Customization

Part 1

MODULE 5

ZOHO CRM

Course for Administrators

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Overview

Zoho CRM provides you the platform to store customer data, presents innumerable ways to connect with the people you work with, and gives you processes to nurture your prospective customers.

You have probably observed that Zoho CRM mainly focuses on businesses and needs related to sales; hence, the standard modules and fields reflect the common types of business records involved in typical sales scenarios. However, we understand that every business is unique and needs a way to tailor the standard CRM features to best fit their needs. So, we offer a platform where you can extensively customize your CRM account to meet your specific requirements.

Lesson A:

Modules

Lesson Objectives

In this lesson, you will:

- Learn about two types of modules.
- Understand Zoho CRM's standard modules.
- Identify the need for custom modules and learn how to create them.

Modules

Modules are designed to let you categorize and track various business-related information and data under one roof for easy accessibility and comprehension. Zoho CRM provides you a couple of predefined standard modules that you can use as-is without making any alterations. In addition to these, you can add modules that suit your business needs using the custom module option. Let's take a brief look at both kinds of modules.

Standard Modules

The standard modules reflect a typical sales industry in all aspects, providing the sales, marketing, customer support, and inventory management functions needed by any organization engaged in sales. These modules represent a standard sales process that most organizations follow. Zoho CRM lets you work with more than 10 standard modules such as Leads, Contacts, Potentials, Activities, and more, to capture your organization's process.

Custom Modules

Businesses with more unique sales and marketing structures may want to tailor modules to their own requirements, and this is where the custom modules come into play. Zoho CRM gives you the freedom to create modules, fields, and layouts based on the individual needs of your business or its industry. These custom modules can seamlessly integrate with the core CRM modules and need not be stand-alone modules.

To create a custom module

1. Click Setup > Customization > Modules and Fields.

2. Under the *Modules* tab, click **Create New Module**.

3. Enter a name for the module—both the singular and plural forms.

4. Click **Save**.

Zoho CRM for Administrators – Module 5

Activity A

Creating modules

Before You Begin

- Verify that you have the *Modules Customization* permission in your profile.

Scenario

Zylker operates within the finance sector and needs to customize Zoho CRM features to their industry's requirements. They have to create custom modules named Customers, Investors, and Products.

You need to

1. Go to **Setup** and click **Customization**.

2. In the Customization section, select **Modules and Fields**.

3. In the Customization page, under the *List of Modules* section, select **Create New Module**.

4. In the *Create New Module* pop-up, in the *Singular form of module name* text box, type **Customer**, **Investor**, **Product** or **Marketing**.

5. In the *Plural form of module name* text box, type the plural name: **Customers**, **Investors**, **and Products.**

6. In the *Profiles* section, verify if the Administrator check box is checked, and then check the Standard check box.

7. Click **Create** to create the new module.

8. In the *Module created successfully* message box, select **OK** to confirm the message.

Lesson B:

Tabs

Lesson Objectives

In this lesson, you will:

- Understand different views in the home tab
- Learn to create a customized home page.
- Check all the module tabs.

Tabs

Tabs represent the different modules that Zoho CRM offers you. Customizing tab views enable users to navigate the CRM interface more efficiently and in an organized manner, thereby enhancing user productivity.

Home Tab

The Home tab is the start-up page that is displayed whenever you log in to your Zoho CRM account. It contains components from different modules like Activities, Deals, Dashboards, and so on, and one quick glance at the components of the Home tab will tell you how your sales activities are faring. Besides this, the Home tab also serves as a great place to organize your day's work, as well as your teams'. This is facilitated by the three types of views: Classic View, User's View, and Customized Home Page.

Classic View: The Classic View lists three standard components: Tasks List View, Today's Events, and Pipeline by Stage. Because these are the critical components that you'll look for in day-to-day business, having these details well-organized can help you plan your day better. The Classic View is unique to each CRM user and shows the user's Tasks, Events, and Pipeline. This view cannot be customized.

User's Home Page: Individual users can customize the home tab for their account in User's Home Page. A user can add only the selected components that they want to view in their home page. These components can be resized and moved around for fit and placement on the page.

Customized Home Page: Zoho CRM allows you to personalize the home page to display the components that users access most often. This helps users easily navigate to the most frequently-viewed data by adding list views from modules. You can also add components such as pie charts and bar graphs from the Dashboard. You can share this customized view across roles in your organization, and every user associated with that role will have the custom view as their default page each time they log in to Zoho CRM. This customizable home page view enables the users to add frequently viewed data in Zoho CRM.

On the Home page, Zoho CRM shows the Customizable View by default. You can use the toolbar buttons to switch to Classic View. In the Customizable View, you can add the desired components by using the **Add Components** button.

To create a customized home page

1. Go to **Setup > Customization > Customize Home Page**.
   Alternatively, you can also go to the Home tab, click the drop-down on the top right corner and select **Customize Home Page**.

2. Click New Home Page.

3. Click Dashboard.

4. Choose a *Dashboard* from the drop-down list and select components that you want to add to the home page.

5. Click Custom Views.

6. Choose a Module from the drop-down list and select components to add custom view components.

7. Resize or move the components around to organize the page once all the required components are added.

8. Click Save and Share.

9. In the *Edit Properties* window, do the following:

10. Specify a name for the customized home page.

11. Choose the roles of the users with which you want to share this page.

12. Add a description.

13. Click **Save**.

To add components in User's Home page

1. In the Home tab, go to **User's Home** from the drop-down on the top right corner.

2. Click the **Add Component** icon.

3. In the *Add Component* pop-up window, do the following:

a. In the Get from field, specify Dashboards or Custom Views.

b. In the case of Dashboards, select the *Dashboard* from which you wish to add the component, enter the Component Name, and click **Save**.

c. In the case of Custom View, select the module and the required custom view, enter the **Component Name**,.

4. Click **Save**.

The selected custom view is added as a component in your Home tab. You can proceed to further pages using the navigation arrows. Only five records are listed per page.

Customize Column Headings in Components

In the Customizable view, the components that you add in the home tab can be list views or data in the form of pipelines, pie charts, or bar graphs, etc. For the List View components you can easily add, delete, and reorder the columns. Make your desired changes for the list view, and they will be applied to the related components in the Home tab also.

To customize column headings

1. Click the [Module] **tab** (e.g., Leads, Contacts, Accounts, etc.).

2. In the [Module] Home page, select the list view that you want to edit.

3. Click the **Edit** link.

4. In the Edit View page, select and move the fields to the **Available Columns** list box.

5. After selecting the columns, change the order of the columns or remove unnecessary columns from the **Selected Columns** list box.

6. Click **Save**.

The changes will be applied to the related components in the Home tab.

All Modules

In the above section you learned about the Home tab in detail. Now we'll take a look at the modules. The module tabs are the tabs that you view on the **Tabs bar** of the Zoho CRM interface, and they display all the modules that you have created in your CRM account. By clicking on a module you can view the module's home page that displays the list of records.

You can customize the module tabs for each user by customizing the interface, which is specific to each module depending on your company's needs. By using functions like tab actions and tab groups you can organize the tabs to more easily view and navigate the modules that are most frequently used.

Tab Actions

As an administrator, you can perform three key actions using the tab settings in Zoho CRM to help the CRM users navigate easily across all the modules:

- **Organize Tabs:** Organizing tabs will let you view the frequently used modules, hide those modules that are seldom used, and completely hide the modules that are never used. From the Setup page, you can move tabs up or down depending on how frequently users access them. Tabs that are higher on the list will always be visible to users. Tabs that are lower on the list will be partially hidden until users select the drop-down menu. Except for the Home tab, you can unselect tabs that you do not want to be accessible to certain users.

- **Rename Tabs:** Renaming tabs will assure that you use industry-specific nomenclature that is well-comprehended across the teams. For example, the Contacts tab can be renamed "Financial Advisors" in a finance company. The changes made on these tabs are applied across all standard pages, except the Page Layout, Reports, and Dashboards modules. Once the tabs are renamed, the module names that correspond to the field names will also change.

- **Create Custom Tabs:** Based on your organization's needs, you can define custom modules. For example, you could create new modules named "Investors" and "Loans." When creating a new module, you can specify to which profile(s) the new module will be displayed.

Tab Groups

With the Tab Group feature you can group and organize the tabs available in an individual's Zoho CRM account. You can group related tabs together and share the group to the corresponding profiles. You can create a maximum of ten tab groups with multiple tabs in each group. These tab groups are accessible to users based on their profile permission.

Web Tab

The Web Tab feature allows you to add Intranet pages—such as company announcements and web applications—that users can open within Zoho CRM. Web tabs make it easier to provide company-wide information and tools to all users in Zoho CRM. You can create a maximum of ten web tabs and the administrators can give access to the users with other profiles.

A newly-created web tab does not have any cascading effect across other modules, because the tabs that you create are independent in Zoho CRM. However, when specifying web tab names, you need to ensure that you do not repeat the names of the existing modules in Zoho CRM. While adding web pages to the web tab, be aware that some third-party websites do not allow their content to be displayed on other sites.

To organize tabs

1. Log into Zoho CRM with administrative privileges.

2. Go to Setup > Customization > Modules and Fields.

3. In the List of Modules page, click **Organize Modules**.

4. Select the modules you want to be displayed on the tab. Clear the ones you wish to hide.
   You can also move around the module strips to rearrange the order in which the module names are displayed.

5. Click **Save**.

To rename tabs

1. Log in to Zoho CRM with administrative privileges.

2. Go to Setup > Customization > Modules and Fields.

3. Move the cursor to the module that you want to rename.

4. Click on the **More** icon, and then click **Rename**.

5. Enter the **singular** and **plural** forms of the module's name in the respective text boxes.

6. Select the profile(s). Users in the selected profiles will have access to the module.

7. Click **Save**.

To create tab groups

1. Go to Setup > Customization > Modules and Fields > Tab Groups.

2. Click Create Tab Group.

3. In the *Tab Group* pop-up, do the following:

4. Enter a **Name** for the tab group

5. Select the tabs from the list.

6. Select the profiles from the list.
   Users from the selected profiles will have access to the tab group.

7. Click **Save**.

Activity B-1

Creating a module

Scenario

Zylker's finance team wants to include a new module named "Assets and Liabilities." As the administrator, you will need to create this custom module for them.

You need to

1. Select the **Setup** link in your CRM account.

2. On the Setup page, go to the Customization section and select **Modules and Fields**.

3. On the List of Modules page, select **Create New Module**.

4. In the *Create New Module* dialog box, in the *Singular form of module name* field, type "Asset and Liability."

5. In the *Plural form of module name* field, type "Assets and Liabilities."

6. In the *Profiles* section, check the **Standard** check box to make the custom module available to both Administrator and Standard profile users.

7. Select **Create**.

Activity B-2

Grouping tabs

Scenario

The sales team has suggested that only the modules required by their team be displayed in Zoho CRM. This includes Home, Leads, Accounts, Contacts, Deals, Forecasts, Feeds, Products, and Activities. You decide to create a tab group named "Sales Team" that contains only the listed modules.

1. In the Customization section in CRM, select the **Tab Groups** link.

2. On the *Tab Groups* page, select **Create Tab Group**.

3. On the *Tab Group* page, in the *Tab Group Details* section, in the *Group Name* text box, type "Sales Team."

4. In the Tabs section, from the *Available Tabs* list, select Feeds, Leads, Accounts, Contacts, Deals, Forecasts, Activities, and Products. Select the **Add** arrow button to move them to the Selected Tabs list under the Home tab, which is selected by default.

5. Select **Save**.

6. In the *List of Tab Groups* section, observe that the Sales Force Automation tab group is listed and the Tabs column lists the name of the modules that are part of the Tab group.

7. Select the **Zoho CRM Home** page.

Activity B-3

Creating a web tab

Scenario

The portfolio managers want to create a web tab for *USA Today's business news* page.

You need to

1. In the *Customization* section, select the **Web Tabs** link.

2. On the *Web Tabs* page, select **Create Web Tab**.

3. On the *Create Web Tab* section, in the *Tab Name* text box, type "Business News" as the name of the web tab.

4. In the *Link* text box, type www.usatoday.com/money/business/.

5. Select **Save**.

    Observe that in the List of Web Tabs section, the new web name Business News is listed with the link to the web site.

Lesson C:

Fields

Lesson Objectives

In this lesson, you will:

- Learn about standard fields in CRM.
- Learn to create custom fields.
- Understand module to module association.
- Learn about formula and special fields.

Fields

The Standard fields are the built-in fields in Zoho CRM that are included in each module. The standard fields cover the basic fields required for different types of organizations. These fields are visible by default, but you can hide them if necessary. Some standard fields can be modified; others can't be modified because they are mandatory fields that contain unique and critical information about the modules.

Custom Fields

Custom fields are additional fields that administrators create to store company-specific information related to a record in Zoho CRM. Users can access custom fields that you include across all CRM modules. You can show or hide these fields from the CRM modules based on your business needs. If users are already using the organization's Zoho CRM, you need to gauge the impact of creating a new custom field on the sales process. You further need to ensure that there is no adverse impact on both the historical and current sales data within your organization. Subsequently, you need to inform users of the new field, its intended use, and how to implement it in the sales processes of the organization.

The two most important pieces of field-related information that you need to specify for a custom field are:

- **Label**: The name of a custom field.
- **Section Name**: The name of the section where the custom field will be displayed. If necessary, you can move the custom field to another section by selecting it from the drop-down list.

One of the most important points that you must keep in mind while creating a custom field is the field type you want based on the information the field will contain for your organization. The field type determines the data you store and the operations you perform on this data. Zoho CRM uses the field type to interpret data when performing tasks such as sorting records or performing calculations.

For example, you should choose field types such as integer, percent, decimal, currency, or long integer to store numeric data. This will let you sort records in the numerical order and perform mathematical computations on this data. If you create a text field and store numbers in it, you can sort the data only in analphabetical order. Similarly, you must avoid storing date and time data in numeric or text fields because you can perform sorting or calculation tasks on date data only if the information is entered in Date or Date-Time field types.

Custom Field Limits

There is a limit to the total number of fields that you can create in your account and also a limit to the type of fields that you create. This varies based on your Zoho CRM edition.

- Custom fields are not available in the Free edition of Zoho CRM.
- Lookup and Formula fields are not available in the Standard edition of Zoho CRM.

Custom Field Settings

On adding or editing a custom field, you will be able to accomplish a number of actions within it. For example, you can edit a field's basic properties, mark it as required, make it a unique field, and so on. The following are the various custom field settings that are available in Zoho CRM:

Add Custom Fields: In each module, you can add custom fields to capture important data by specifying some field-related information.

Edit Custom Fields: Edit the field properties to change the field label, mark it as a required field, or showing tool tips.

Set Field Permission: Set permissions like read-only, read/write, or don't show, based on the user profile(s) that will access the fields.

Mark a Field as Required: If you want the information in this field to be mandatory, you can simply mark it as required.

Mark a Field as Unqiue: A unique field will hold explicit information about the client or record. For example, email
addresses, social security numbers, passport numbers, product codes, and the like are examples of unique fields because they are particular to one person.

Remove/Delete Custom Fields: If you no longer want to use a particular custom field, you can remove it from the module. However, if you want to delete it permanently from the records, you must remove the field from the unused fields section.

To add custom fields

1. Go to Setup > Customization > Modules and Fields.

2. Click the desired module (e.g., Leads, Accounts, Contracts, etc.) to open the layout editor.

3. From the *New Fields* tray on the left, drag and drop the required field type into the desired module section on the right.

4. Name the field and define the field properties as required for the field.

5. Click Save Layout.

6. Click on the **More** icon in the field to perform further actions like edit, remove, set permission, mark unique, or mark required.

Types of Custom Fields

Every industry has its own set of requirements, and your users may need to go beyond the standard CRM fields when they enter important information into your organization's CRM account. Therefore, Zoho CRM provides you with a varied range of custom fields to choose from. The following are the different types of custom fields that you can select based on the type of value to be entered:

Pick List Values: A few industry-standard pick list values are readily available in each module by default. However, you can either add new pick list values or rename the existing values according to your organization's business processes. You can also view a record's progress over a period or different stages by enabling history tracking for a particular pick list value.

Replace Pick List Value:- This option is applicable if you want the updated or replaced value of a pick list field reflected in every record to which they apply. By choosing the replace function, you can avoid having to update the records manually.

Multi-Select Pick List Value: You can add this pick list field if you want the users to be able to select more than one value for a field. For instance, your organization may be offering different services and some of your customers may be interested in multiple services. In this case you can use the multi-select pick list value instead of a single pick list value. You can periodically modify the available values to reflect any changes in your organization's processes or offerings.

Lookup Field: A lookup field is required if you want to cross-link two different modules or establish a relationship between two modules so that a record's data is displayed in both modules.

Example: Let's say you want to create a link between the modules "Investors" and "Industry" to see which industry type most of your investors are coming from. You can easily achieve this by adding an "Industry" lookup field in the "Investors" module. The related list of the "Industry" module will also list out all the investors associated with the particular industry. We will discuss lookup and multi-lookup fields in detail in the Relationship Fields section of this guide.

Auto number Field: The auto number type of custom field classifies the records by unique numbers. Once the auto number field is added to the CRM module, a number is added sequentially to each new record. This can be also used to update fields in existing records like invoice number, quote number, and sales order.

Currency Field: The currency field allows you to define the decimal place and level of precision based on your selected currency locale. There are four rounding options available for a currency field in Zoho CRM: Normal, Round Off, Round Up, and Round Down.
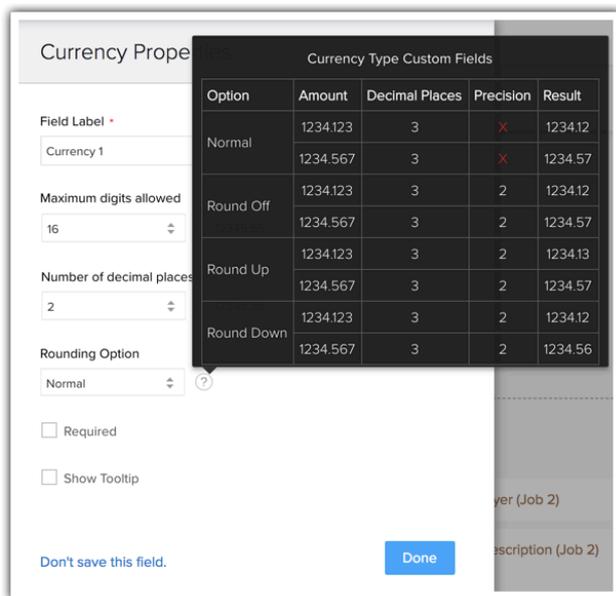
User Field: It is simpler when each record has one owner, but there are cases when multiple users are required to manage a record. In such instances, you can add a user field to the module and include the appropriate users as co-owners of the record. The co-owners will be able to perform actions in the record based on their profile permissions in the CRM account. Workflow rules can be used to include co-owners in email notifications, or email templates or addresses can be associated with the record.

To add a user field

1. Go to Setup > Customization > Modules and Fields.

2. Select the module from the *Modules* list view.
   The *Layout Editor* appears.

3. Drag and drop **User** field from the *New Fields* tray.

4. Enter a **Field Name** (for example, Portfolio Manager, Investment Advisor, Financial Advisor).

5. Click **Save**.

Record Image Field: Some industries would like the customers to get a preview of their product before getting down to business. The record image field allows you to add an image of your product in the CRM module.

File Upload Field:- Users can upload a file or document related to the record.

Formula Field: Formula fields are fields that perform calculations based on the values of other standard or custom fields. For example, a formula field can help a sales executive determine for how long a particular customer has been doing business with the organization. The advantage in this case is that after the formula field is set up, each time the records are accessed in the future, the value will reflect the duration for which the customer has been associated with the organization as of that date, rather than on the date on which the formula field is created. Thus the formula field is automatically re-calculated to reflect the changes in the values of the fields used in the formula.

A formula field comprises three elements: **function**, **argument**, and **operator**.

- **Function** expresses the dependence between two quantities, one of which is input and the other of which is output. The input values that you specify are processed through the function, in turn generating new values. To construct a function, you need to type the function name, followed by a set of parentheses containing the information that is needed to perform the function. **Examples**: Abs(); Ceil(); Timepart()
- **Argument** is a piece of information within a function, which instructs the behavior of specified values. The argument helps define the values for the function. This information is present within parentheses and is separated by commas (argument 1, argument 2, etc.). The types of argument(s) in a function can be texts, numbers, field references, or even another function. The argument types are compatible with all function types. **Examples**: Abs(-27.05); Max(12,6,10)
- **Operator** is a special symbol, such as "+" or "%," that acts upon the specified argument field type (literals, numbers, fields references) in the formula and returns a new value. **Examples**: Abs(+27.50); (32*25)

A formula field can be further distinguished by two components: data types and functions. Below is a brief description of each type:

Data Types in Formula Fields

Data types are the defined set of values and the allowable operations on those values. They represent either the function, argument, return value, or the complete formula itself. The different data types available in Zoho CRM Formula Fields are:

- **Numeric:** The numeric data type contains numbers (digits) in various representations and performs calculations. The data type can be integral types with only whole numbers (positive, negative, and zero) and non-integral types with both integer and decimal parts. *Examples:* +5, -9, 10, 0 (integral types) and -25.02, 27.25 (non-integral types).
- **String:** A string data type is an ordered sequence of symbols. These symbols can be chosen from a predetermined set of mathematical objects or alphabets (unicode characters). *Examples:* "demo," "crm."
- **Date-Time**: The date-time data type is used to store or display values that include both date and time or date only. *Example*: May 15, 2004 11:25am.
- **Boolean**: The boolean data type, also known as the logical data type, is used to represent the logical values of true and false. *Examples:* true, false.

Functions in Formula Fields

A 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 ( ). There are four different types of functions in formula fields:

- **Numeric Functions**: A numeric function in formula fields is used to work with numeric data types and accepts numeric results. Numeric functions are generally used to display the results of typical mathematical calculations. The numeric values (arguments) can be integers or decimals, positive or negative. For example, the formula can use number values like 10, -12, +52, etc.
- **String Functions**: A string is a specialized set of characters, which can contain spaces and numbers, or a contiguous sequence of symbols or values enclosed within quotes to be differentiated from a number or a variable name. A string function is used to manipulate or edit the contents of a string.
- **Date-Time Functions**: Date-time functions are used when working with time and date types such as identifying the day of the week for a given date. You can use these functions when you need the values to contain

both date and time information in a specified format. For instance, the formula can return a value as YYYY-MM-DD HH:MM.

- **Boolean Functions**: A boolean function determines the value output based on the logical calculation of the inputs. In other words, a boolean function evaluates the truth or falsity of each element of its domain. It confirms the entities having one of two values: 1 or 0, true or false, etc,. along with the operations **and**, **or**, and **not.**

Special Fields

Special fields are fields that are available and applicable to specific modules. The types of special fields in Zoho CRM are:

- **Terms and Conditions Fields:** The Terms and Conditions field enables you to define the standard text that expresses your company's terms on invoices. This field is available only for the Invoice, Quote, and Order modules. The Terms and Conditions field applies only for new records that you create after defining the Terms and Conditions values, and not for any existing records in Zoho CRM.
- **Tax Rates Fields:** The Tax Rates field helps you define the appropriate tax rates that are specific to the products you sell to your customers. This field is available only in the Products module. When a user is creating a new invoice, Zoho CRM will calculate the tax based on the products listed. When defining the values, you need to ensure that you input the appropriate "tax type" and the corresponding "tax rate".
- **Contact Roles:** Contact roles define the roles of the contacts or persons with whom you want to do business. This helps ensure that you are having the right discussions with the right people in an organization. In Zoho CRM, standard roles such as Decision Maker, Product Management, Purchasing, and other roles are available by default. You can easily customize the contact roles if desired.

To customize contact role values

1. Go to Setup > Customization > Modules and Fields.

2. Select the **Deals** module from the *Modules* list view.

3. Click the **Module Settings** icon and select **Contact Roles**.
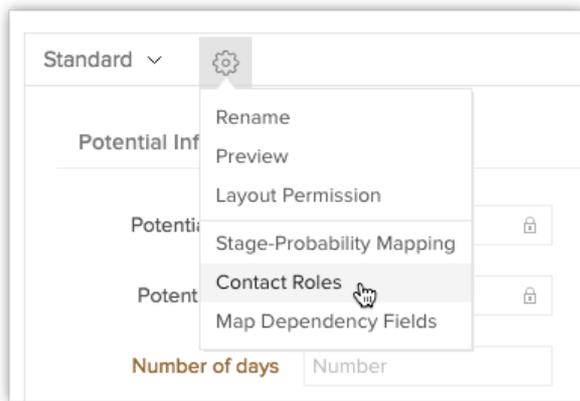
4. In the *Edit Contact Roles* page, do the following:

    a. Click the **Add** or **Delete** icons to add a new role or delete an existing role, as required.

    b. Modify the existing roles from the **Contact Role** text box.

    c. Click and drag the rows to sort their order as required.

5. Click **Save** after updating the contact roles.

To add contact roles to contacts

1. In the *Deals home page*, select the required deal.

2. In the *Deals Details* page under the *Contact Roles* section, a list of contacts associated with the deal is displayed. Click the **Add Contact Roles** link.

3. In the *Contact Roles Mapping* page, select the checkbox(es) of the contacts that you want to add.

4. Select the **select all** checkbox, to associate all the contacts.
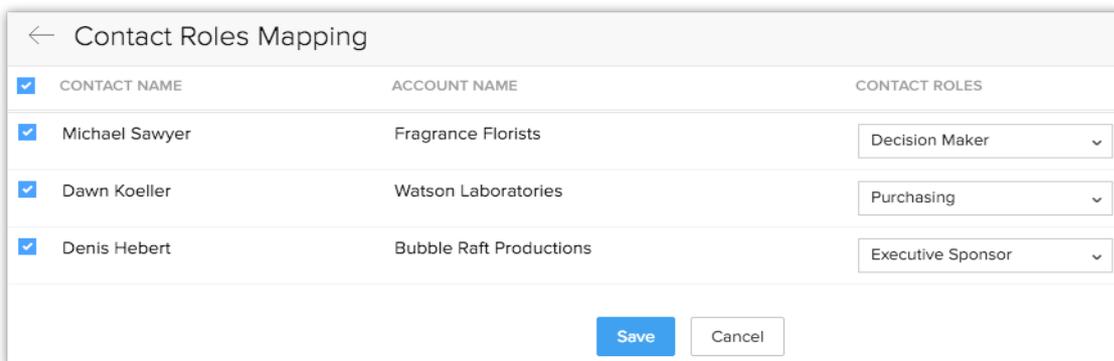
5. For each contact, select the role from the **Contact Role** drop-down list.

6. Click **Save** after associating roles with all the contacts.

Relationship Fields: Relationship fields in Zoho CRM let you build a connection between two different modules. There are two types of relationship fields that you can choose from depending on your needs.

Lookup fields: Lookup fields can help you establish a relationship between two different modules, so that you can view relevant fields from a second module while still in the first module.

To add a look-up field

1. Go to Setup > Customization > Modules and Fields.

2. Select the desired module (e.g., Leads, Accounts, Contracts, etc.) from the Modules list view.
   The *Layout Editor* appears.

3. Drag and drop the Lookup field type from the *New Fields* tray into the required *[Module] Section* on the right.

4. In the *Lookup Properties* popup, do the following:
   a. Enter a name for the lookup field in the Field Label text box.
      Example: in the Investors module, create a lookup field called *Industries*. This field will now be available when you create an investor.)
   b. Select a module from the *Lookup Type* drop-down. Data from the module you select here will be listed in the field.
   c. Example:, if you select Industries, the lookup field will list all the industries.
   d. Enter the Related List Title.
   e. Example: Enter "Other Investors." A related list will be created for the records in the **Industries** module.
   f. Click **Done**.

5. Click Save Layout.

   The Industries lookup field will be found while creating investors.
   The Other Investors related list will be found in all records details pages of the Industries module.

Multi-Select Lookup Fields: A lookup field will help you establish a relationship between two modules through a single value. Now, if you run a business that sells

a variety of different products, there may be situations where your client is interested in two or three products. In this case, to establish a relationship with more than one value, you need to use a multi-select lookup field that will allow you to link multiple values between two modules.

Example: Zylker Real Estates manages buying/renting apartments. They have two modules in their CRM - **Listings** and **Prospects**.

- Jack Smith, one of the prospects, is interested in looking at 3 listings (C-807, B-196 & H-786).
- Apart from Jack, 3 other prospects - Jane, Jill and Derek - are all interested in looking at C-807.

This means, when the record Jack Smith is created, 3 values need to be chosen for the listings he is interested in. Also, the listing C-807 should have 4 prospects associated with it. So there is a need to choose many values from a lookup field. A regular lookup field lets you choose only one value. In this case, Zylker Real Estates could create a multi-select lookup field. Let us see how.

To create a multi-select lookup field

1. Go to Setup > Customization > Modules and Fields.

2. Select the **Prospects** module.

3. From the list of fields available, drag and drop the *Multi-select lookup field*. Note that you can create a maximum of two *Multi-select lookup fields* per module.

4. In the *Multi-Select Lookup Properties* window, enter the details.

Multi Select Lookup Properties

Create relationship between B and C modules such that module B can have many records in module C and vice versa.

Field Label *

Listings interested in

Select Related Module

Listings

Field Label in Related Module *

Associated Prospects

☑ Allow creating relationship-specific modules.
A linking module with all the associated records will be created. You can customize this new module with custom fields. Know more.

Enter Linking Module Name

Prospects Vs Listings

Don't save this field.   Done

5. Select the Allow creating relationship-specific modules checkbox if a Linking Module is required and enter its name.

6. Click **Done**.

7. **Save** the layout.

Linking Module: When you associate two modules using the multi-select lookup field, the resulting records are a combination of both the modules and thus can't be listed in both modules. To accommodate these records, Zoho CRM allows you to create a Linking Module. A linking module serves as a junction between two modules that are associated with a multi-select lookup field. Each association between two modules is created as a record in the linking module.

To create a linking module

1. Select the **Allow creating relationship-specific modules** checkbox while creating the multi-select lookup field.

2. Enter a name for the linking module.

8. You can perform the following actions from within a linking module:

- The related list of the associated modules will display the details of the **Linking Module**, but only if you have created a related list.
- Customize the related list columns to display the details you wish to see.
- Rename the related list as you see fit.
- Edit a linking module's record directly from this related list by clicking on the **Edit** icon against each record.
- Add new records to the related list or edit the existing record association directly from this related list. Simply click the **Add** or **Edit** links above the related list to do the same.
- The records in the linking module will have no other related lists except *Notes*.
- Create reports and dashboards based on the records in the linking module.

Activity C-1

Creating multi-select lookup fields.

Scenario

An educational institute wants to establish a relationship between their students and courses. Create a multi-select lookup field for them in CRM.

You need to:

1. In Modules and Fields, select the **Students** module

2. In the Layout Editor page, drag and drop the *Multi-select* lookup field.

3. In the *Multi-Select Lookup Properties* window, enter the details given below:

   - **Field label**: Courses interested in
   - Select Related Module: Courses
   - Field Label in Related Module: Associated students

4. Select the **Allow creating relationship-specific modules** checkbox to allow module linking and enter the name of the module.

5. Click **Done**.

6. **Save** the layout.

Lesson D:

Stage Probability Mapping

Lesson Objectives

In this lesson, you will:

- Learn about different sales stages in CRM.
- Understand and assign stage probablity mapping.

Sales Stages

Sales stages are defined steps that enable you to follow-up on the progress of the sales process. Each stage in the sales process is connected to the key activities, deliverable, or milestones to be accomplished before progressing to the next stage. You can provide detailed descriptions about each stage for the users' benefit, and you can add sales stages to the existing default stages in the CRM process. Some of the sales stages that are applicable across organizations are Launch Campaigns, Lead Generation, Lead Qualification, Work Opportunities, Convert Sales, and Customer Support.

Stage Probability Mapping

Stage-probability mapping helps you to identify the performance of a sales deal or prospect in the sales pipeline. This stage probability is mainly determined by values derived from two factors: the *forecast type* and *forecast category*. The values of these two factors define the stage of a deal sale. In the Deals module, you can modify the values to meet your organization's needs by adding new stages and assigning new probability values. Stage probability mapping helps you perform several operations in the sales process, including:

- Creating different types of sales stages according to your organization-wide sales process.
- Associating probability values with sales stages.
- Associating forecast types with sales stages.
- Associating forecast categories with sales stages.

To enhance the sales process analysis, you should assign different probabilities ranging from 0 to 100 to the sales stage values. When applicable, use the probability value 100 for closed deals.

To map stage and probability values

1. Go to Setup > Customization > Modules and Fields.

2. Click the **Deals** module from the Modules list view.

3. Click the **Module Settings** icon and select Stage-Probability Mapping.

4. In the *Stage-Probability Mapping* page, do the following:

5. Add the sales **Stage**(s) and the corresponding **Probability** of closing the sales deal by clicking on the **Add** icon.

6. Delete sales **Stage**(s) and assign the existing **Probability** to another Sales Stage value by clicking on the **Delete** icon.

    a. To modify the existing **Sales Stages**, double-click inside the desired **Stage Name** and enter the new name.

    b. Click and drag the rows to rearrange the order of the stage.

7. Click **Save**.

Activity D

Modifying Stage Probability field

Scenario

In a recent sales meeting, the sales team proposed some changes to the company's stage probability values and contact roles. These changes, which are approved for implementation, include:

- Renaming **Proposal/Price Quote** as **Drafting Proposal**, but retaining a probability value of **75**.
- Renaming **Negotiation/Review** as **Negotiating**, but retaining a probability value of **90**.
- Adding three new proposal-related stages: **Proposal Sent** with a probability value of **77, Proposal Discussed** with a probability value of **78**, and **Proposal Modification** with a probability value of **80**.
- Modifying the existing contact role **Purchasing** to **Economic Buyer**.
- Adding three more new contact roles: **Technical Buyer**, **Business User**, and **Influencer**.

D-1. Modify the names of the two stage probability stages.

You need to

1. On the Getting Started with Zoho CRM page, in the top-right corner of the window, select the **Setup** link.

2. On the Setup page, in the Customization section, select the **Modules and Fields** link.

3. On the Leads: List of Fields section, from the Modules List drop-down, select the **Deals** module.

4. On the Deals: List of Fields page, select **Stage-Probability Mapping**.

5. On the Edit Pick List page, in the Stage Field Information section, in Stage Name column, select the name of the sixth stage, **Proposal/Price Quote**,

and press the **Delete** key. Type Drafting Proposal as the new name of the stage.

6. In the Stage Name column, select the name of the seventh stage, **Negotiation/Review**, and press the **Delete** key. Type Negotiating as the new name of the stage.

D-2. Add the three new proposal-related stages, set their probability, and sort order values.

You need to

1. In the Stage Field Information section, select **Add Stage**.
   a. In the *New Stage Name* text box, type **Proposal Sent** as the stage name.
   b. In the Probability column, type 77 as the probability value.
   c. In the Sort Order column, type 7 as the sort order value.
   d. Verify that Forecast Type is set as Open and Forecast Category is set as Pipeline.

2. In the Stage Field Information section, select **Add Stage**.
   a. In the *New Stage Name* text box, type **Proposal Discussed** as the stage name.
   b. In the Probability column, type 78 as the probability value.
   c. In the Sort Order column, type 8 as the sort order value.

3. In the Stage Field Information section, select **Add Stage**.
   a. In the *New Stage Name* text box, type **Proposal Modification** as the stage name.
   b. In the Probability column, type 80 as the probability value.
   c. In the Sort Order column, type 9 as the sort order value.

D-3. Modify the sort order values.

1. For the Negotiating stage, in the Sort Order column, change the value from 7 to 10.

2. For the Closed Won stage, in the Sort Order column, change the value from 8 to 11.

3. For the Closed Lost stage, in the Sort Order column, change the value from 9 to 12.

4. For the Closed Lost to Competition stage, in the Sort Order column, change the value from 10 to 13.

5. Select **Save** to save the changes.

Lesson E:

Validation Rules

Lesson Objectives

In this lesson, you will:

- Understand validation rules.
- Learn how to validate fields in Zoho CRM.

Validation Rules

As your business expands, your sales increase in leaps and bounds and so does the number of customers you deal with. You can imagine it multiplying a hundred times over if your business manages to attract global acclaim. As you expand, it can become a challenge to ensure the validity of the data in your CRM. Your employees rely on the data that they see, and poorly-maintained data can cost your company in more ways than one: slowing down your activities, costing you accuracy in reporting, and the plain annoyance of manually verifying the details of each record when you have more important activities to deal with.

Here come validation rules to the rescue. They help you restrict invalid data, or the wrong kinds of data, from entering your CRM system.

The Basics of Validation Rules

There are some important aspects of validation rules that you must keep in mind:

- Validation rules allow you to define **how you don't want your data to be**. That is, you will define the undesirable values for a field in a validation rule. If a field value entered for a record matches the criteria defined in the rule, CRM will display an alert and will not allow the record to be saved.
- The error message is customizable.

Example: You don't want deal discounts ever to be greater than 15%. If you were to set this validation rule in CRM, the instructions for your validation rule would be the following:

- "If Discount is greater than 15% throw an alert message."
- Error to be displayed: "Sorry! We don't allow a discount greater than 15%."

You can further drill down the rule by defining different custom error messages based on specific criteria. For instance, you can specify that the discount for India should not be greater than 15%, but the discount for the UK can be up to 20%. Here

you will have branch conditions for the discount fields and specify appropriate error messages. You will learn more about these multiple conditions in the following sections.

To create a validation rule

1. Go to Setup > Customization > Modules and Fields.

2. Select the module for which you want to create the validation rules.

3. In the [Module] page, click the **Validation Rules** tab.

4. Click + Create Validation Rule.

5. In the *Create Validation Rule* pop-up window, perform the following actions:
    a. Choose the **layout** that the field you wish to validate belongs to.
    b. Choose the **field** and define the primary condition to initiate the rule.
    For instance, if you want to validate the discount field to keep out discounts more than 15%, your primary condition will be "**Discount > 15%**"

6. Click **Next**.

7. In the *Validation Rule Editor,* enter the **alert message** that should be displayed for records that meet the condition.
   Example: Sorry! We don't allow a discount greater than 15%.
   Note that this error message will be displayed for **all the records** that meet the criteria. With this rule in place, whenever a user attempts to create a deal with more than a 15% discount, this error message will be displayed.

8. Move the cursor over the *More* icon and click **Edit**.
   Example: Zylker's policies define allowable discounts based on sales regions. For India, the maximum discount that can be offered is 15%, but in the UK it can go up to 20%, and so on. You can define these additional conditions in the validation rule and customize the error messages as required.

9. In the field Which records would you like to apply the rule to?
   select **Choose based on specific conditions.**

10. Define each condition and specify the appropriate error message.

11. Click **Add another option** to change the value of the primary field and configure different alert messages as required.

12. Click **Save**.

Lesson F:

Module Views

Lesson Objectives

In this lesson, you will:

- Discover the benefits of different types of views.
- Create and choose the right type of view.

Module Views

A module view defines the way a list of records for a specific entry is displayed. A view defines the following:

- The columns that are displayed in the module
- The way list of records are sorted by default
- Default filters that should be applied to display only the relevant records

Apart from the above benefits of a default view, there can be requirements in your business that compel you to change the display, like better comprehension of data, ease of data retrieval, or product image display. To address such necessities, Zoho CRM provides you three different types of module views: List View, Kanban View, and Canvas View.

List View

A list view groups the records based on a defined set of criteria. It is helpfull for displaying customer-specific data according to a business's unique needs. For example, you may be interested in following up on the leads created during the last week, or reviewing overdue tasks, or you may want to filter out big deals. The best way to handle scenarios like these is to filter the records using the list views. You can also use the list views for changing record owners, deleting records in bulk, and sending mass emails.

List views are categorized under **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 drop-down. Just click the **star** next to a list view and it will be available under Favorites. There are two types of list views:

- *Standard List Views*: In the *<Module> Home* page, you can select the required list view from the *View* drop-down list. Only the standard view modes allow you to rearrange the order of the columns or add more columns. Some of the standard list views are All Records, My Records, Recently Created Records, Recently Modified Records, Recently Viewed Records, etc. You cannot delete these list views.

- ***Custom List Views***: You can create list views and define the criteria by which the records are filtered. You can modify and delete the custom list views and also sort the order of the columns in the list.

Setting up Permissions for the List View

In the *Accessibility Details* section, define the user's permissions to view the custom lists. The following options are available:

- All users are allowed to view this custom view.
- Show this custom view only to me.
- Allow the following users to view this custom view.

Select All Records in a Custom List View

You can select all the records that belong to a particular custom view in one shot.

Consider this scenario: you wish to change the record owner of all leads in the custom view called *Tradeshow leads*. Say you have over 20,000 leads in this custom view—it's a hassle to keep navigating to the "Next" page and selecting all leads on every page.

Instead, you can simply click the **Select All [Records] in this View** link. All 20,000 leads will be selected in one shot and you can change the owner for all these records easily. All the records in that list view will be selected.

Once all the records in that custom list view are selected, you can perform the following bulk operations on those leads.

- Mass Update
- Change Owner
- Delete

After you have applied a mass update/change owner/delete action, the progress bar at the bottom right corner of your screen will let you know about the status of the update.

To create custom views

1. Click the *[Module]* **Tab** (e.g. Leads, Contacts, Accounts, etc.).

2. In the *[Module] Home* page, move your cursor to the list view's drop-down.

3. Click the **Create View** link.

4. In the *New View* page, do the following:
    a. Enter the custom **View Name**.
    b. Mark as **Favorite**, if required.
       The custom list views marked as favorite will be listed first in the list view drop-down.
    c. **Specify Criteria** to filter the records.
       Tags can also be used as part of Criteria to filter records.
    d. Select the columns to be displayed in the module view.
    e. Under the *Share this with* section, choose who can see this view.

5. Click **Save**.

Kanban View

Kanban view is a card-based view that displays the data in an organized manner for better comprehension.

For example, you can segregate the leads based on their status or categorize the sales depending on different stages. This sort of information gives you better insights about potential bottlenecks and lets you fix them effectively. Thus, kanban view presents your CRM data in a more productive manner. You can create kanban views across all the CRM modules. There are two types of kanban views: Pre-defined and Customizable.

A) **Pre-defined** – The pre-defined kanban views are available for Activities, Social, Visits, Deals, and SalesInbox. Below is the CRM view for the Activities module, based on Customers, Open Deals, Leads/Contacts, and Others.

B) **Customizable** - You can create a customized Kanban view for any module. All you need to do is provide a few details:

- **Kanban View Name**: You can enter any name for the kanban view created, for example "Lead Details."
- **Categorize By**: Select the category in which you want to segregate the data, for example "Lead Status."
- **Aggregate By**: Select a currency or number field for which you want the aggregated value, for example "Expected revenue/Number of user licenses." A summed-up value for each category will be displayed.
- **Select Fields**: Select the fields that you want to view within each record.

Working with kanban view

Creating a kanban view will give you precise information about all the records at one click. You can create a kanban view for all the modules except Activities, Visits, and Finances.

In addition to viewing the record details in an organized manner you can perform several other operations from the kanban view. Let's take a look at each of them:

Drag and Drop: You can drag and drop a record from one column to another based on your requirements. For instance, a lead listed under Attempted to Contact has declined the present offer and you want to keep them in the pipeline for future reference. So, instead of editing the record and changing the status, you can simply drag and drop the record to the desired column to automatically change the status. The aggregated value of the respective columns will also be updated.

Mass Operations: You can send mass emails, create tasks, create macros, and so on. From the **More Actions** icon, you can change owner, mass update a field, mass convert the leads, or delete leads.

Select a Layout: A user can select a layout in which they want to view the module.

Sort Records: A user can sort the records based on the fields they want to view like company, first name, last name, lead owner, and so on.

To create a kanban view

1. Click the *[Module]* **Tab** (e.g. Leads, Contacts, Accounts, etc.).

2. In the *Module* page, click the **Kanban View** icon.

3. In the *Kanban View Settings* pop-up, fill in the following details:

   • Kanban View Name
   • Categorized By
   • Aggregate By
   • Select Fields

4. Click **Save**.

Canvas View

Canvas View lets you sculpt an exclusively personalized view of the records. You can customize, add record images for better identification, use custom buttons to represent the fields, use a particular font style or size, change the alignment of field types, group similar field types, and much more.

Additonally, you can choose from a gallery of design templates, or create and customize your template with specially-crafted design tools. The design layout editor lets you define additional customizations to the records display.

Design Layout Editor

The design editor consists of many tools that you can use to give your module a personalized and unique look. A few of the design elements are:

- **Style**: You can choose from a wide range of styles to mark your data as vital information, secondary information, highlight grey, paragraph text, subtle information, date & time, low priority, and more.
- **Font Size**: Select font size from the range of 11px to 21px.
- **Group**: Group two or more fields. Grouping is perfect when a customer has to enter lengthy text or text that has many characters. The field text box automatically expands to accommodate the entries without compromising the text alignment.
- **Shuffle data**: Use this option to shuffle the CRM records within the template.
- **Label**: Toggle off the label icon if you do not want the field label to be displayed.
- **Color**: Choose a text or background color for the field entries. You can select a color from the default list or create your own color palette.

Design & Build Canvas View

You can build a canvas view by choosing a predefined design template or creating your own template from the scratch. You can create a canvas view for both standard and custom modules except the Activities module. For designing and building a canvas view, follow the steps below:

Step 1. Create canvas view

1. Select a desired module.

2. Click the **Canvas View** icon [ ] .
   You will be redirected to the *Canvas View* page.

3. Click **Create Your First Canvas View** to continue.
   Next, you will have to choose a design template or build your own
   template.

Step 2. Choose a design template or build your own canvas view

Once you choose to create a canvas view for a particular module you can do either
of the following for creating a design template:

Choose a template: Zoho CRM lets you choose from an array of pre-defined
templates. The templates involve a variety of categories like People, Help Desk,
Real Estate, Automobile, Organization, and so on.

Build your own view: This option lets you build your own canvas view. You will be
using additional customization options available in the layout editor for creating a
personalized view of a module.

To choose a template:

1. In the *Choose Template* page, select a category from the available options.
   You can choose from People, Organization, Deals, Product, Help Desk, Real
   Estate, and Automobile.

2. Choose and click on a template.

3. In the *Field Mapping* page, select a field and choose any field from the
   drop-down list to which you want to map.

4. Click **Next** to continue.
   Next, you will be redirected to the *Canvas View Builder* page to design your
   layout. Refer to the layout editor table below for designing details.

5. Click **Save**.

6. Enter a name for the canvas view created.

To build your own view:

1. In the *Choose Template* page, click **Blank Template**.

2. In the *Canvas View Builder* page, design your layout.

3. Drag and drop the fields into the blank template (e.g., Account Owner, Account Name, etc.).

4. Edit the template design.
   Refer to the layout editor table below for designing details.
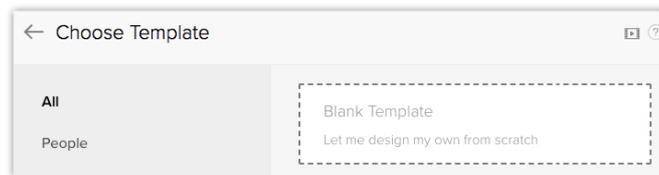
The below layout editor table describes the designing tools available in the canvas builder:

Design Item	Description	Types
Style	Define a style in which the field name will appear. You can choose from the 12 available styles.	• Normal Text • Record Name 1 • Record Name (Blue) • Record Name (Green) • Vital Information (Orange with bold font) • Secondary Information • Highlight Grey • Highlight Blue • Paragraph Text • Subtle Information

		• Date & Time • Low Priority
Font Size	Choose the font size in which the field text will appear from the drop-down list.	• Range of 11px to 21px.
Font Type	Select the field text style.	• Thin • Light • Regular • Semi-bold • Bold • Extra bold
Italics	Select if you want the field text to appear in italics.	• *I*
Strike through	Select if you want to strike out the field.	• a̶b̶
Capital	Select if you want the field text appear to appear in all caps.	• AA
Color	Choose a text or background color for the field entries. You can select a color from the default list or create your own color palate.	
Text Alignment	Select either left, right or center alignment for the field entries.	

Spacing	Increase the spacing between the fields up, down, left and right.	
Label	Toggle off the label icon if you do not want the field label to be displayed.	
Icon	Select the custom buttons to represent a field label from the drop-down list.	
Copy Style	Copy any of the defined field label or value style.	
Paste Style	Paste the style to the selected field label or value.	
Group	Group two or more fields. Grouping is perfect when a customer has to enter lengthy text or text that has many characters. The field text box automatically expands to accommodate the entries without compromising the text alignment.	
Ungroup	Ungroup the fields if you no longer want them in a single text box.	
Delete	Select a field and delete if required.	

Undo and redo arrows	Using the two arrows, you go back and forth to change the design.	
Shuffle data	Use this option to shuffle the CRM records within the template.	

Step 3. Preview the template

Once the template is designed, you can preview it. If required, you can make any necessary changes before saving.

Step 4. Share the canvas view

You can choose to share the canvas view that you have created. You can share the view either with all the CRM users or choose a selected list of users. The CRM users will be filtered based on roles, groups, users, or roles and subordinates.

1. Click **Save** once the canvas view has been created.

2. Enter a name for the view.

3. In the *Share this with* field, choose one of the following:

   - Only me
   - Everyone
   - **Selected users**: For *Select Source type*, choose and add users from either *Groups*, *Roles*, *Roles and subordinates,* or *Users*.

4. Click **Save**.

Manage, Edit and Create Additional Canvas Views

If required, you can edit a canvas view that has been already created and create more than one canvas views for a module.

To edit and create canvas view:

1. In the *Module* page, go to the *Canvas View* and click **Manage** from the drop-down list.

2. In the *Manage Canvas View* page, choose either **Edit**, **Clone**, **Share**, or **Delete**.

3. Click **Create Canvas view** from the drop-down to create another view in the module.

Lesson G:

Related Lists

Lesson Objectives

In this lesson, you will:

- Learn about related lists
- Learn to add related lists from different sources

Related List

The Details pages of specific modules contain details of records from other modules. The record details from other modules that appear as part of another module's Details page are referred to as related lists. The related lists feature provides an association between records in the current module with related records that are available in other modules of Zoho CRM. For example, on the Accounts Details page, the details of the Contacts and Potentials modules are listed.

In all Zoho CRM editions, you can customize the related lists by selecting Setup→Customization→Related List. On the Related List Columns page that displays, you can customize the related list by selecting the list of columns that need to appear on the Details page of a module. Further, you can reposition the fields based on your requirements.

The enterprise edition of Zoho CRM provides another feature called custom-related lists, which can be accessed from the Record Details view of specific modules by selecting Settings→Add Related List. The custom-related lists allow you to access data that is collected from sources such as pre-defined third-party custom functions. The custom-related lists can be added to the Leads, Contacts, Accounts, Campaigns, Potentials, and Vendors modules. However, you can customize the fields or columns in the related lists in all modules.

Adding a Related List

You can pull data from various sources to create related lists with two options:

- **Zoho Creator's Custom Apps**: Add records from Zoho Creator Apps as related lists.
- **Third-Party APIs** - Add Third-Party APIs as related lists. You can either choose from pre-defined functions from the gallery or create your own functions.

Use Custom Applications as Related List

You can extend your CRM platform with Zoho Creator custom applications . The forms and views can be used as custom tabs inside Zoho CRM. If you have Zoho Creator Integration activated in your Zoho CRM organizational account, you can view the records of a Custom App's view using a custom related list in your CRM modules.

Third-Party APIs as Related Lists

Using APIs, you can add third-party services as related lists into Zoho CRM modules. You can either use the pre-defined third-party custom functions from the Gallery or create a custom function for the third-party service you wish to add in the related list.

You will need to call the API provided by the third-party vendor, and parse the response. The response has to be formatted to suit Zoho CRM.

Zoho CRM offers some pre-defined functions that are ready to use. Browse through the gallery and select a function that suits your requirements. The selected function will be added to your list of custom functions. You can then use this function as a related list anytime. The following are the third-party contextual integrations that are provided by CRM:

- Zoho Recruit
- Contactology
- Saasu
- FreshBooks
- Zoho People

Create Custom Functions

In addition to the pre-defined functions from the gallery, you can also write your own custom functions using Deluge script.

Deluge Script

Deluge, short for Data Enriched Language for the Universal Grid Environment, is an online scripting language integrated with Zoho Creator. It enables users to add logic to the application, incrementally, making it more powerful and robust. The entire database layer is abstracted, and while scripting in Deluge you will only speak in terms of forms and fields.

Custom Function

A function is a set of statements grouped together under a name and can be invoked from anywhere within a program. Deluge scripting supports functions, which allow us to structure the script in a more modular way, accessing all the potential that structured programming can offer. Related functions can also be grouped under a common category based on their purpose, called names pace, which helps in easy maintenance. Functions can be invoked from form/field action scripts or on selected records in a view.

To use a custom app to create a related list:

1. Click a **Module** (tab) and select a record.

2. In the *Record Details* page, click **Add Related List**.

3. In the *Add Related List* pop-up box, click **Custom Apps**.
   All the Zoho Creator custom apps that are shared to your account will be listed.

4. From the list of custom apps, click Add Now for the corresponding app that you want to use.

5. In the *Add Related List* page, do the following:
   a. Specify a **name** for the Related List.
   b. Choose a **Form** from the drop-down list.
   c. Based on the form that you choose, the associated views will be available.
   d. Choose a **View** from the drop-down list.
   e. The selected view will be used as the related list for the module.
   f. Specify a criterion for Fetch records for the related list only if [Zoho CRM field value] matches with [Custom Form field value].

g. Select the check box of the fields that you want to view in the related list.

6. Click **Save**.

Lesson H:

Custom Links & Buttons

Lesson Objectives

In this lesson, you will:

- Learn about custom links and buttons
- Provide permission to the custom links
- Learn different ways to add a custom buttons

Custom Links

The **Custom Links** feature enables users to access third-party links that are added in their account. Once the custom links are set, they can be viewed in the account owner's page. The number of custom links that you can create is based on your Zoho CRM edition.

Employees may need to gather information related to sales activity by accessing external web sites. You can add links to these external web sites so that users can easily access them. The **Fields & Links Permissions** page provides you with options for giving or revoking access permissions for the custom links. You can also hide the existing links based on your organization's requirements. Here are some examples where custom links in Zoho CRM can be used:

- Accessing your contacts' Twitter profiles: All the contacts in your account can have a field where you specify their Twitter ID. By creating a link for Twitter, you can directly go to the contact's Twitter profile in a single click. Example: The link can be: https://twitter.com/#!/${Contacts.Twitter ID}
- View maps: Zoho CRM provides the Locate Map option to view the address of the contacts in Google Maps. If you want to view the address location using some other application, then you can define a link.

Access Permissions to Custom Links

There can be a requirement to access external sites or applications to see required sales information. In such cases, when custom links are created, you need to authorize the usage of such external sites by providing access permissions to links.

To add custom links

1. Go to Setup > Customization > Modules and Fields.

2. From the list of modules, select the required module.

3. In the *Links and Buttons* tab, click **Create New Link**.

4. In the *Create New Link* page, do the following:

a. Enter a name for the link in the *Label* text box.

   The label should not exceed 50 characters.

b. Enter a description for the link.

   The description should not exceed 250 characters.

c. Enter the value to construct the URL.

   The URL length should not exceed 3000 characters.

d. Select the **Field** from the drop-down list.

   On selection, the field variable will be inserted as part of the URL.

e. In the *Set Permissions* section, choose the user profiles that are allowed to access the links. Users who have "**Customize Zoho CRM**" permissions in their profile can set access permissions for the links at the time of creating the links. Based on these permissions, other users can use the links.

5. Click **Save**.

   The link will be available in the *Record Details* page.
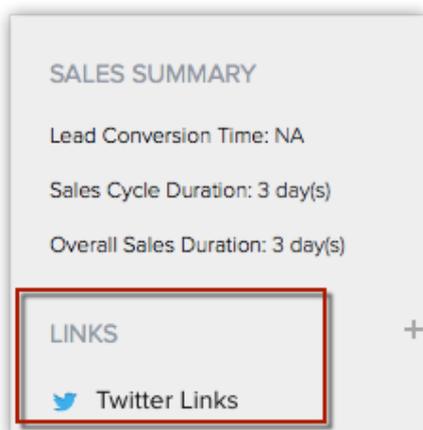
Custom buttons

The standard buttons in Zoho CRM are used to execute various predefined actions. For example, **Convert** is a standard button used to convert a Lead to a Contact, Account, or Potential. Similarly, **Clone** is another standard button that is used to clone any record within your CRM account. Likewise, you can create new buttons and define a set of actions based on the requirement. Custom buttons can also be used to connect your CRM with third party applications, connect different Zoho CRM modules, or connect other Zoho applications.

Define Button Action

Every custom button should be associated with an action when a user clicks the button. You can define your button action any of the following ways:

From gallery: There are a few ready-to-deploy button actions in the gallery, which you can associate with a custom button for different business scenarios whenever required. For example, you can use the **Recurring Potential** button to repeat a potential for a certain period of time. You can create a custom button that will clone a particular potential record information for the next one year.
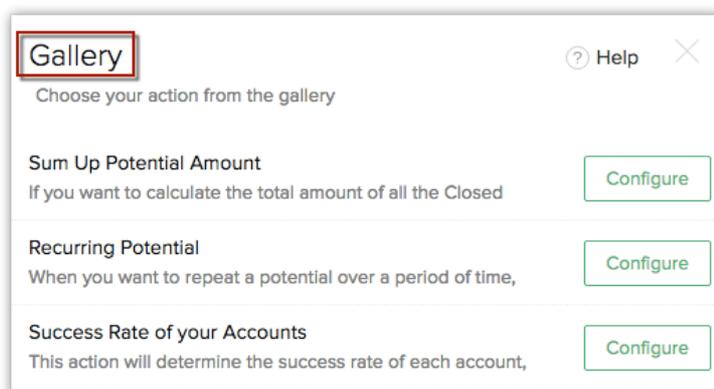
From existing actions: Existing actions are predefined button actions created by users in an organization. This option will be available only when you have already created custom functions for custom buttons in your CRM account. These actions can be reused with different custom buttons whenever required.

Define your own button action: You can define your own button action in the following ways:

- *By writing a custom function*: With the help of the Deluge Script Editor, you can write your custom function and define the button action. When writing a custom function, you can initiate response tracking that will create an alert or pop-up notification whenever you click on the custom button. If any open URL tasks are configured in custom function, the last opened URL task will be opened either in a new tab or a new window or a pop-up window.
- *By invoking a URL*: Using **Invoke a URL***,* you can open a URL in a click of a button. This will open a desired action either on a new window, or the existing window or on a new tab.
- *By opening a web tab*: This action allows to open a web tab in a new tab along with the associated merge fields in just a click of a button. You can either create a new web tab or choose from the list of web tabs that have been already created and associate the tab with your custom button.

Sort or Edit Custom Button

You can edit and sort the custom buttons as and when required. If you have created many custom buttons in your account, you can sort the order in which the buttons are visible in the module/record.

To create a custom button

1. Log in to Zoho CRM with administrative privileges.

2. Go to Setup > Customization > Modules and Fields.

3. From the list of modules, select the required module.

4. In the *Links & Buttons* tab, click **Create New Button**.

5. In the *Create Your Button* page, do the following:
   a. Enter the name of the button.
      The button name should not exceed 30 characters.
   b. Click the **Add Description** link and specify the details of your custom button.
      The description should not exceed 250 characters.
   c. Choose the location of your custom button from the drop-down list.
      Custom buttons can be placed in 6 different places in your CRM

account: Create/Clone page, Edit page, View page, List View page, a button for each record in the list view, and the Related Lists Page. Note that you can create up to 50 buttons for each module.

    d. Choose an action to be executed when a user clicks the custom button. You can either choose a predefined action from the gallery or an existing action that was already created by users in your organization. You can also define your own action by writing a custom function, open a new web tab, or invoke a URL based on your needs.

6. It is mandatory to choose the button action. Click **Save.**
Once the custom button is associated with an action, CRM administrators can manage permissions by assigning only specific profiles to view and access the custom button.

Activity H

Creating a link

Scenario

The sales team would like to gather more information about prospective leads by accessing the leads' websites. However, to save time, they want the websites to be accessible from within the module details page. To check out this functionality, you decide to add links to two lead websites, namely www.twitter.com and https://plus.google.com. In addition, you decide to hide the second link as you need to get authorization before you allow access to this link within your organization.

You need to

1. Create custom links to https://www.twitter.com and https://plus.google.com websites in the Leads module.

2. Choose a module and click the **Links and Buttons** link.

3. In the *Create Link* page, in the *Label* text box, type "Twitter" as the name of the link.

4. In the *Description* text area, type "Contains link to Twitter" as the required description.

5. In the *Construct Your Link* section, in the URL text area, type "https://www.twitter.com" as the website's URL.

6. Select **Save** to save the new link.

7. Repeat steps 1c through 1g to create a link named Google Plus to link the Google Plus website using https://plus.google.com as the URL. Provide a suitable description for the new link.

8. Assign permissions to the custom links.

9. In the Create New Link page, go to Set Permission. Select the users who should have access to the links.

Lesson I:

Templates

Lesson Objectives

In this lesson, you will:

- Learn about tyopes of templates
- Learn to customize templates

Templates

In any business organization, frequent communication takes place with external organizations and customers as part of the daily routine. Some of these business communications will be repetitive in nature; the effectiveness of such communications can be maintained by creating and adopting a standard format.

By having standard formats for business communications, there will be clear understanding and consistency in the text that is being exchanged. It will ensure that only relevant information is communicated and make it easier to track or collate the mails in the future. Zoho CRM allows you to create templates, which help you to achieve the required standardization of business communication. In this module we will discuss three types of templates: email templates, inventory templates, and mail merge.

Email Templates

Email templates are master documents that allow you to specify the standard format for emails. You can apply suitable formatting, include relevant images, and add HTML code to finalize the content of the email message. In email templates, you can include fields from the selected modules. When you create an email message based on email templates, the field values will be displayed instead of the field names.

In Zoho CRM, you can also clone, modify, and delete email templates depending on your business needs. These email templates are module-specific. For example, if you want to send an email to your contacts, Zoho will only show you the templates created for contact records.

While creating email templates, keep these points in mind:

- A template can contain a maximum of 32,000 characters.
- A video cannot be embedded in a template, but a link to a video can be included.

- When creating an email template for leads, make sure that you don't include contact-related fields. Otherwise, you'll experience errors while creating the email template.

Create New Template

You can create email templates either from scratch or from predesigned templates. All you have to do is drag and drop components onto the template to create it. An All Components panel will be available when creating a template, from which you can drag and drop the components you want. With predefined components the level of customization needed is very little. If you choose a predesigned template, all you need to do is select a template from the gallery, add the HTML codes, and save it.

View Template Analytics

The template analysis can give you an insight into the performance of each template. Whenever changes are made to the template, it is considered as a new version of the template. This lets you analyze how each version of the template has performed and gives you an idea of how well the implemented changes have been accepted.

By clicking on the analytics tab or the open rate under the stats column you can view the template analytics. A graph with the template statistics will be shown.

1. You can toggle between:

   - Open Rate: The opened rate is the percentage that tells you many times the email containing the template has been opened by the customers.
   - Click Rate: The clicked rate is the percentage that tells you how many clicks were registered by the customers for that particular email containing the template.
   - Version: The Version tab lists when a template was modified and by whom. Click on it to view a summary of the template with details such as different versions, open rate, click rate, when it was modified, and by whom.

2. You can choose to view the graph based on the Percentage, Count, or Version from the drop-down list.

3. You can choose whether you want a specific version or all versions to appear on the graph.

4. You can define the range of dates for which the data should appear on the graph.
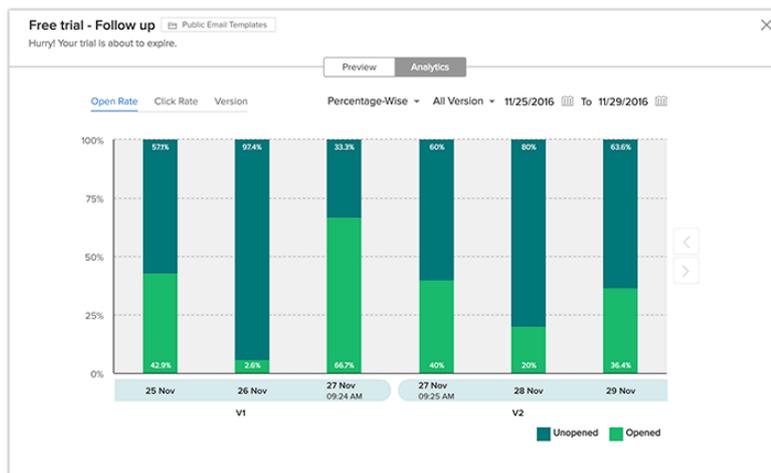
Sort and Search Email Templates

Sorting makes it easier for you to access the templates that you need, by bringing them to the top of the list. For example, you can sort the templates in such a way that the most used templates appear at the top of the list. In Zoho CRM, in addition to sorting templates, you can also search for templates.

*   You have two options for sorting templates based on time:
    To sort based on the last use time, click on the **Last Used** column. With the help of the Last Used column you can get to know which templates are used the most.
    To sort based on the modified time, click on the **Modified Time** column.
*   You can also search and filter templates based on your needs.
*   You can search for a template by its name with the help of the provided search bar.
*   Choose the module from the drop-down list to display the templates related to that particular module.

Clone Email Templates

At times, there might be slight changes that have to be made to the content of an existing template, before sending it to a customer. Rather than having to go through the trouble of creating a whole new template, you can clone the old template, make the necessary changes, and send it.

Associated Templates

There can be instances when some of the templates are associated with other CRM functions like Workflow, Case Escalation, Macro, etc. In these instances, you can view the functions with which the template is associated by clicking on the button that appears at the end of the template details. You can group together similar templates and move them to an appropriate folder. When necessary you can share the template folders with the required set of users or groups.

Use Email Templates

There are several cases where you can send emails by using the email templates. The following are ten instances in which you can make use of the email template:

- Send Mail
- Mass Email
- Schedule Mass Email
- Auto Responders
- Macros
- Workflow Automation
- Approval Process
- Case Escalation
- Webforms
- Auto Response Rules

Inventory Templates

You can use the Inventory Templates page to customize templates related to the primary inventory modules—namely Quotes, Purchase Orders, Sales Orders, and

Invoices—and create a print layout based on your business requirements. The Edit function allows you to change the print layout fields, place the company logo appropriately, enhance the look and feel of the layout, and align the list of products and services. You can create new Inventory templates by linking primary inventory modules with secondary modules. As with email templates, you can either build a template from scratch or select one from the template gallery.

Guidelines for Creating an Inventory Template

When creating an inventory template, you need to ensure that you follow certain rules that are applicable in Zoho CRM. Follow these guidelines to create your inventory template:

- The Product Name field is a mandatory field in any inventory template. It enables the listing of a product in the inventory document from the available products in Zoho CRM.
- The specific template tags for line items should be present within **<tbody id="lineItem">** and **</tbody>** tags.
- You can merge fields from other modules such as Users, Organizations, Accounts, Vendors, Contacts, and Deals**.**
- The default templates can be used in the Print Preview, Export to PDF, and Send Mail functions of the Quotes, Orders, and Invoices modules.

Other Functions in Inventory Template

As with email templates, you can perform other actions like creating template folders, sorting the folders, and cloning templates, as well as sorting and searching inventory templates.

Mail Merge Templates

The mail merge feature helps streamline repetitive tasks that are involved in the creation of customized documents, such as forms, letters, and envelopes**.** With the mail merge feature, you can create m**ail merge templates** and import templates containing merged fields. These merged fields collect data from Zoho CRM records and display them in the generated document.

For example, if you have to send out personalized letters to all contacts simultaneously, you need not type the details that correspond to each contact manually. Instead, you can create a template with the merged fields from the Contacts module and then merge the data to generate the personalized letters.

Benefits of Templates

The mail merge templates help you merge fields from Zoho CRM modules to generate personalized documents, such as forms, letters, and envelopes. While using the mail merge template, you can either create templates using Zoho Writer or import Microsoft® Word templates.

The Import Template option allows you to import Microsoft® Word documents that are no larger than 2 MB. Word documents can either be in .doc or .docx formats. You should type a brief description of the imported document in the *Description* text box. You can also select the folder in which you want to store the template. Finally, you can select the module in Zoho CRM that is needed for the mail merger.

Create Templates

You can create mail merge templates using Zoho Writer or MS Word. Let us look at each in detail:

Zoho Writer

Zoho Writer is an online word processor that allows you to create and share documents in a rich-text format (RTF). Zoho Writer lets you create mail merge documents online using Zoho CRM data from the Leads, Accounts, Contacts, and Deals modules. Some of the benefits of Zoho Writer include:

- Templates are created online and hence there is no need to download and install additional software.
- Zoho Writer can be accessed by using the single-sign on feature, which allows you to access all Zoho products with a single Zoho account login credential.
- Mail merge helps create identical documents such as invitations, forms, letters, and envelopes with data from the Leads, Accounts, Contacts and

Deals modules. These documents can be printed and mailed—or emailed—to customers whose details were merged into the documents.

- Saves time while creating multiple documents.
- Allows easy access to mail merge templates. The templates can be edited online anytime.

Import MS Word

Mail merge templates can also be created in Microsoft Word and you can import those templates to Zoho CRM. To use this functionality, you need to purchase the Zoho CRM plug-in for Microsoft Office. Please note that the data-merging feature is only supported in Internet Explorer 6 and above.

To create a template in Zoho Writer

1. Go to Setup > Customization > Templates > Mail Merge Templates.

2. In the *Mail Merge Templates* page, click **+ Create Template in Zoho Writer**.

3. In the *Create Template in Zoho Writer* window, specify the following details:

a. Enter the Template Name.

b. Enter the Description for the template.

c. Select the Folder from the drop-down list. The template will be stored in the folder that you select.
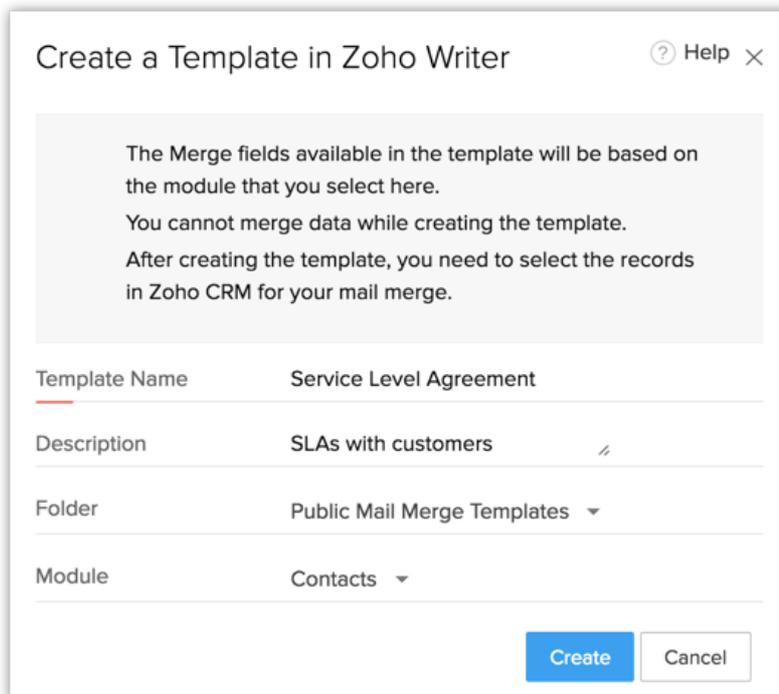
d. Select the Module for which you want to create the template.
    The merge fields in the template will be based on the module that
    you select. You can create mail merge templates for both system-
    generated modules as well as custom modules.

4. Click **Create**.

    A document will be opened in Zoho Writer.

5. In Writer, click **Tools** > **Mail Merge** >**Insert Fields** and select the field(s) that
    you want to insert.
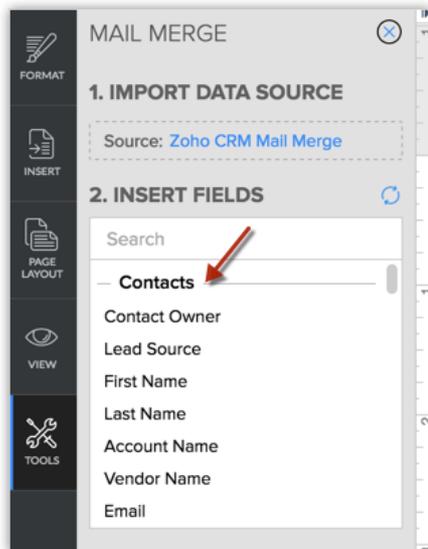
Activity I-1

Scenario

Create a new email template folder named "Email Templates" for storing the email templates.

You need to

1. On the Email Templates page, select **Create New Template**.

2. Once the email template is ready, click **Save**.

3. Select **New Folder**, enter the name of the new folder, and choose with whom the folder should be shared.

Activity I-2

Scenario

Create a new email template named "Lead Template" for welcoming new leads to the organization using mail merge.

You need to

1. In the Mail Merge select New Template.

2. Click **Create a Template in Zoho Writer**, and choose an email template folder and the Leads module from the drop-down lists.

3. A document will open in Writer. Type the text you want to use to welcome new leads.

4. In Writer, click the **insert** and **tools** fields (and **mail merge** within **tools**) as necessary.