



ZOHO CRM
**TRAINING
AGENDA**

ZOHO CRM TRAINING AGENDA

COURSE 1:

Getting Started With Zoho CRM (For Admins)

- Lecture 1 - Course Overview
- Lecture 2 - Setting Up Account Information
- Lecture 3 - Adding Users and Security related permissions
- Lecture 4 - Customizing Your Zoho CRM Account
- Lecture 5 - Implementing Automation
- Lecture 6 - Migrating Data to Zoho CRM
- Lecture 7 - Setting Up Telephony and Email Integrations
- Lecture 8 - Deriving sales insights with CRM Analytics

Getting Started With Zoho CRM (For Admins)

Lecture 1: [Course Overview](#)

This lecture gives you an overview of the entire course, covering all that you need to know as an administrator for your Zoho CRM account. Your key takeaways from this course include:

- Setting up your account information
- Adding users and security permissions
- Customizing your Zoho CRM account
- Implementing automation
- Migrating Data to Zoho CRM
- Setting up telephony and email integration
- Deriving sales insights with CRM analytics

Lecture 2: [Setting Up Account Information](#)

This lecture covers the basics of setting up your Zoho CRM account. Learn how to get started with Zoho CRM by setting up your:

- Company information
- Time zone
- Business hours and more...

Lecture 3: **Adding Users and Security related permissions**

Defining user permissions in CRM based on their roles in your company is very important, given that crucial data is involved. In this lecture we'll go deeper into users and security in Zoho CRM and specifically look at:

- Adding users to Zoho CRM
- Associating profiles to users
- Creating roles
- Managing user permissions
- Setting up territories

Lecture 4: **Customizing Your Zoho CRM Account**

Apart from a predefined set of modules, fields, layouts, and email templates, Zoho CRM comes with an ability to customize it to suit your specific business needs. This lecture will take you through:

- An overview of major customization settings in Zoho CRM
- Module and Home Page customization

Lecture 5: **Implementing Automation**

Automation is simply the process of programming a machine or a piece of software to complete an action or a set of actions automatically. In this lecture we will explain automation with an example and specifically look at:

- What is automation
- Why you need automation
- How you can implement automation in Zoho CRM with web forms; workflow, assignment, and scoring rules, and Blueprint

Lecture 6: **Migrating Data to Zoho CRM**

When you decide to switch to Zoho CRM, migrating your existing business data to the new system can be very challenging for some. Learn best practices to migrate your data into Zoho CRM and how you can:

- Create records manually
- Do a bulk import of data
- Migrate data via API
- Deal with duplicate records

Lecture 7: **Setting Up Telephony and Email Integrations**

Telephony and email are the two most important platforms you use on a daily basis for your business communication. To ensure a seamless flow of data, it's important to configure both inside your Zoho CRM account during the setup process. Learn how you can set up:

- Telephony integration via Zoho PhoneBridge
- Email integration

Lecture 8: **Deriving sales insights with CRM Analytics**

Reports and Dashboards form an integral part of CRM, giving you real-time insights on your organization's key metrics. In this lecture we will walk you through the different types of reports you can create in Zoho CRM and also look at:

- How to create custom reports
- How to export reports
- How to create and use dashboards
- How to use advanced filters

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COURSE 2:

Getting Started With Zoho CRM (For Users)

- Lecture 1 - Course Overview
- Lecture 2 - Setting Up User Profile
- Lecture 3 - Zoho CRM Screen Tour
- Lecture 4 - Setting Up Your Email Account
- Lecture 5 - Sales Process in Zoho CRM
- Lecture 6 - Deriving sales insights with CRM Analytics
- Lecture 7 - Resources

Getting Started With Zoho CRM (For Users)

Lecture 1: [Course Overview](#)

This lecture gives you an overview of the entire course, covering all that you need to know as a Zoho CRM user. Your key takeaways from this course include:

- Setting up UserProfile
- A Zoho CRM screen tour
- Setting up your email account
- Sales Process in Zoho CRM
- CRM analytics
- Resources

Lecture 2: [Setting Up User Profile](#)

Learn how you can personalize your account with your name, email address, location, email signature, etc. and get started with Zoho CRM.

Lecture 3: [Zoho CRM Screen Tour](#)

With a comprehensive screen tour of Zoho CRM, this lecture will give you the lay of the land:

- The Hometab
- Various modules and features

Lecture 4: [Setting Up Your Email Account](#)

Because emails form an integral part of your day-to-day business activities, it's important to easily access them. In this lecture you will learn how to:

- Setup your email account in Zoho CRM
- View emails

Lecture 5: **Sales Process in Zoho CRM**

In this lecture we will walk you through a typical sales process, and how Zoho CRM fits in at each stage. You'll also learn how to convert leads into accounts and contacts, and how to use deals in Zoho CRM. Key take aways include:

- Working with Activities
- Converting leads into contacts and accounts
- Adding and tracking deals

Lecture 6: **Deriving sales insights with CRM Analytics**

Reports and Dashboards form an integral part of CRM, giving you real-time insights on your organization's key metrics. In this lecture you will learn:

- The different types of reports you can create and view
- How to create custom reports
- How to export reports
- How to create and use dashboards
- How to use advanced filters

Lecture 7: **Resources**

Users are consistently impressed with how intuitive Zoho CRM's interface is. But honestly there's no such thing as too much support. This lecture will go over how you can take advantage of Zoho's help center, and the different kinds of resources that are available 24/7.

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COURSE 3:

Major Features in Zoho CRM

- Lecture 1 - Gamescope
- Lecture 2 - Zia
- Lecture 3 - Zoho CRM for Mobile

Major Features in Zoho CRM

Lecture 1: [Gamescope](#)

With the sole aim of making sales more fun, Gamescope in Zoho CRM lets salespeople compete with each other for badges, trophies, and more.. In this lecture you will learn how to:

- Set up Gamescope
- Create and track games in Zoho CRM

Lecture 2: [Zia](#)

Meet Zia, the AI-driven sales assistant for Zoho CRM. Through data mining and machine learning, Zia optimizes your CRM data to deliver key business information, such as sales predictions, suggestions, and alerts. This lecture will take you through:

- An overview of Zia and how she works
- Zia's predictions and suggestions on
 - Best time to contact
 - Macros
 - Workflow-related notifications
 - Trend Analysis

Lecture 3: [Zoho CRM for Mobile](#)

Learn how you can take Zoho CRM with you, wherever you go! In this lecture we will cover all that's there about the mobile edition of Zoho CRM like:

- How to install native apps
- Mobile-centric features
- Usage

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COURSE 4:

Zoho CRM Integrations

- Lecture 1 - Zoho Docs
- Lecture 2 - Zoho SalesIQ
- Lecture 3 - Zoho Social
- Lecture 4 - Zoho Finance Suite
- Lecture 5 - Zoho Creator
- Lecture 6 - Google Apps

Zoho CRM Integrations

Lecture 1: [Zoho Docs](#)

Following up with leads and contacts often involves having to share documents with them at regular intervals. You could simply upload those to the Documents tab in Zoho CRM and attach them to emails or specific records whenever necessary. In this lecture, you'll learn how to:

- Create a document from Zoho CRM
- Upload a document from your computer into the CRM
- Link or attach documents to records and emails

Lecture 2: [Zoho SalesIQ](#)

Integrate your Zoho CRM account with Zoho SalesIQ to track your website visitors, chat with them in real time, and keep a record of their engagement, all inside CRM. In this lecture we will cover how you can:

- Set up visitor tracking
- Use the Visits tab in Zoho CRM
- Check visitor-related notifications

Lecture 3: [Zoho Social](#)

Learn how you can associate your company's Facebook pages and Twitter account with Zoho CRM. Monitor your social pages right from your CRM, and access the Facebook and Twitter profiles of your leads and contacts.

Lecture 4: [Zoho Finance Suite](#)

Watch this lecture to learn how you can integrate your Zoho CRM account with the Zoho Finance Suite to view invoices, track payments, and more from the accounts and contacts in CRM.

Lecture 5: **Zoho Creator**

Learn how you can integrate Zoho CRM with Zoho Creator, a drag-and-drop platform where you can build your own custom applications, forms, and views. With Zoho Creator inside CRM, extend your platform and build custom applications, forms, and views to use them as custom tabs inside Zoho CRM.

Lecture 6: **Google Apps**

Watch this lecture to learn how you can integrate data between Zoho CRM and Google apps, and make the best use of the customer information you already have.



For more information

www.zoho.com/crm/help