



ZOHO CRM

Zoho CRM for Administrators.

Virtual training - Agenda

Agenda

4 Days 6 Hours

Day 1

Module 1



General

- Personal settings
- Company details
- Gamescope

Module 2



Sales Process Automation

- Leads, contacts, accounts, deals, and campaigns
Activities (tasks, events, and calls)

Module 3



Inventory Management

- Products, quotes, invoices, sales orders, purchase orders, price books, and vendors

Module 4



Support

- Cases and solutions

Module 5



Users and Control

- Users
- Security control
- Compliance settings
- Territory management

Module 6



User Interface

- All mass actions (emails, field updates, changing owner, converting, etc.)
- Macro actions
- Tags
- Merge duplicates

Module 7



Basic Customization

- List view
- Kanban view
- Canvas view
- Advance filters
- Business card view
- Related list customization

Day 2

Module 8



Advanced Customization

- Modules and fields
- Templates
- Wizards
- Pipelines
- Copy customization
- Customize home page (three types of home screen)
- Translation

Day 3

Module 9



Channels

- Emails
- Telephony
- Social
- Chats
- Signals
- Portals

Module 10



Automation

- Workflow and actions
- Schedules
- Assignments rules
- Case escalation rules
- Scoring rules
- Marketing attribution
- Segmentation

Day 4

Module 11



Process Management

- Blueprint
- Approval process
- Review process
- CommandCenter

Module 12



Data Administration

- Import (module specific and data migration from other CRM)
- Export
- Data backup
- Storage (documents)
- Recycle bin
- Audit log
- Sandbox

Module 13



Marketplace

- All
- Zoho
- Google
- Microsoft

Module 14



Other Modules

- Reports and dashboards
- Forecasts
- Feeds

Module 15



Developer Space

- Webforms and analytics
- Webform A/B testing

Module 16



Mobile Apps

- CRM mobile app

Module 17



Zoho Directory

- Single sign-on (SAML)
- Security policies
- Active directory sync
- Login history

Module 18



Zia in Zoho CRM

Module 19



Accounts Security



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