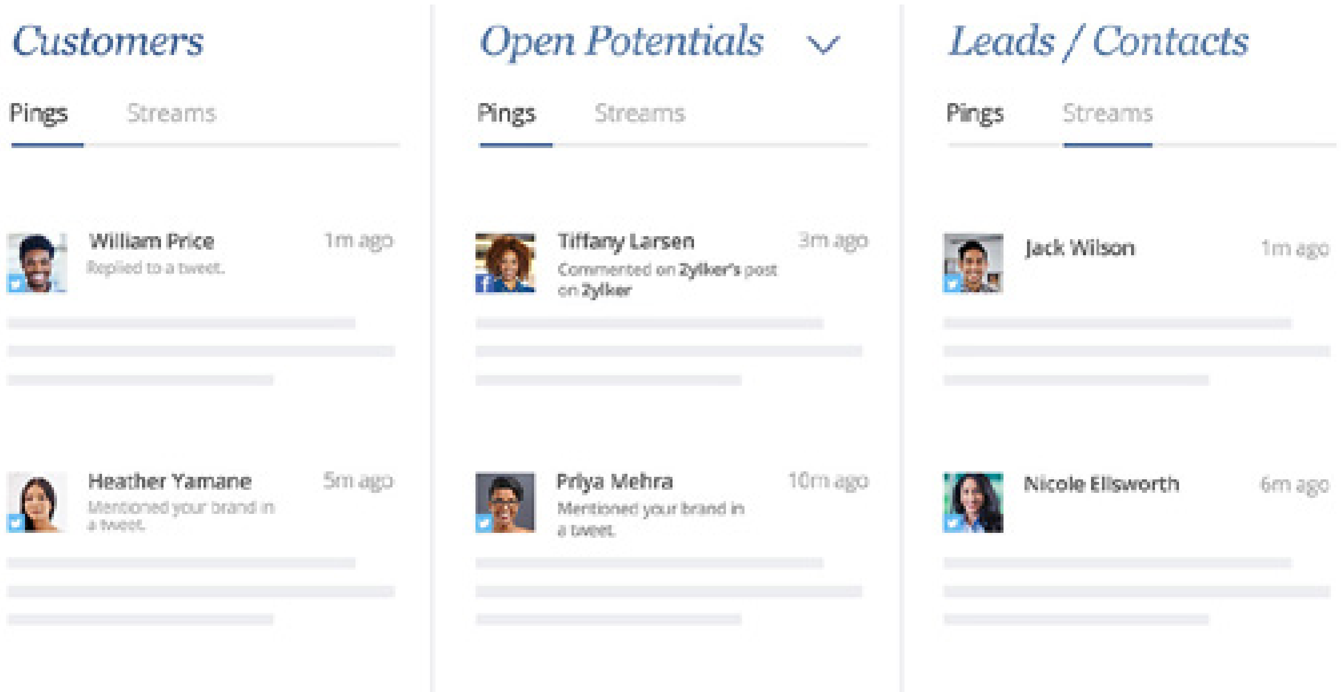
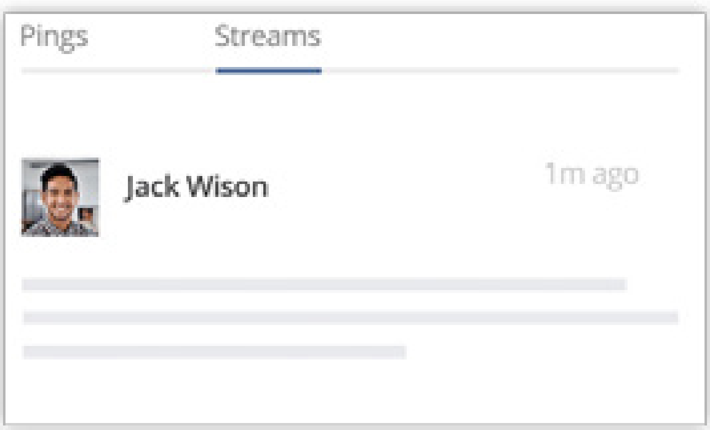
Social Selling

Connect, engage, and sell more.

Manage all your social conversations across Google+, Facebook and Twitter. Make real-time responses to posts from your prospects and leads when they happen. Track @ mentions, maintain personal handles and pull info from social media directly into CRM and a lot more.



Use Streams to get real-time social updates from your contacts. Or switch to Pings to receive notifications when your contacts mention or tag your social pages and handles. [Learn More]



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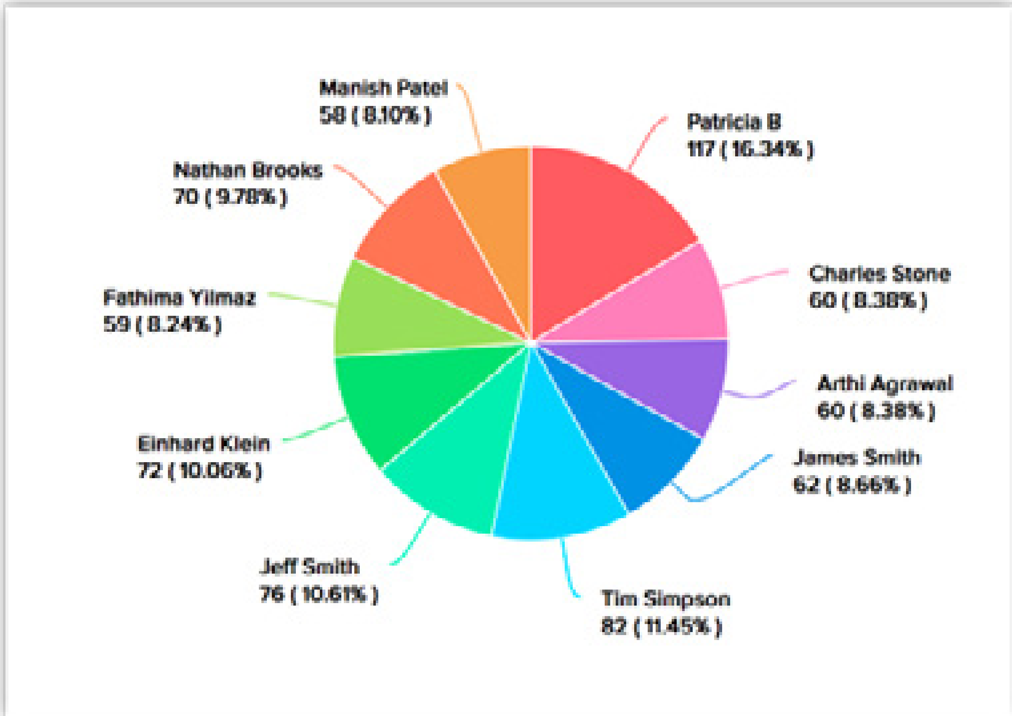
Call Analytics

Calls are usually difficult to track, but important nonetheless. Use call analytics to stay updated on all telecommunication like:

- Number of unanswered calls
- Calls scheduled vs calls made etc.

Calls made by each sales rep



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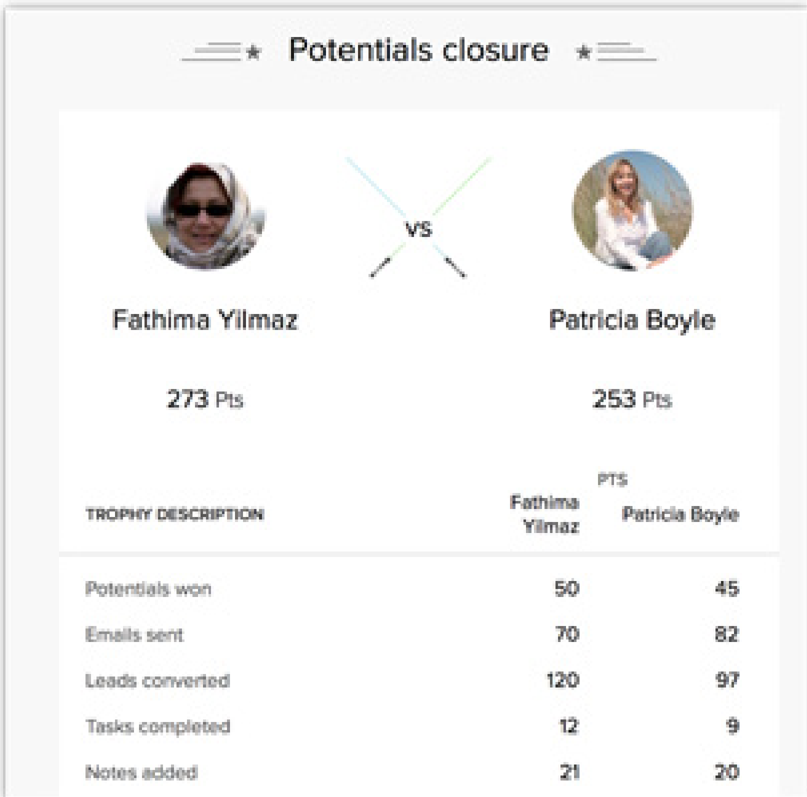
2. Gain actionable insights.

GameScope

Liven up your workplace.

GameScope for Zoho CRM is way more than just leaderboards or rewards, and involves more than creating games with entertainment value. It is a way to liven up your workplace and change the way you work.

Set up fun sales contests with the peer-to-peer GameScope feature. Use trophies and badges to motivate and engage your sales team. [Learn More]



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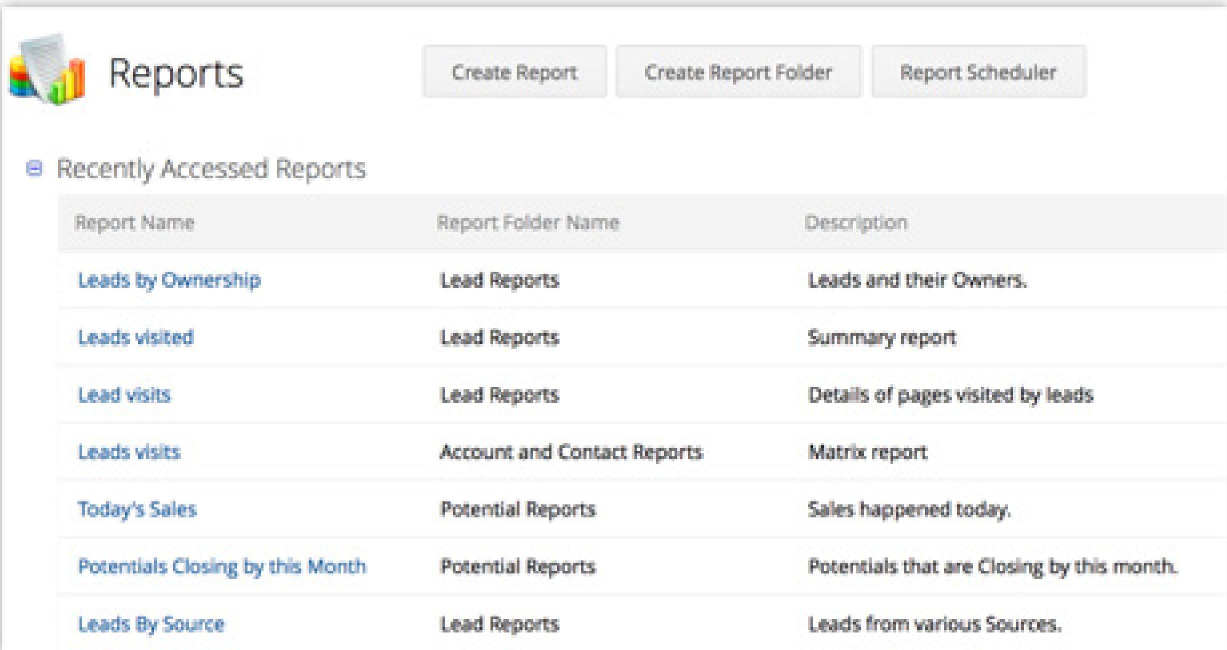
Reports

Reports every business leader needs.

Reports help you track trends in sales, marketing, customer engagement, and identify the road blocks in your sales process.

Reports in Zoho CRM 2016 now come with additional folders and options, besides having an improved interface.

Reports - Before



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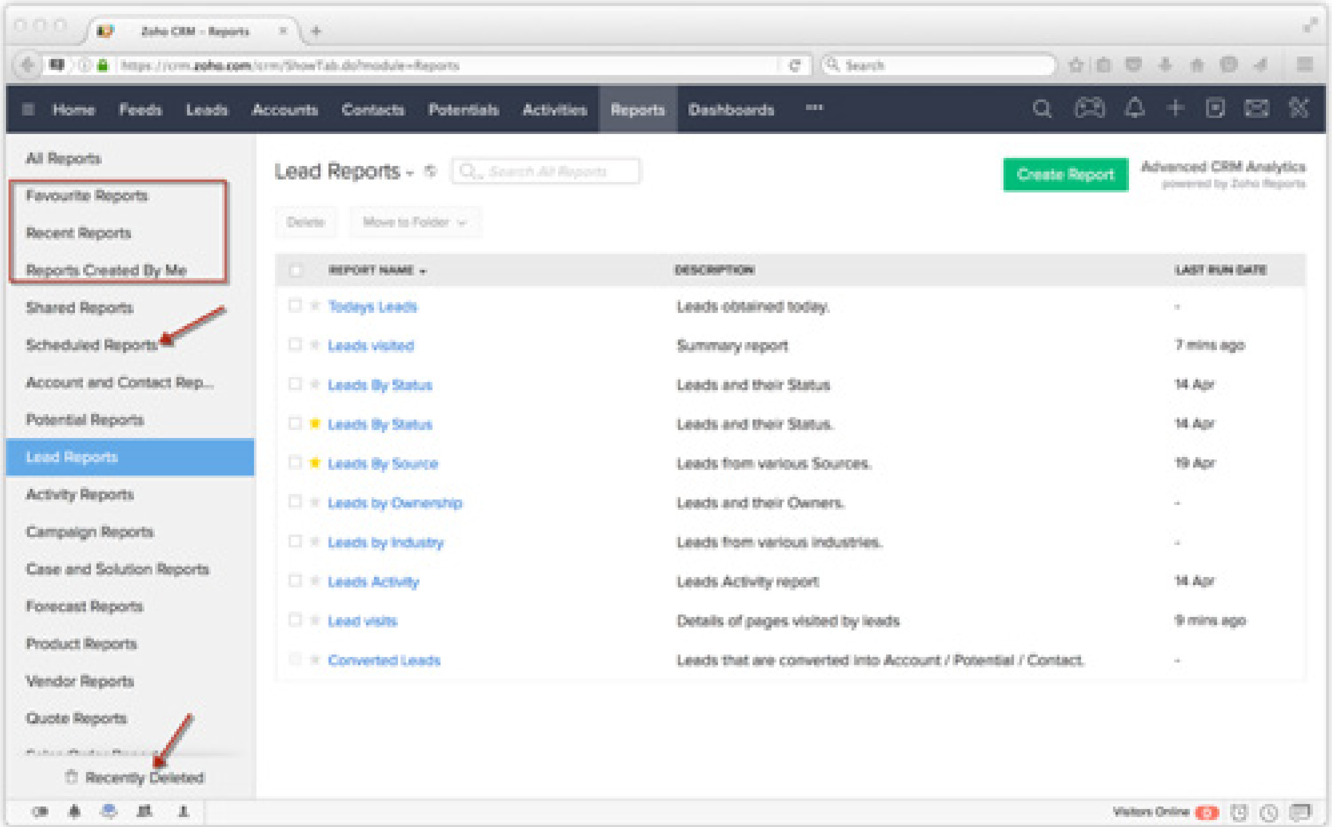
Reports - Now



What has Changed?

- The Reports module now has additional default folders such as Favorite Reports, Recent Reports, Reports Created By Me.
- The Create Report Folder and Report Scheduler buttons have been moved from the main screen to be a part of the report folders. Now create a report folder right when you create a report. Schedule a report by accessing the Scheduled Reports folder.
- Access deleted reports from the Recently Deleted reports section. [Learn More]

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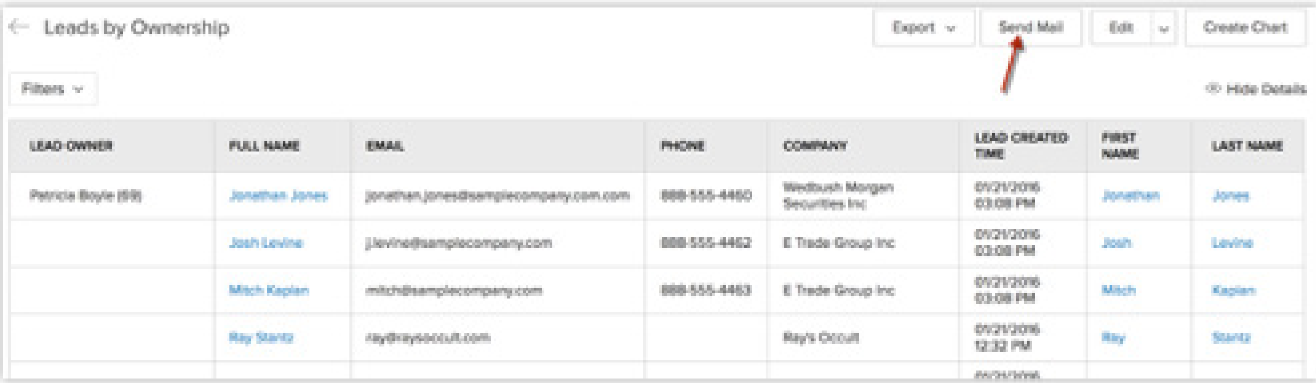
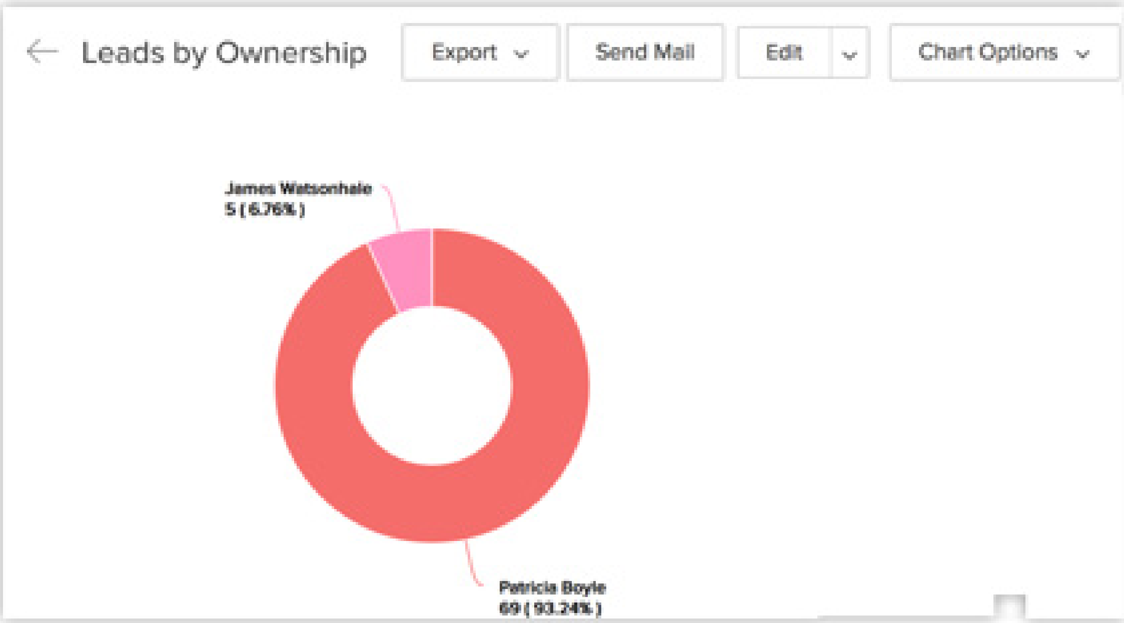
Send mails to users, groups or roles



Create charts from the reports



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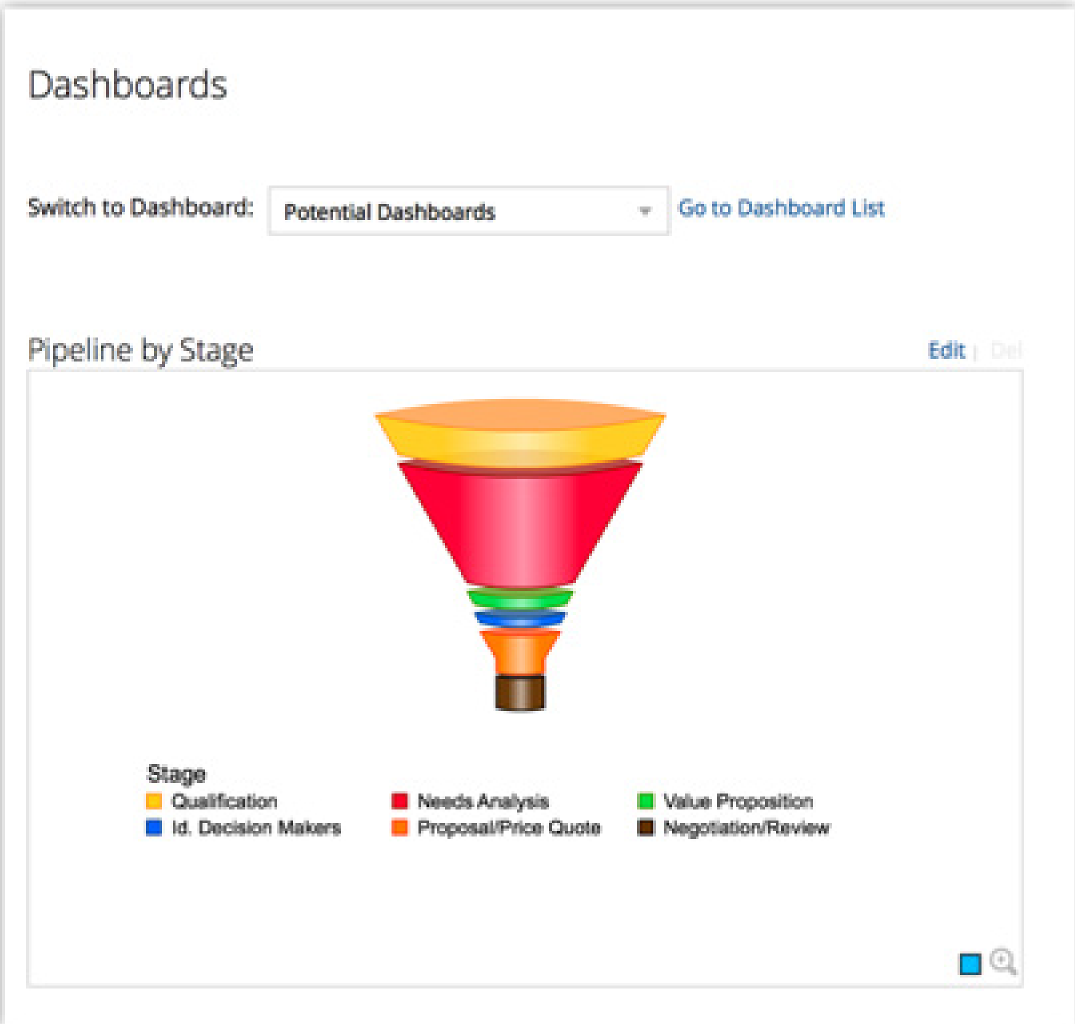
3. Dashboards

Visualize your sales metrics.

Dashboards in Zoho CRM help you get a snapshot of your organization's key metrics. You can easily visualize the patterns and trends in sales, marketing, support, and inventory related data.

Dashboards are created from reports. Dashboards in Zoho CRM 2016 come with a host of new folders and options.

Dashboards - Before



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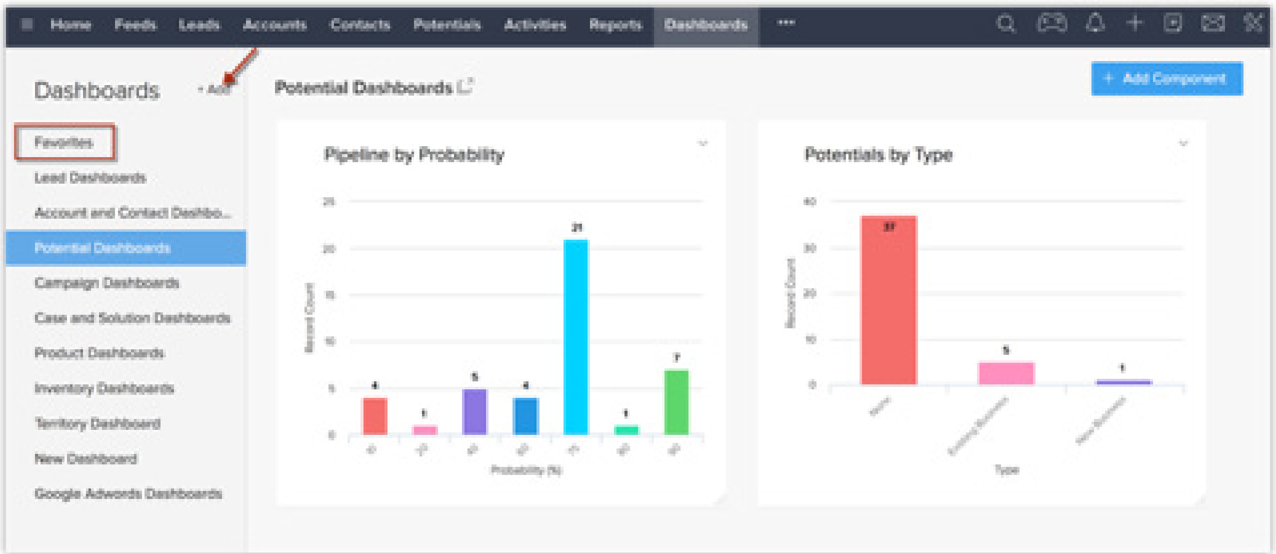
Dashboards - Now



What has Changed?

- Improved interface.
- Dashboards now have new default folders such as favorites.
- You can now have 10 components in Dashboards. Learn More

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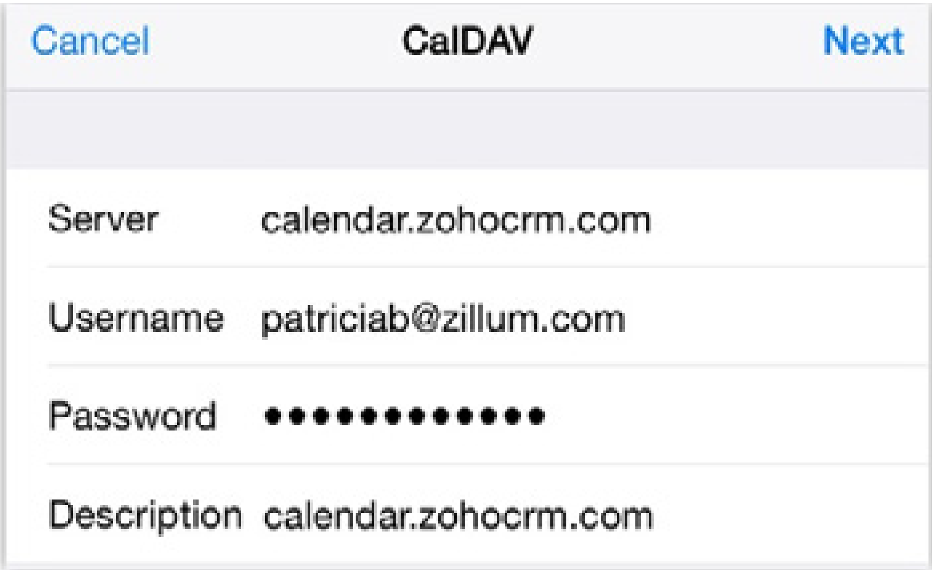
3. Be Productive

CalDav

All your events on one calendar.

Since you have your iPhone with you, why visit CRM to see what you've planned for the day? CalDav allows you to maintain one calendar for business and personal events, so you don't miss out on anything.

Once you configure CalDav in your Apple device, you can create, view, and reschedule CRM events from your native calendar. You can also view your calendar on a MacBook or iPad. Learn More



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Workflow Automation

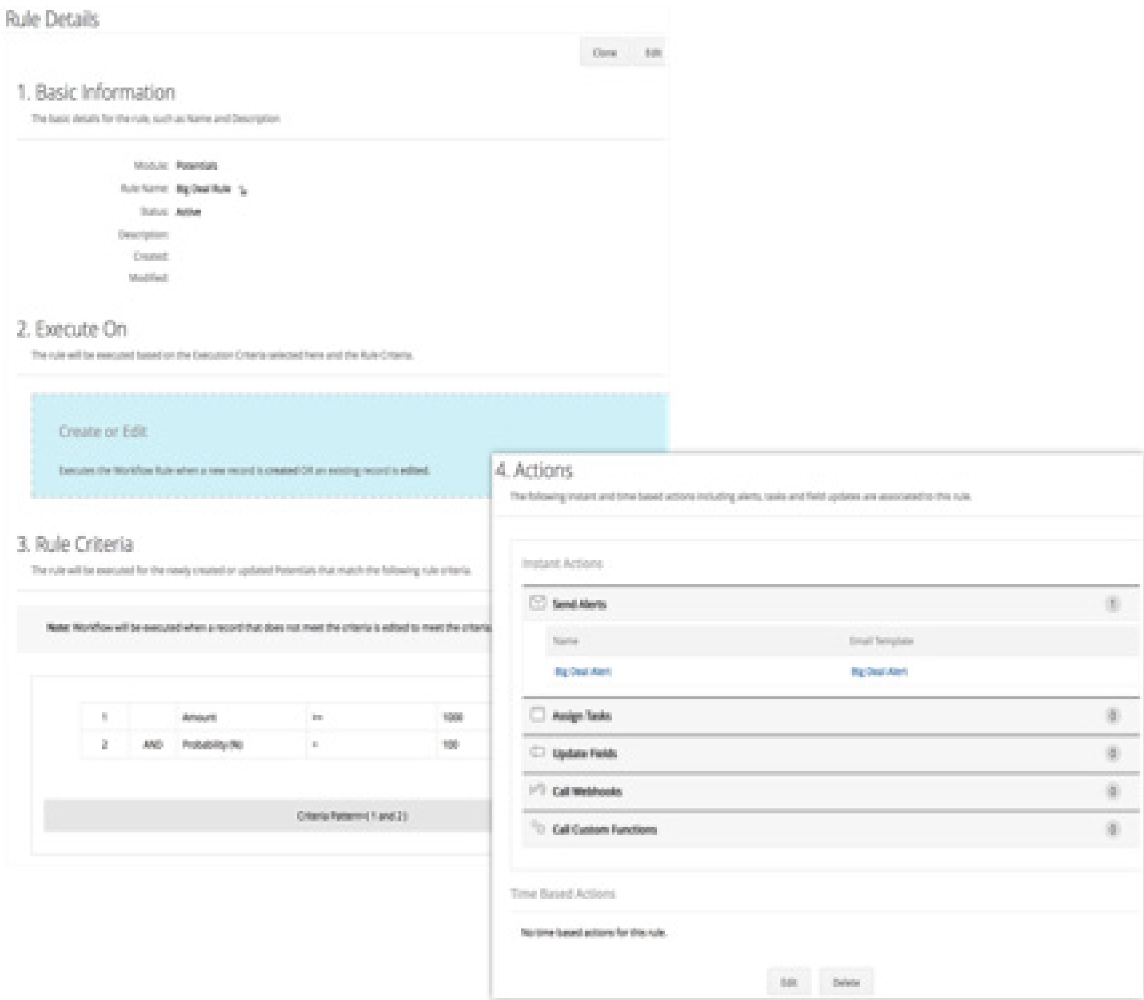
Flowchart-based workflows for easy automation.

Flowchart based workflows help you streamline your sales, marketing, and support processes. Use simple flowcharts to write rules that suit your unique business needs. Improve the efficiency and effectiveness of your sales team by eliminating redundancies and automating the mundane tasks.

Workflow rules in Zoho CRM 2016 now follow a simple, visually improved flow chart based design.

Workflow Rules - Before

Earlier, the components, Basic Information, Rule Trigger, Rule Criteria and Actions were presented in different sections.



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Workflow Rules - Now

What has Changed?

As you can see, the components of a workflow rule have been presented in a different design.

1. The rule trigger can be defined under WHEN
2. The rule criteria is now defined under WHICH RECORDS
3. Instant Actions or Scheduled Actions are associated to the rule. Learn More

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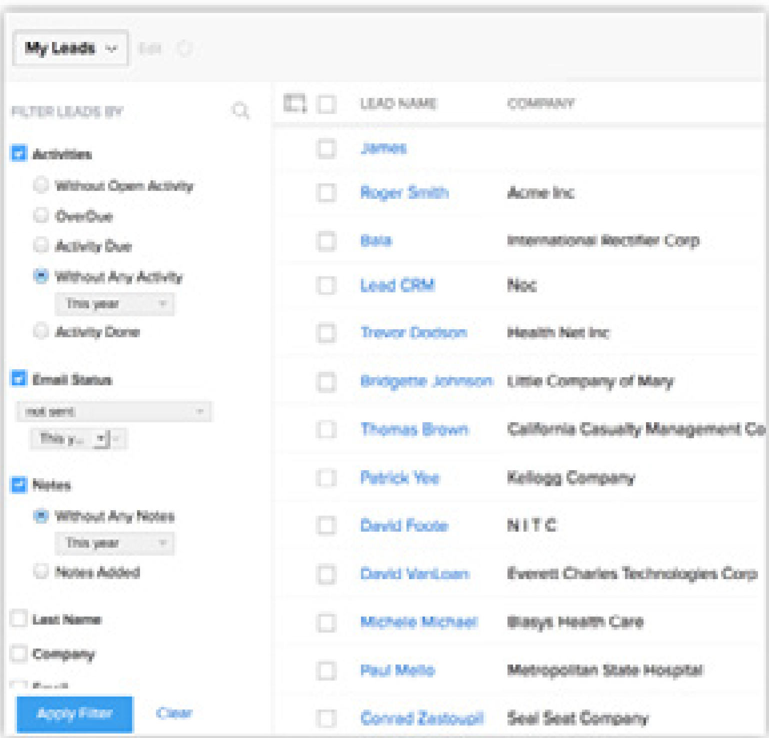
Advanced Filters

Get precise search results.

Advanced filters help salespeople find what they're looking for ten times faster than conventional search does. This means less time is spent on navigating the CRM, and more time on prospecting.

Choose from around 40 unique search parameters, in any combination of your choice and zero in on the ideal search result. Advanced Filter increases the relevance of results obtained by your search process, and takes away the burden of manually looking through entries.

With a regular filter, your search is based on field values - for example, all leads whose state is "California". This is pretty straightforward. While with advanced filters, you can run intelligent searches based on the activities associated to the records, such as leads "that have no open activity associated to them". Or "potentials without any notes for the last 6 months".



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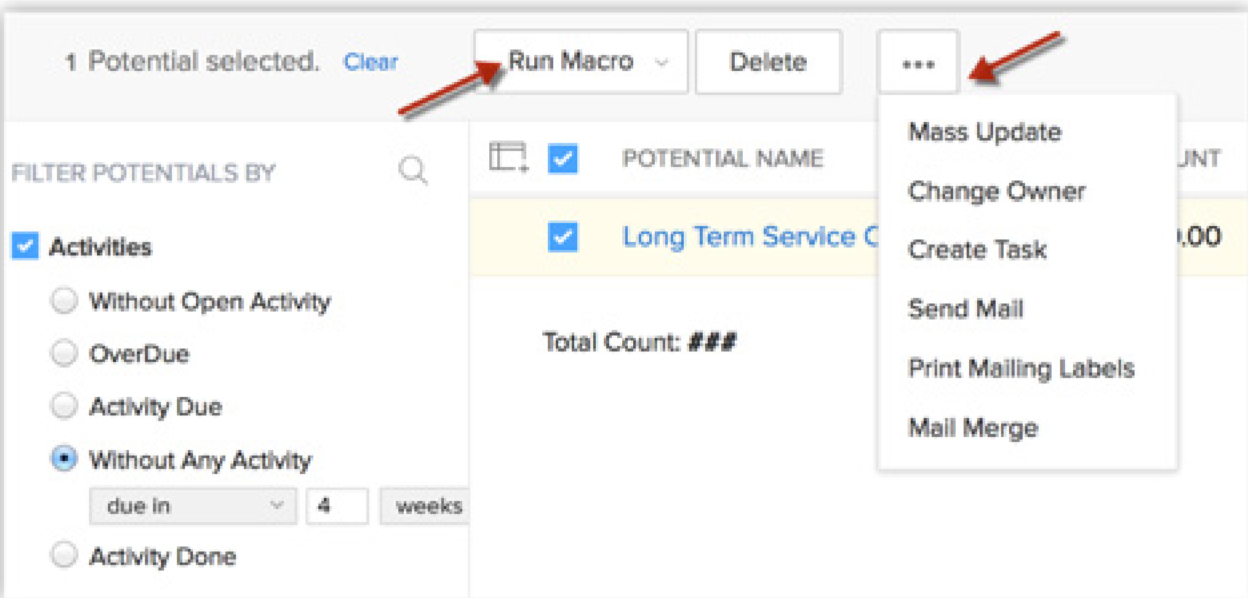
The screenshot above is an example of a search conducted using the advanced filters to narrow down on idle leads. Similarly, you can apply the advanced filter to records by using a combination of different criteria that meet your purpose. Some examples are as follows:

1. Potentials that are "closing this month" and have "overdue tasks".
2. Potentials that are "closing this month" and have no activities associated to them so far.
3. Contacts to whom emails were sent but they were not opened.

You can not only use the filters to search for records with the criteria applied, but also act upon them instantly.



You can run macros, delete, mass update records, and send email and so on as required directly from the list view.

[Learn More]

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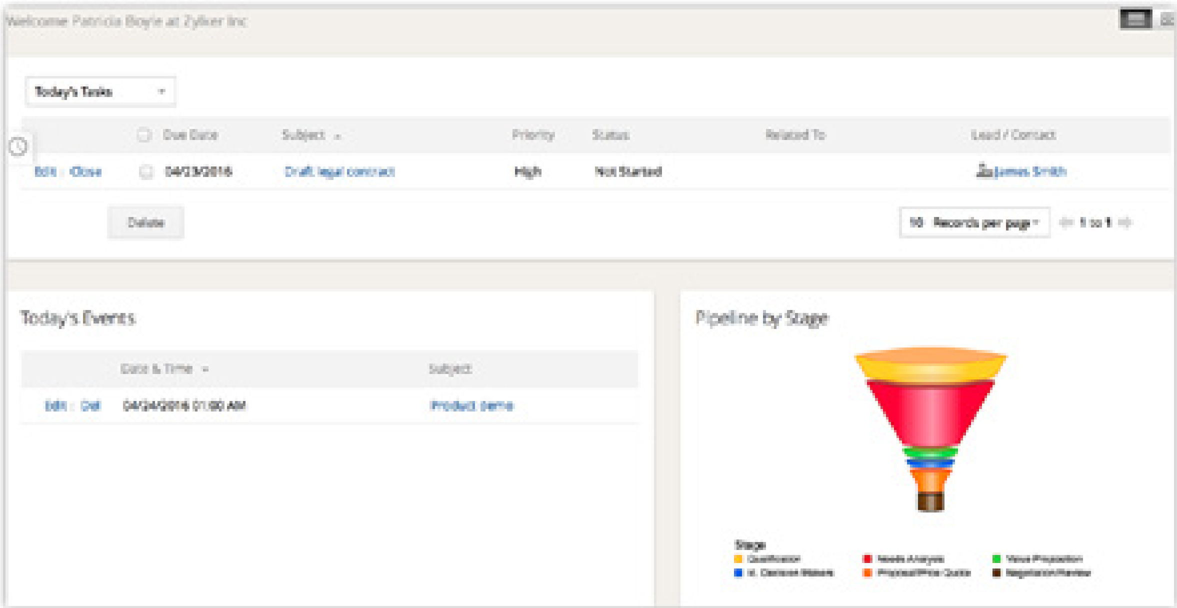
Zoho CRM Home

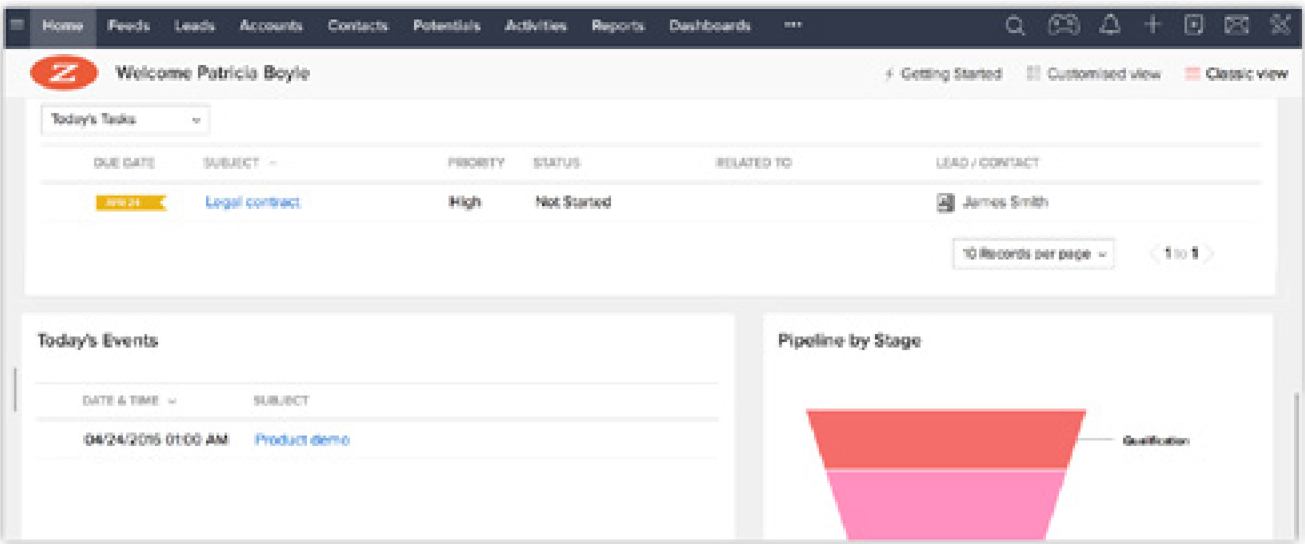
The Classic View - Before

The Classic View consists of 3 components by default – Tasks, Events and Pipeline by Stage. This view is unique to a user. With the Home tab set in the Classic View, a sales rep will be able to plan his/her day easily. Here is a snapshot of the Classic View in the previous UI.



The Classic View - Now

Here is a snapshot of the Classic View in Zoho CRM 2016.



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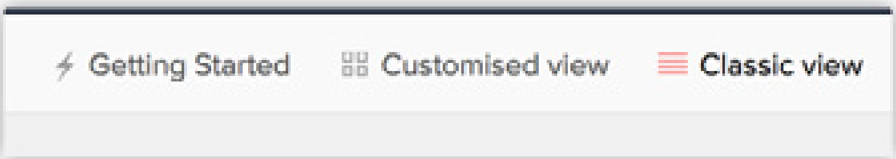
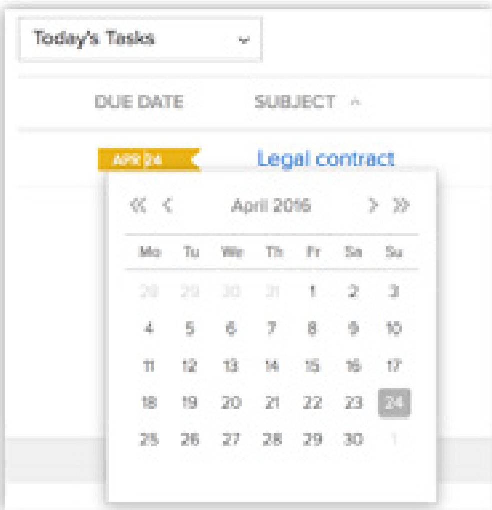
Earlier you had to switch between the Classic View and Customized View using the Views icon.

Now you can switch between the views by clicking on the Classic View and Customized View links on the Home screen.



Earlier, clicking on an activity from the Classic View took you to the Activities list view. It will now take you to the Activities CRM view.

In Zoho CRM 2016, you can now change the due date from the Classic View on the fly.



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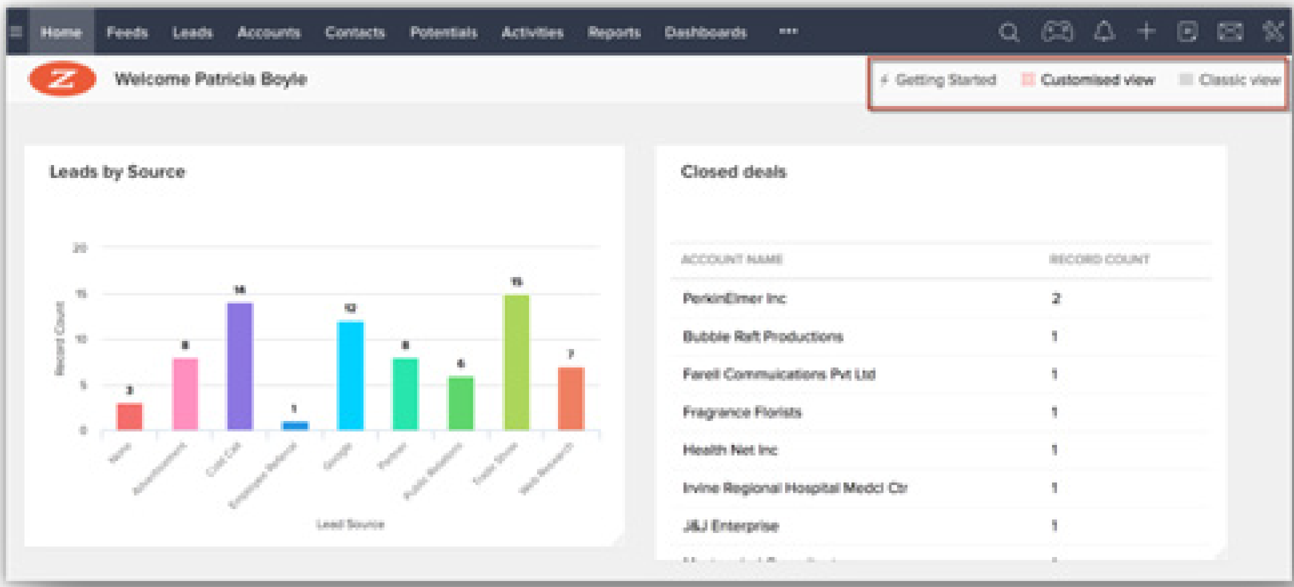
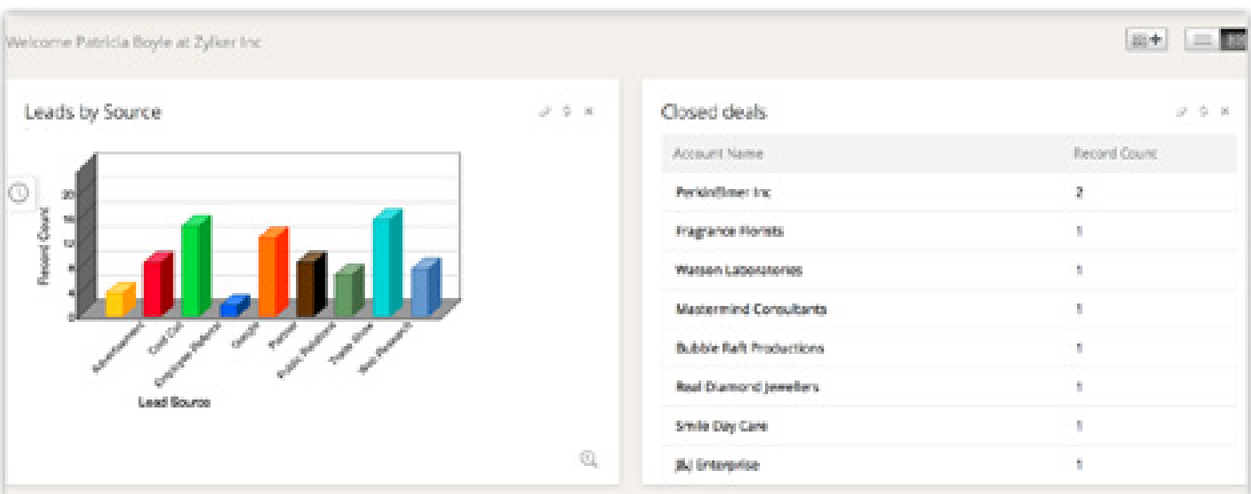
The Customized View – Before

The Customized View lets you add components from other modules such as Leads, Contacts, Dashboards etc and personalize your Home tab. Here is a snapshot of the Customized View in the Old UI.



The Customized View – Now

The Customized View of Zoho CRM 2016 lets you add up to 10 components. You can also resize them and arrange them on the screen to personalize your Home tab.



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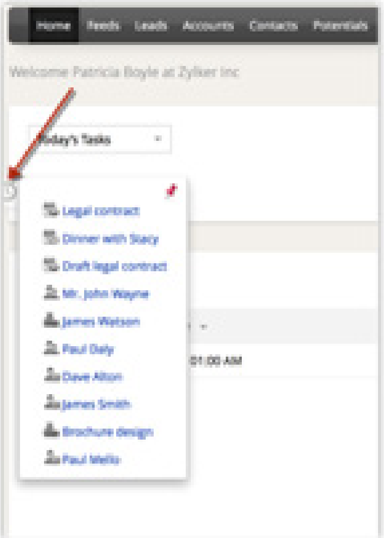
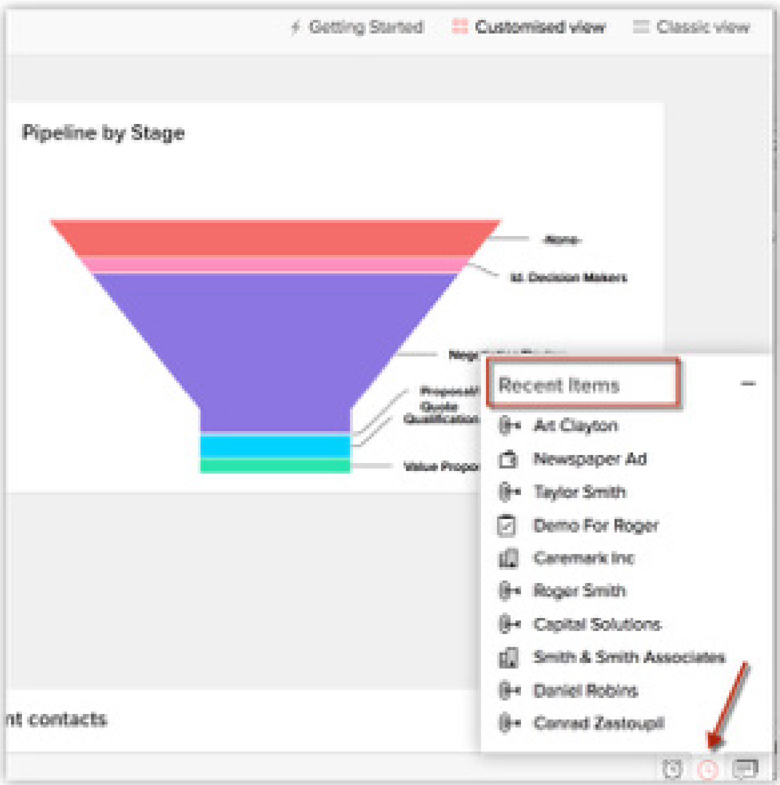
Recent Items - Before

Earlier, the Recent Items icon was found on the left hand corner of the Zoho CRM screen. It displayed 10 recent items.



Recent items - Now

In Zoho CRM 2016, you can access the Recent Items from the bottom right corner of the screen. The pop up window now displays 20 recent items.



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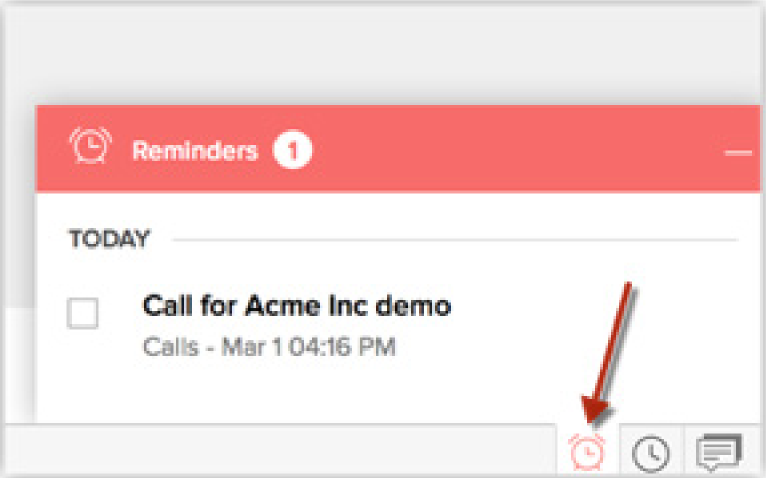

Besides the Recent Items icon, you can also access Reminders and Feedback icons from the bottom right corner of the screen.

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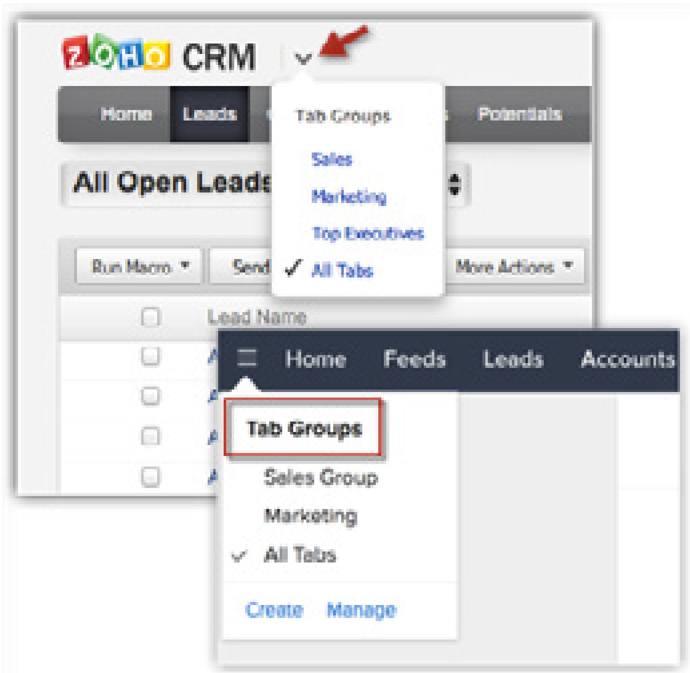
Tab groups – Before and now

Earlier, Tab Groups was found next to the Zoho CRM logo. Now it is part of the Modules menu bar. You can also create and manage Tab Groups right from the drop down in Zoho CRM 2016.



In Zoho CRM 2016, you will now be able to see your company logo only on the Home page and not on the other pages. This is to give you more space on your CRM screens to work with. Learn More

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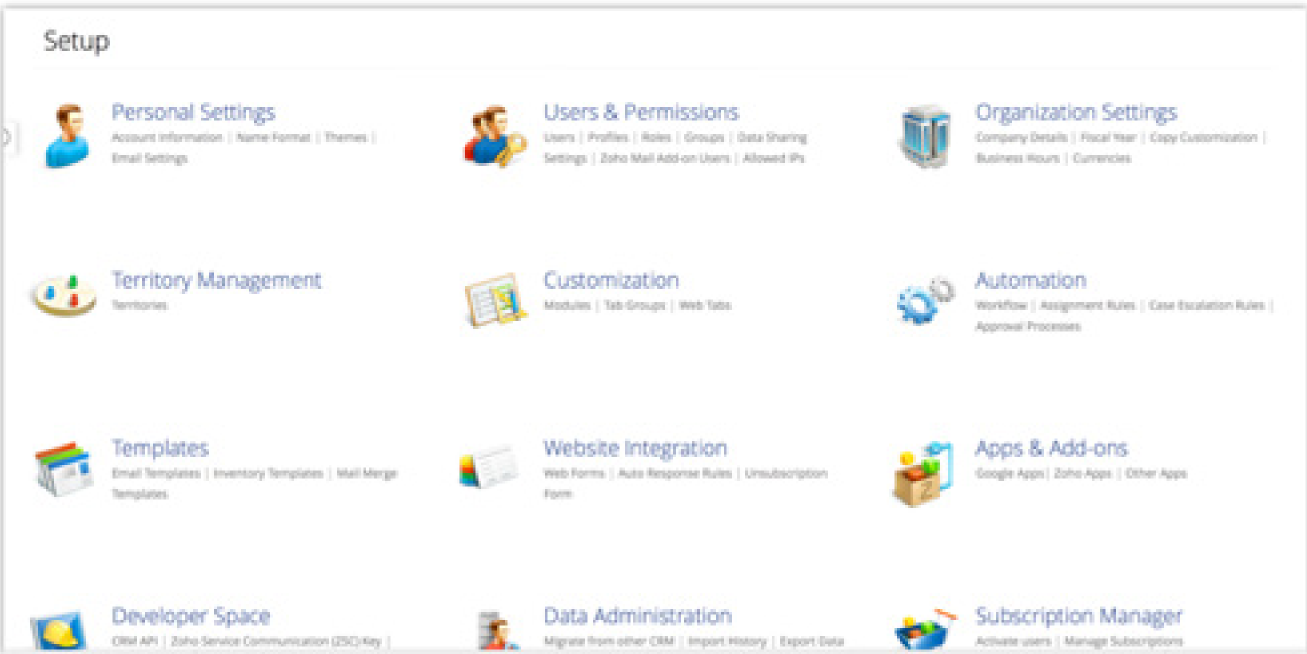
Setup

The Setup screen of Zoho CRM has now been improved from the perspective of design as well as usability. You now have the various CRM settings better organized on the Setup screen. You also have a Search option to quickly fetch the setting you are looking for.

Earlier, you could access the Setup page by clicking on the Setup link in Zoho CRM. Now, to access the Setup page, log in to your Zoho CRM account and click (the Settings icon) > Setup. 

Setup - Before



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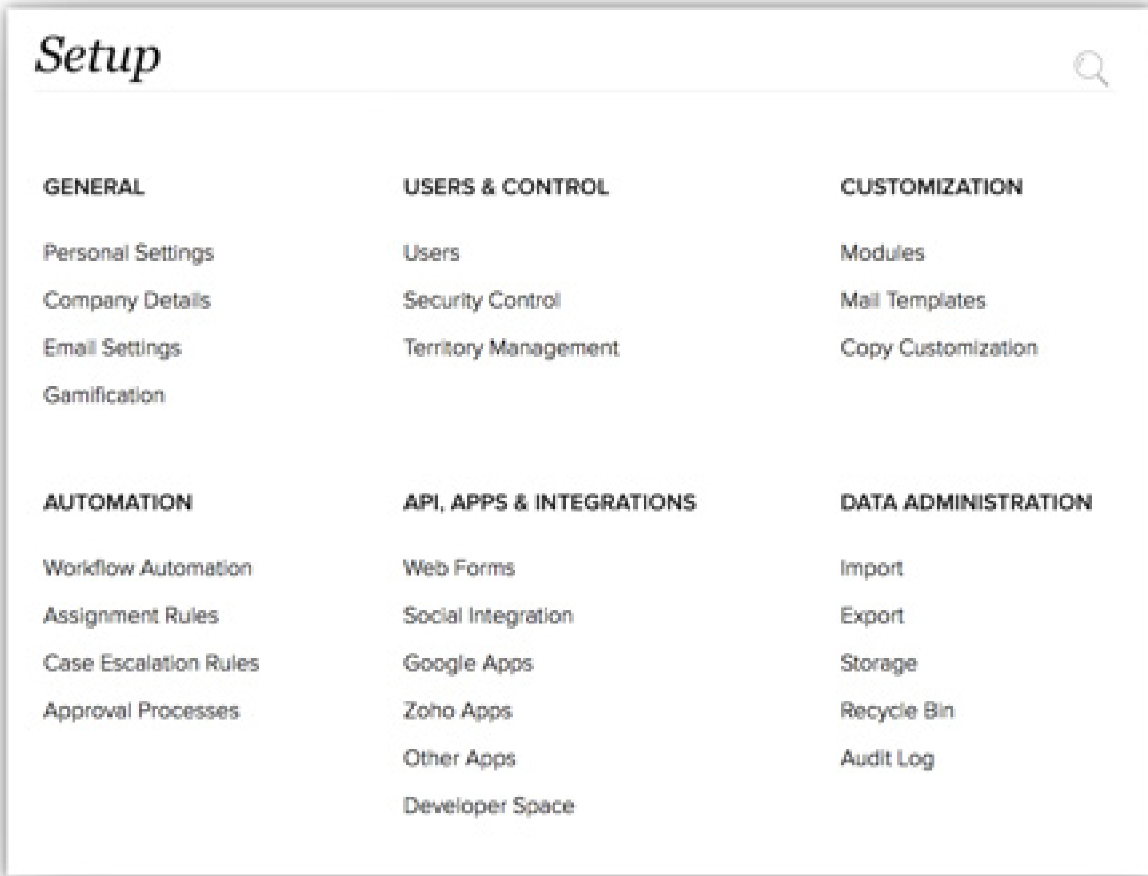
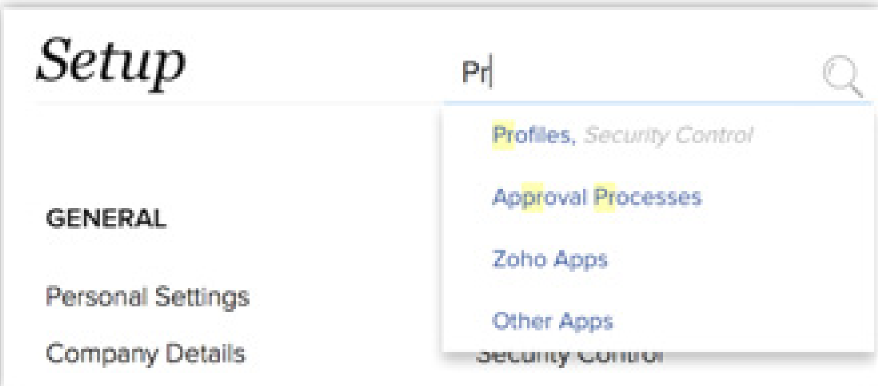
Setup - Now



Predictive Search

The Search tool autosuggests results as you enter a keyword to find a particular setting. [Learn More]



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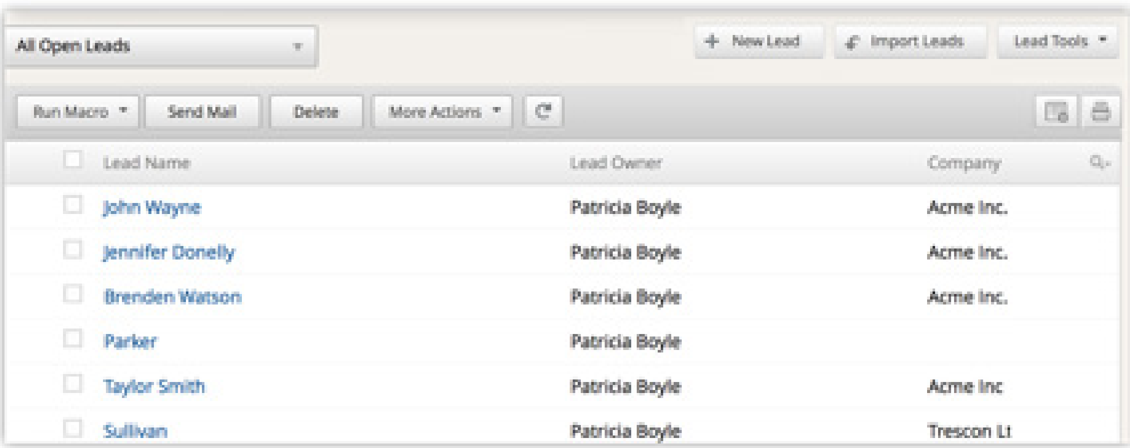
List Views

Zoho CRM comes with different views of displaying data to help your sales team act quickly and decisively. Each view is designed for a different way of working. Use them to target customers geographically, edit their records in bulk, and filter your data.

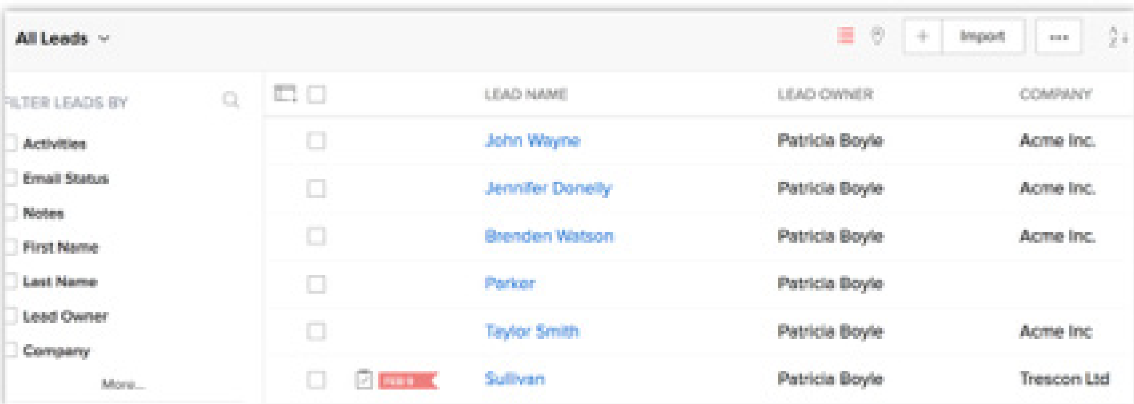
Zoho CRM 2016 presents you with 3 views for a list of records in a module. They are as follows:

- List View
- CRM View
- Zoho Sheet View

List View - Before



List View - Now



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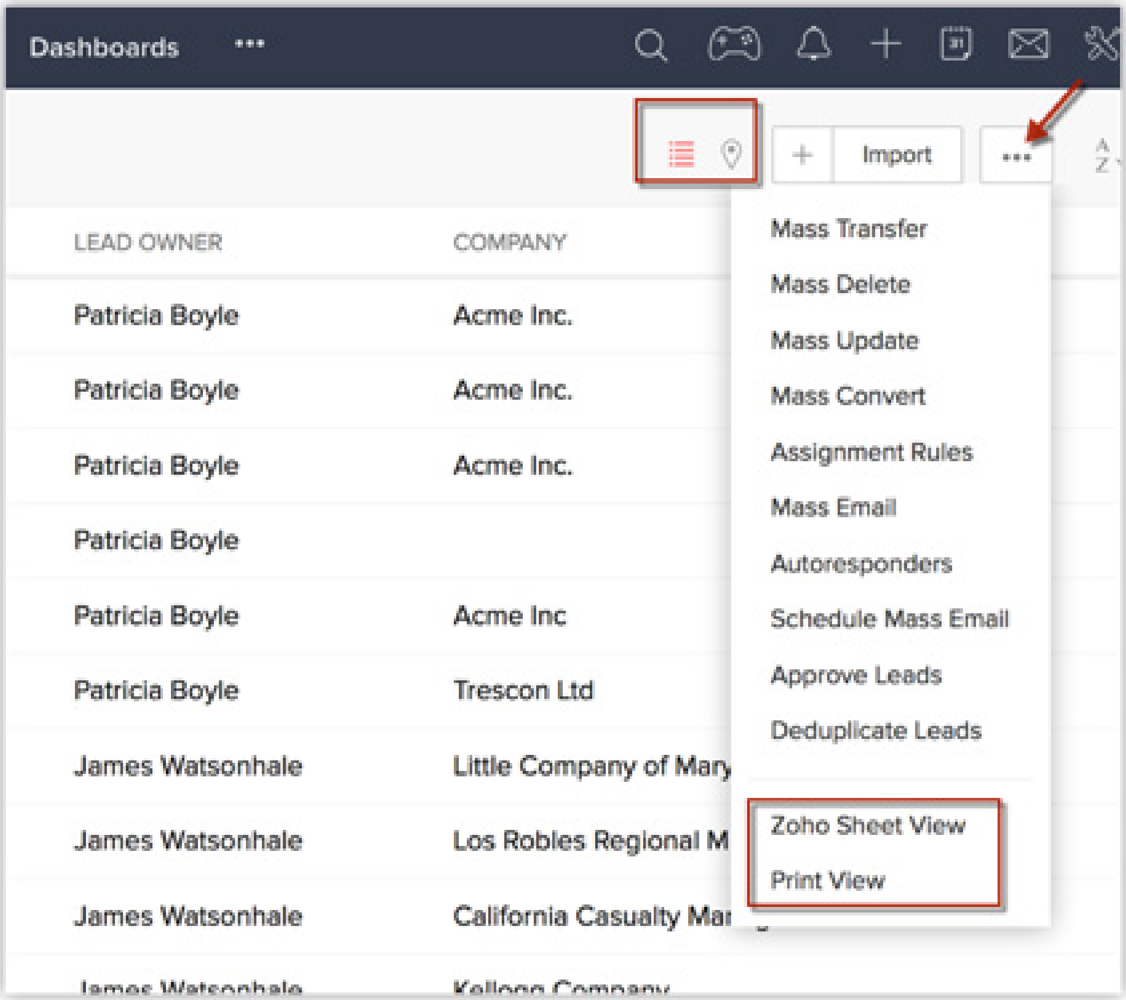
What has Changed?

The List View options with the exception of Add New (+) and Import have been moved inside More options.



- You will be able to see the due date of a task associated to a record in the Module list view.
- The List View of modules across Zoho CRM now present a new set of advanced filters. More information on advanced filters is presented in a separate section.
- Toggle between the List View and Map View by clicking on the corresponding View icons.

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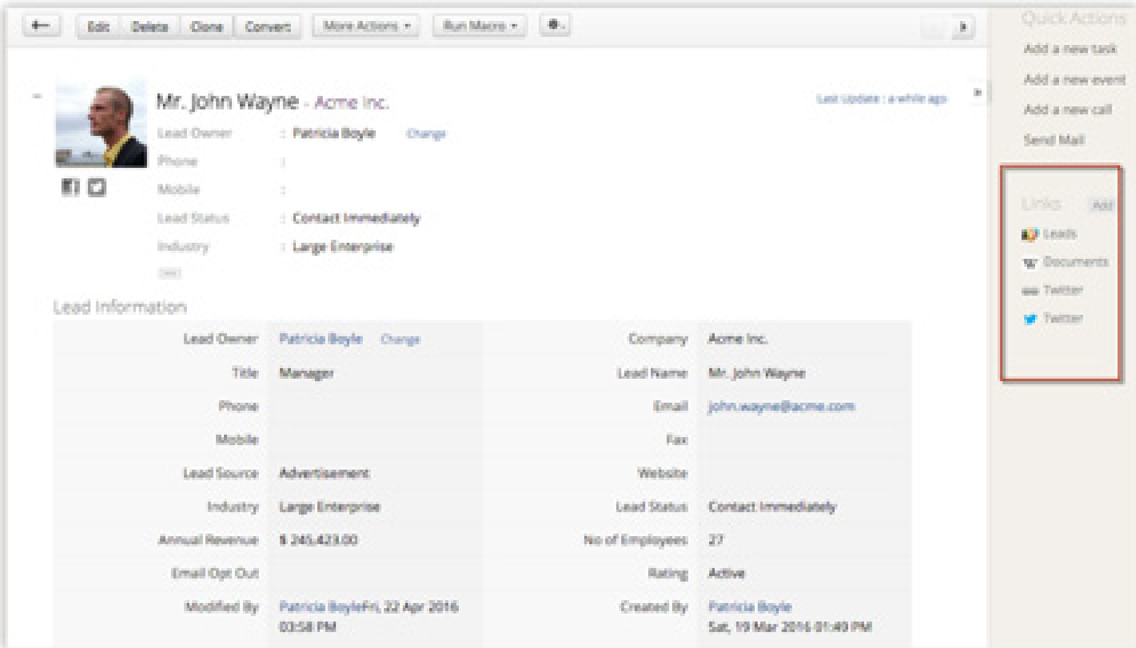
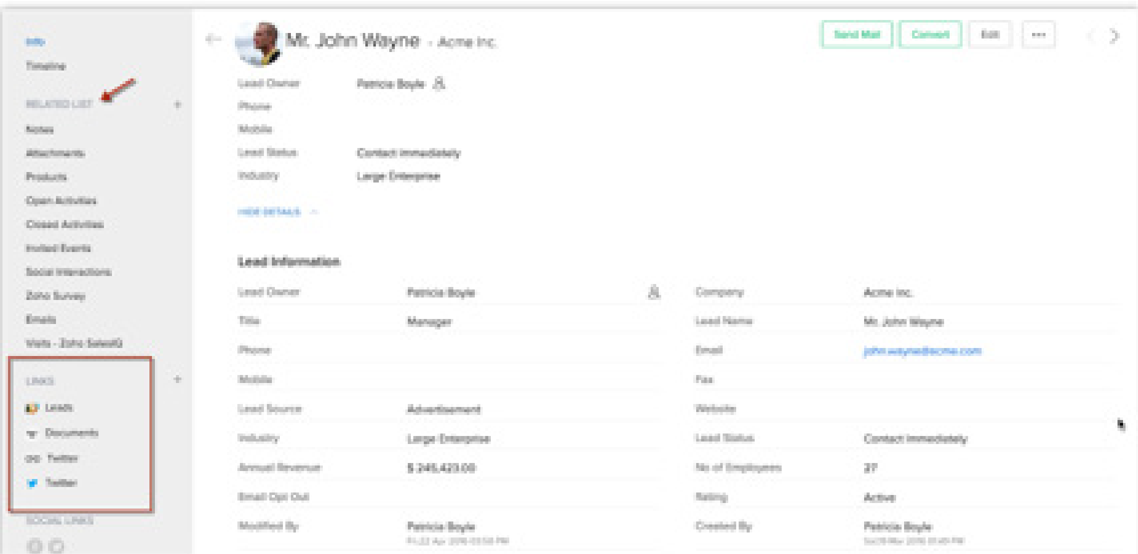
Record’s Details Page

The record details page of all modules has been redesigned for better user experience.

Lead’s detail page - Before



Lead’s detail page - Now



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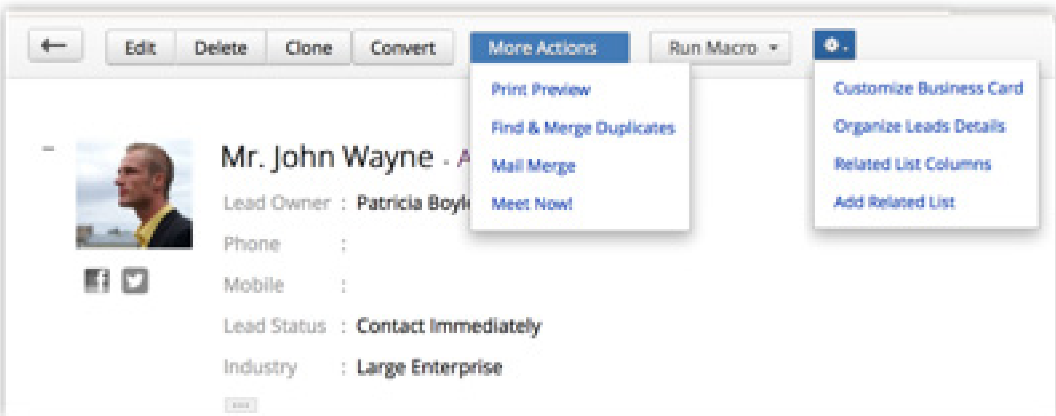
What has Changed?

- Related lists can be accessed from the Related List links available on the left.
- Quick links were available on the right panel of the details page. Now they are available on the bottom left under the LINKS section.
- SEND MAIL and CONVERT are available as clear call-to-action buttons on the Lead's details page. Further options that were previously available under More Actions and Settings are now available under the MORE icon.

More actions on the Lead's details page – Before



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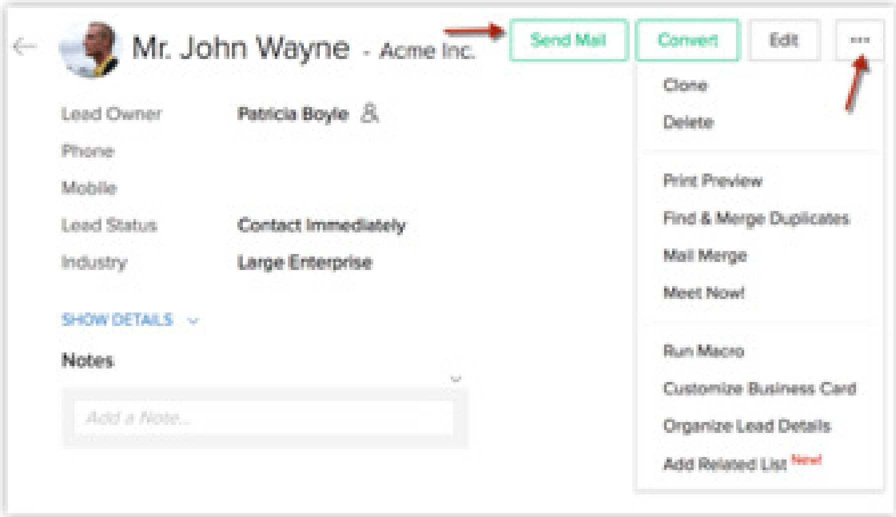
More actions on the Lead's details page – Now



You can see the same changes implemented in the record's details page of other modules as well. Following are snapshots of record details page from Contacts, Accounts and Potentials.

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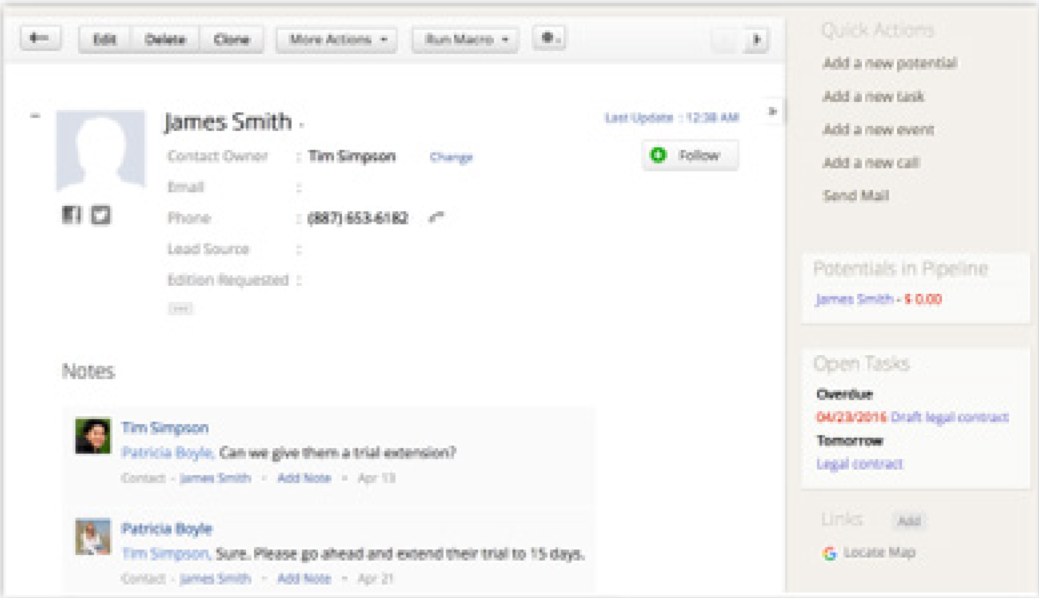
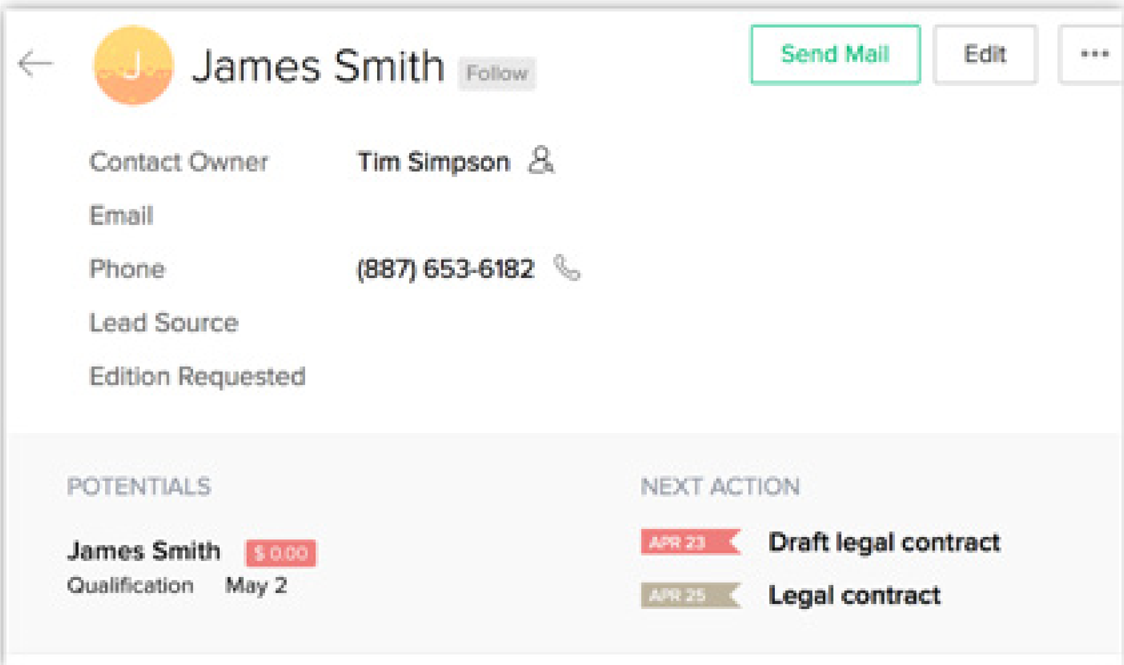
Contact's detail page - Before



Contact's detail page – Now



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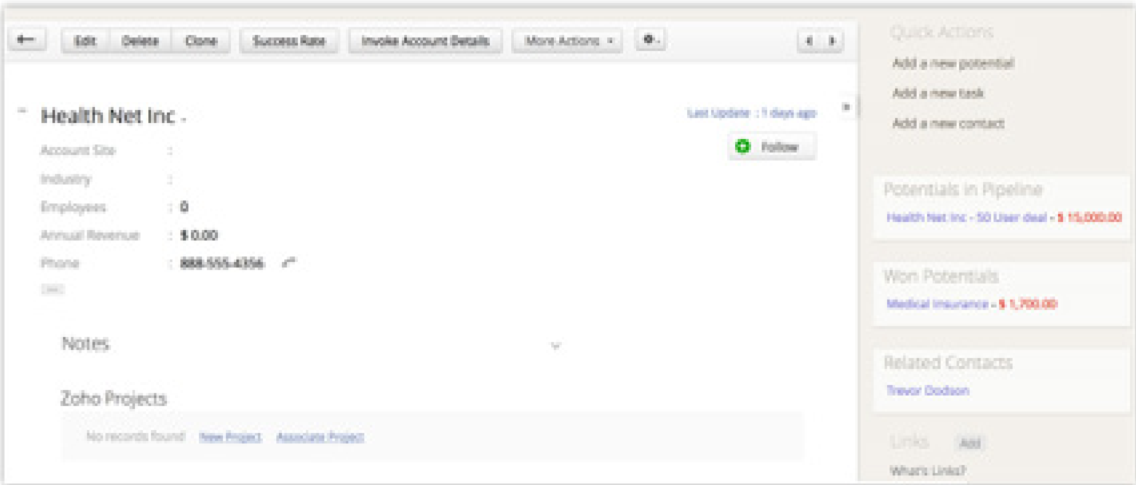
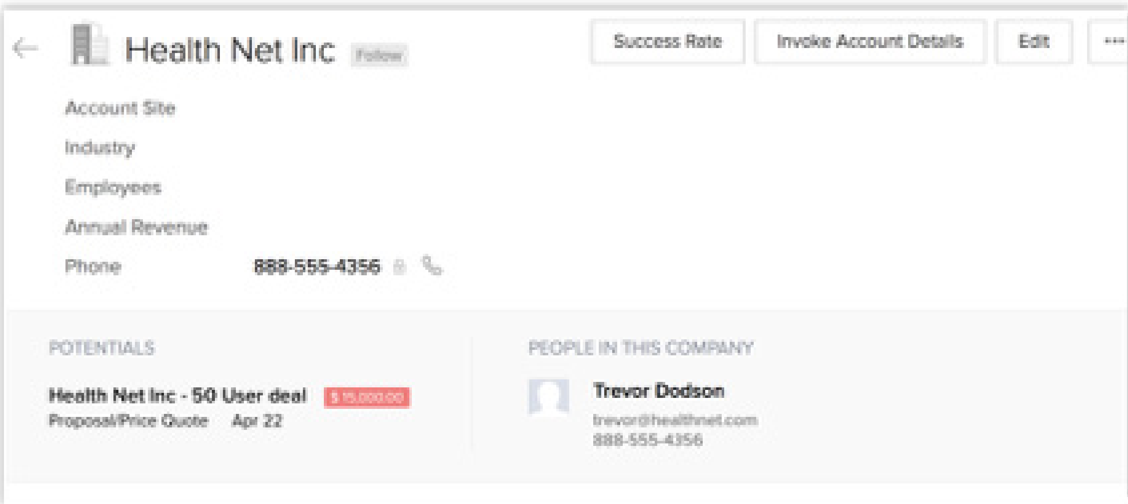
Account’s detail page – Before



Account’s detail page - Now



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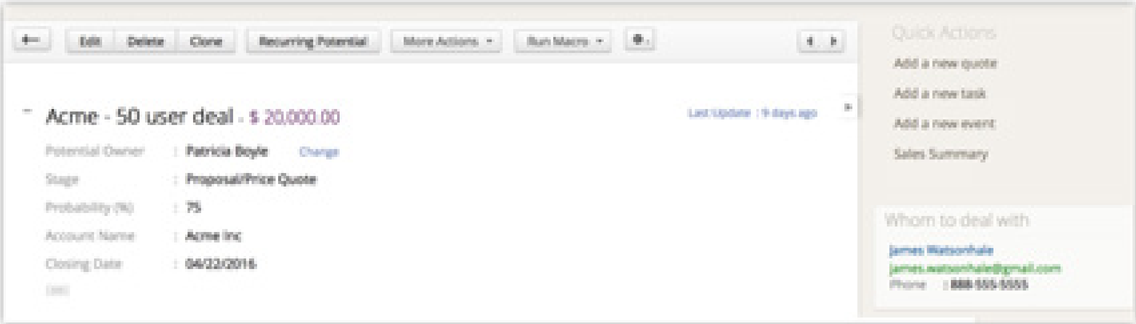
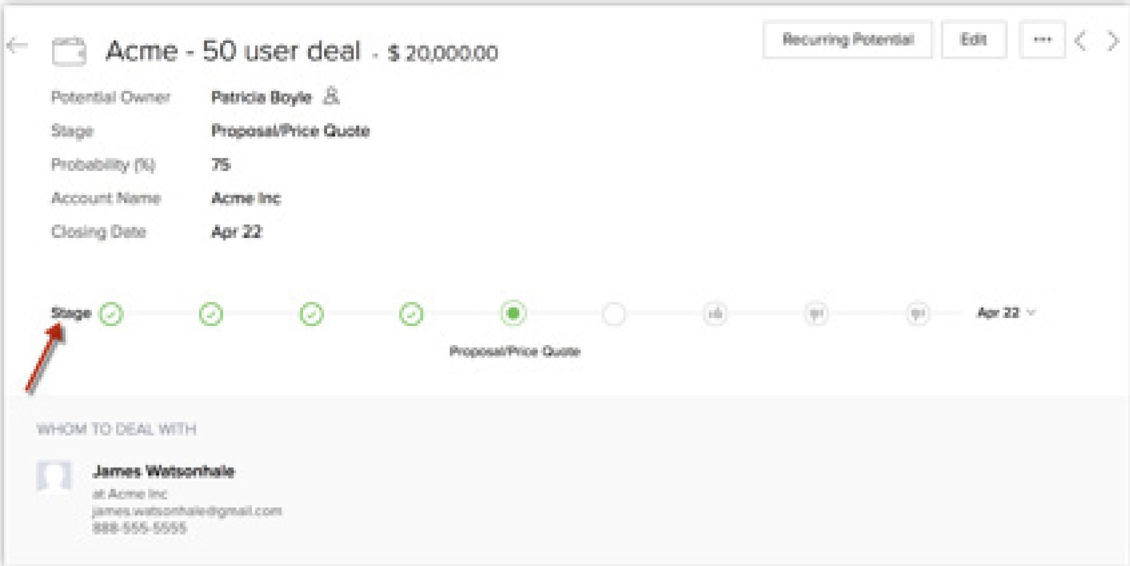
Potential's detail page - Before



Potential's detail page - Now



Did you know?

You can now change the stage of a potential on the fly from the Potential's details page without having to edit the record. Simply click on the desired stage from the Quick Stage-Update section.The stage is updated instantly. Learn More

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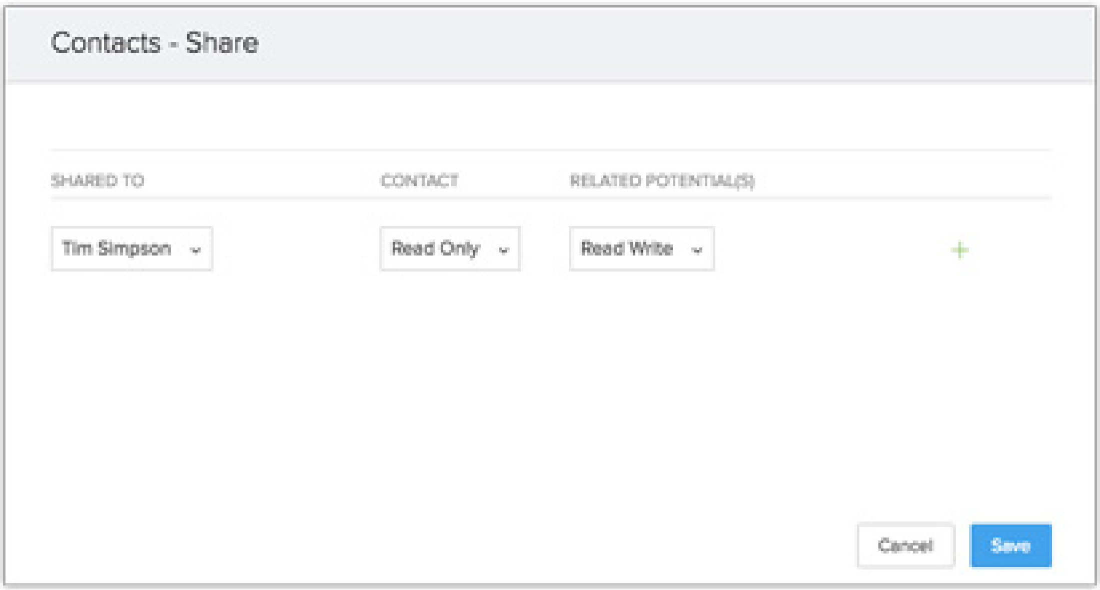
4. Security and access privileges.

Record-level Sharing

Share Individual records with colleagues.

Share records to get your sales reps working together on big deals and avoid the confusion caused by duplicating a customer's information in multiple places. Keep your data secure by choosing which customer information you'd like to share.

Record level sharing is useful when multiple sales representatives collaborate to close a deal. You can share contacts, accounts, and potentials with peers and also define whether you want to give them a read only or read/write access. When you're sharing a contact information with your colleague, you can also share the associated potentials.



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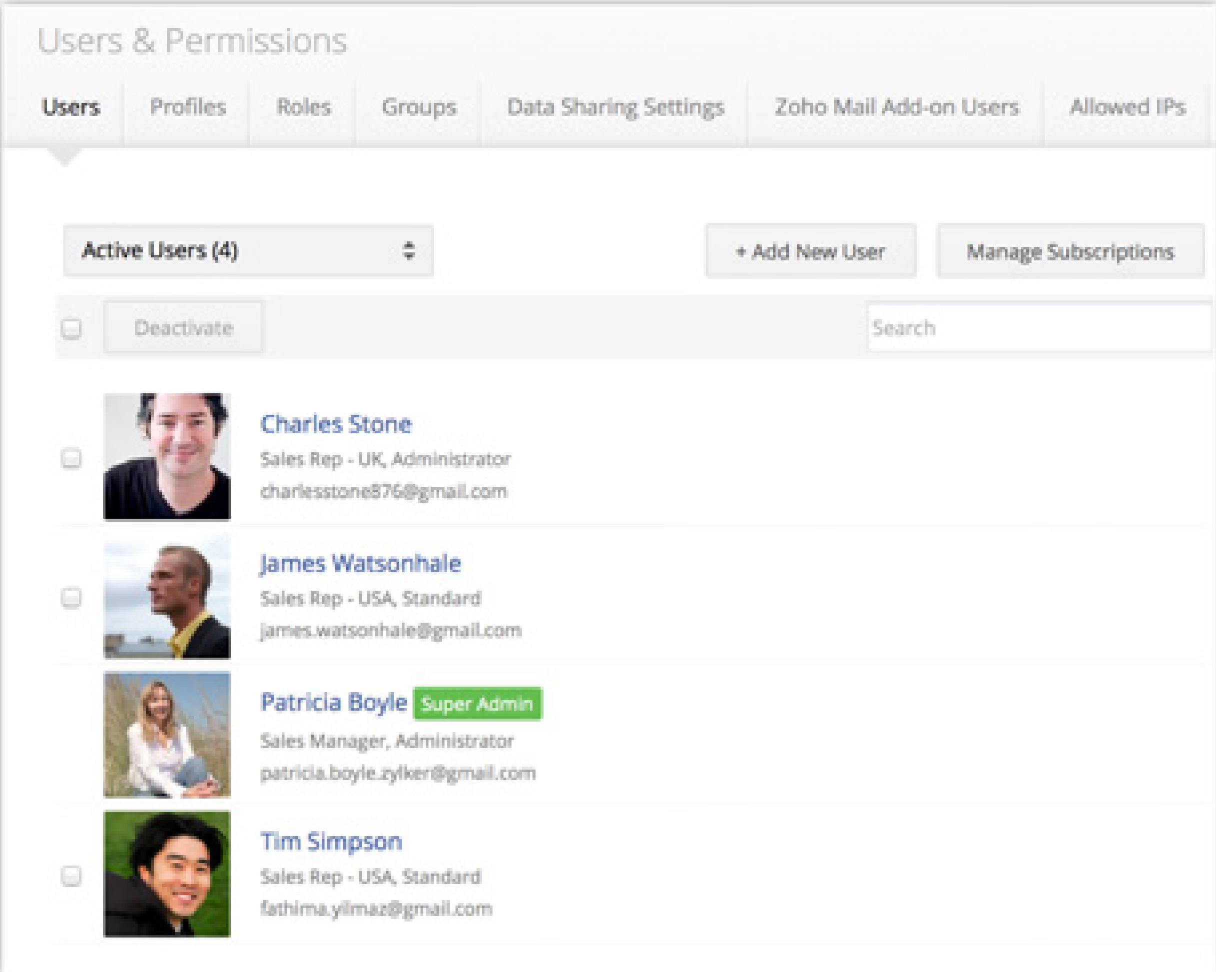
Users and Control

The Users & Permissions section has now been renamed as Users & Control in Zoho CRM 2016.

Users & Control – Old UI



Earlier, all the permissions and security based settings were grouped under Users & Permissions. There were no divisions for user-based settings and security-based settings. Learn More

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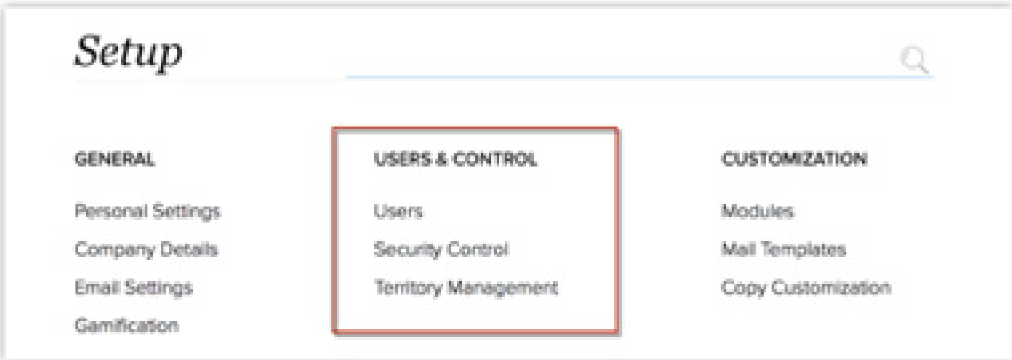
Users & Control – New UI

In Zoho CRM 2016, the Users & Permissions section has been organized better under Users & Control, which has 3 sections: Users, Security Control and Territory Management.



Earlier, Territory Management was a separate section under Setup. Since it is also a data-sharing based setting, Territory management has been grouped under Users & Control.

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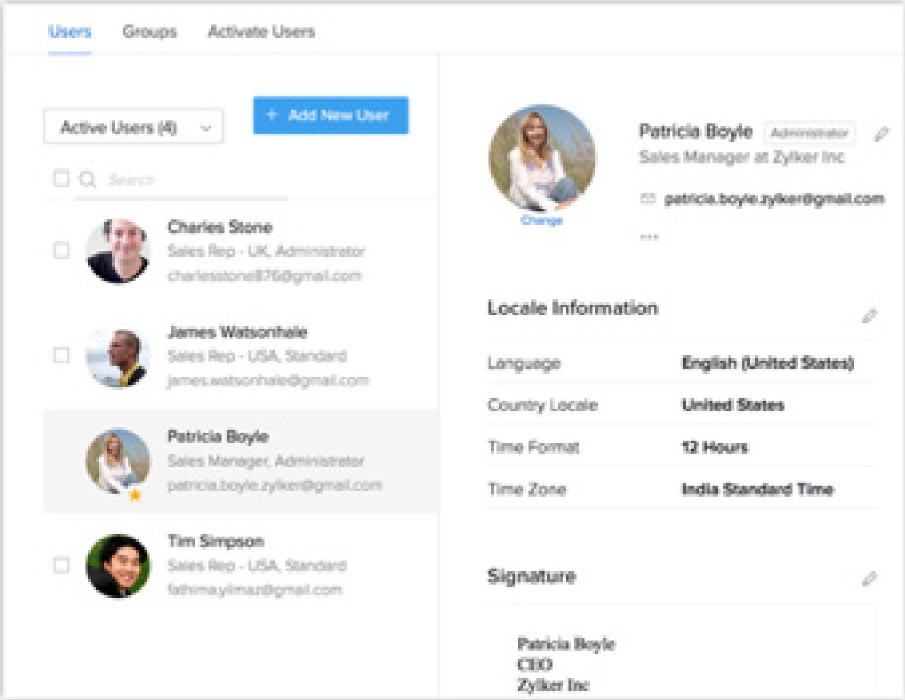
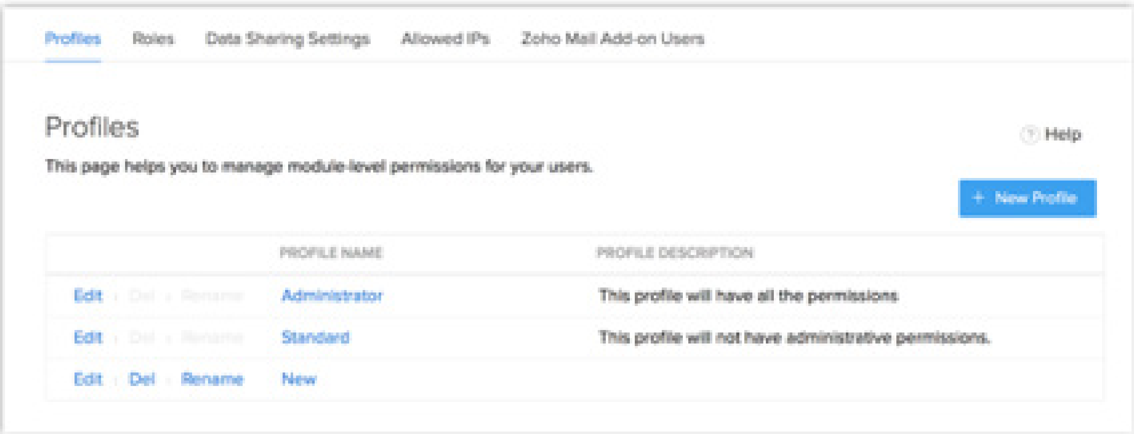
Users



Security Control



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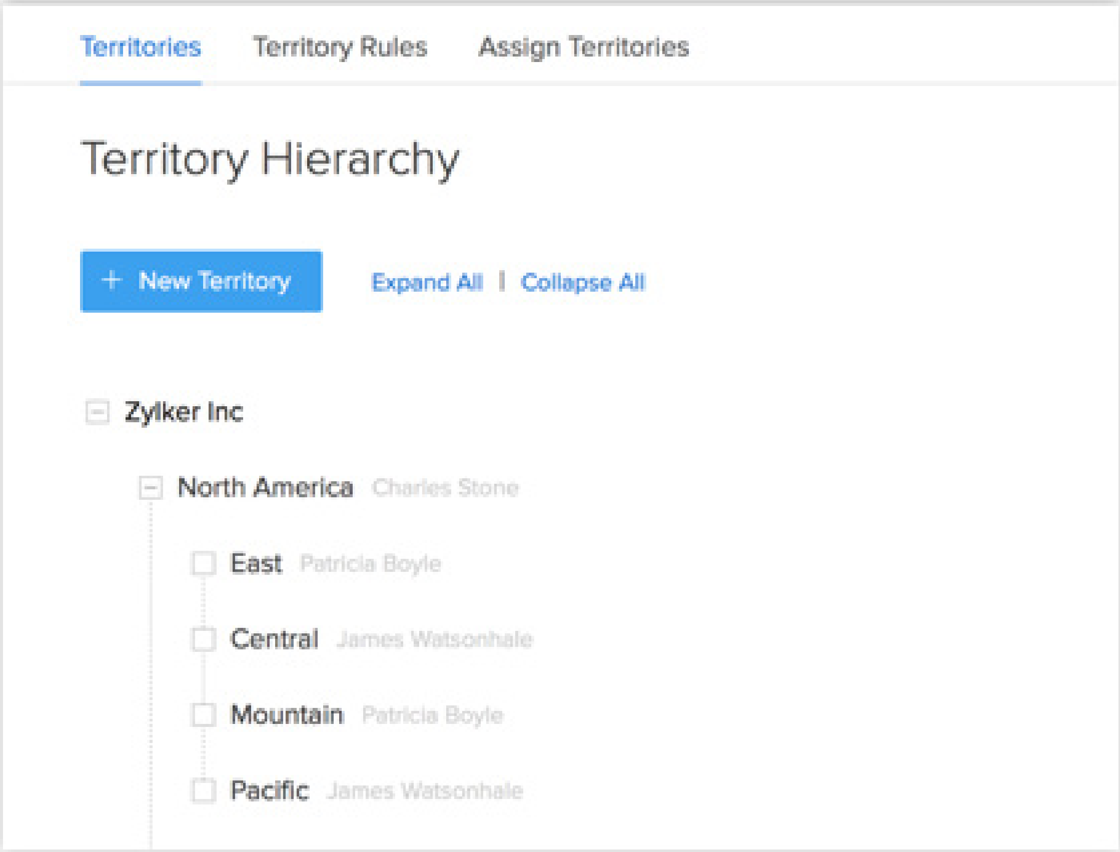
Territory Management



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Contact Us

We are positive that you will like the additional features and improved interface of Zoho CRM 2016. Take a look at these changes mentioned and let us know your honest feedback. Write to us at support@zohocrm.com for questions, comments and clarifications.

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