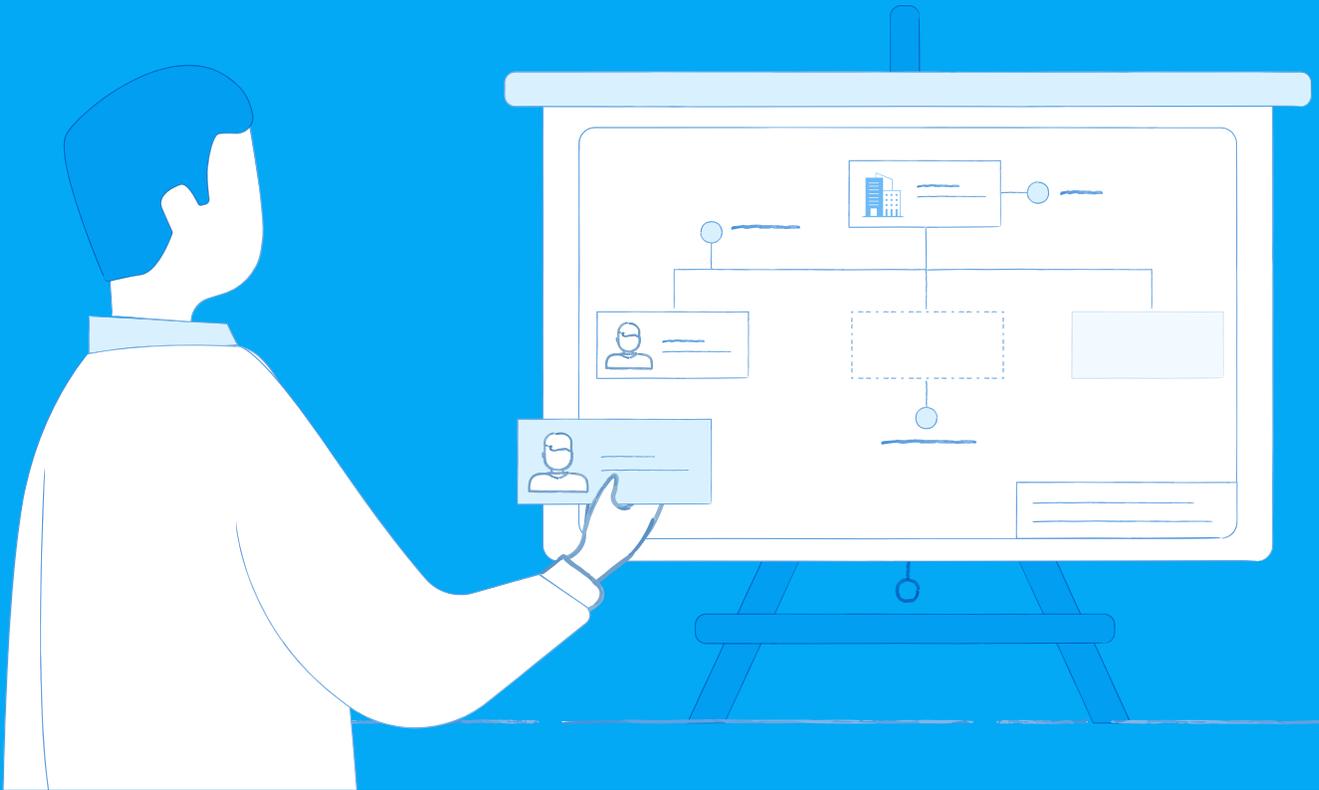


# Getting Started Workbook for Admins



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# Introduction to CRM

CRM is a one-stop solution for all the sales and marketing activities of your business. Customer Relationship Management (CRM) is not only about maintaining customer information but also increasing productivity and ensuring optimum revenue for your organization.

## You may wish to consider the following points before getting started with CRM



### Prepare your plan, process, and strategy

It is important to have a clear plan for how you are going to use CRM to help achieve your organization's goals. As a CRM administrator, you should know who your users are and what their roles are, the business and sales processes in your organization, and the kind of customization you need in CRM.



### Be ready to make changes

CRM will simplify your business's sales process. As an administrator, you need to be sure which tasks can be implemented using the CRM, e.g., automating your sales process, customizing fields. You should be ready to adapt to the changes and be open to experimentation.



### Get the most out of it

A good CRM is packed with features related to sales, marketing, inventory management, and customer relationships. You must have a clear idea of your business processes to identify the features in the CRM that can help you to achieve your business goals.



### Be open to insights, reviews, and revamps

To get the full benefit of CRM, you should review the performance insights and make changes to your business accordingly.



### Work as a team

It's not the duty of an administrator alone to manage the CRM. It should be a team effort. From sales rep to manager, everyone in the organization should be involved.

# What is Zoho CRM?

Zoho CRM is a cloud-based platform designed to manage the marketing, sales, customer support, and inventory management functions of your organization within a single system. Zoho CRM also offers various add-ons to help you integrate third-party applications.

Zoho CRM has all the necessary functions to help your organization from converting a prospective lead into a customer right through to closing a deal. CRM can be used for aspects such as tracking sales performances, understanding sales projection, automating business processes, and improving workflows and activities. A CRM can be used by people in various roles including Sales Representatives, Executives, Managers, Lead Managers, Event Managers, and Marketing Managers.



## Security features in Zoho CRM

Security features in Zoho CRM ensure complete data protection.

The **Two-factor authentication** option provides an additional layer of security by requiring you to enter an authentication code sent to your registered mobile number via SMS or phone call when you log in.

The screenshot shows the Zoho CRM user profile settings for Joe Dustin (User ID: 657941260). A blue callout box with the number '1' points to the 'My Account' link in the left sidebar. A second blue callout box with the number '2' points to the 'Security' tile in the main settings grid, which is highlighted with a larger box and contains a fingerprint icon and the text 'Two Factor Authentication'. A light blue text box at the top right of the screenshot contains the instruction: 'Enable this feature via **My account > Two Factor Authentication.**'

Zoho provides additional security features including backup verification codes, application-specific codes, and trusted browsers.

You can also set role-based security, with the administrator defining data sharing settings for each role. For example, while the administrator can access all data, a sales manager may only be able to access data related to sales. This helps you maintain data confidentiality in Zoho CRM.

## Administrator responsibilities in Zoho CRM

As an administrator in Zoho CRM, you have some initial tasks to perform at setup and responsibility for maintaining the CRM. These tasks range from configuring various entities in Zoho CRM to monitoring other users' tasks.

### Some of the Zoho CRM administrator's responsibilities are:

Configuring organizational settings, e.g., company details, fiscal year, etc.

Managing data security by assigning roles and profile permissions to restrict access to data to relevant users.

Managing integrations with other Zoho applications, Google Apps, Microsoft Office, Microsoft Outlook, QuickBooks, and Zoho PhoneBridge.

Setting up and managing different territories for your organization (this may not be applicable to all organizations).

Customizing Zoho CRM to suit the organization's requirements.

Setting up automation using options like Workflow Rules, Blueprints, and Assignment Rules.

Data administration, such as migrating data from other CRMs, monitoring file storage, and recovering space by deleting old and unwanted data.

**You can separate the tasks you perform in Zoho CRM into one-time setup and ongoing maintenance tasks:**

One-time setup tasks	Ongoing maintenance tasks
Configure personal and company settings	Manage data administration
Set security options	Handle automation of tasks and other processes inside Zoho CRM
Customize the components of Zoho CRM	Manage Zoho CRM subscription
Send invites and activate users for the organization's Zoho CRM account.	Set up and manage territories (if required)

It is important to define your organization's sales process before you start to set up Zoho CRM. You can use modules to categorize and keep track of various aspects of your business such as Sales, Marketing, Customers, Products, and Events. These appear as tabs and are either standard modules or custom (user-generated) modules.

**Some of the common standard and custom modules are listed below:**

Standard modules	Custom modules (depending upon your organization)
Leads	Insurance
Contacts	Apartments
Deals	Prospects

Standard modules	Custom modules (depending upon your organization)
Accounts	Appointments
Projects	Closures

## Zoho CRM terminology

**Business can be a minefield of jargon. Listed below are some key terms and their definitions in Zoho CRM:**



**Leads** are the raw details about unqualified contacts or sales opportunities for your business. They can be collected from web forms, seminars, advertisements, and other marketing campaigns and can be both individuals and organizations. Sales reps will follow up on leads and if they are qualified, they will be converted into accounts, contacts, and deals in Zoho CRM.



**Accounts** are the companies or departments with which your organization is currently doing business or is planning to do business. In a typical B2B scenario, accounts are very important for keeping track of important company information.



**Contacts** are the people in a company with whom your organization communicates. In Zoho CRM, contacts are often converted from qualified leads. In Business-to-Consumer (B2C) transactions, the contact is the most important information for new customers, whereas in Business-to-Business (B2B) it may be just one piece of information you have for the organization with which you are doing business.



**Deals** (opportunities) are the most important records to generate revenue in a sales organization. In a typical B2B organization, all deals will undergo a complete sales cycle, which starts with identifying a potential prospect or lead and ends when prospects are won or lost.



The **Activities** module in Zoho CRM allows you to create, organize, and associate business tasks, events, and calls. Each record contains information on the date, time, priority level, and notification parameters for the activity associated with it.



**Forecasts** are factual insights for making informed business decisions and can help you anticipate future sales. They provide a personalized, real-time view of your business for tracking and fine-tuning your sales process and an overall picture of the company's sales pipeline and the individual performances of the sales team.

## Defining your organization's sales process

It is important to define the steps required for closing a deal in your organization.

**Some of the sample stages involved in a sales process are below:**

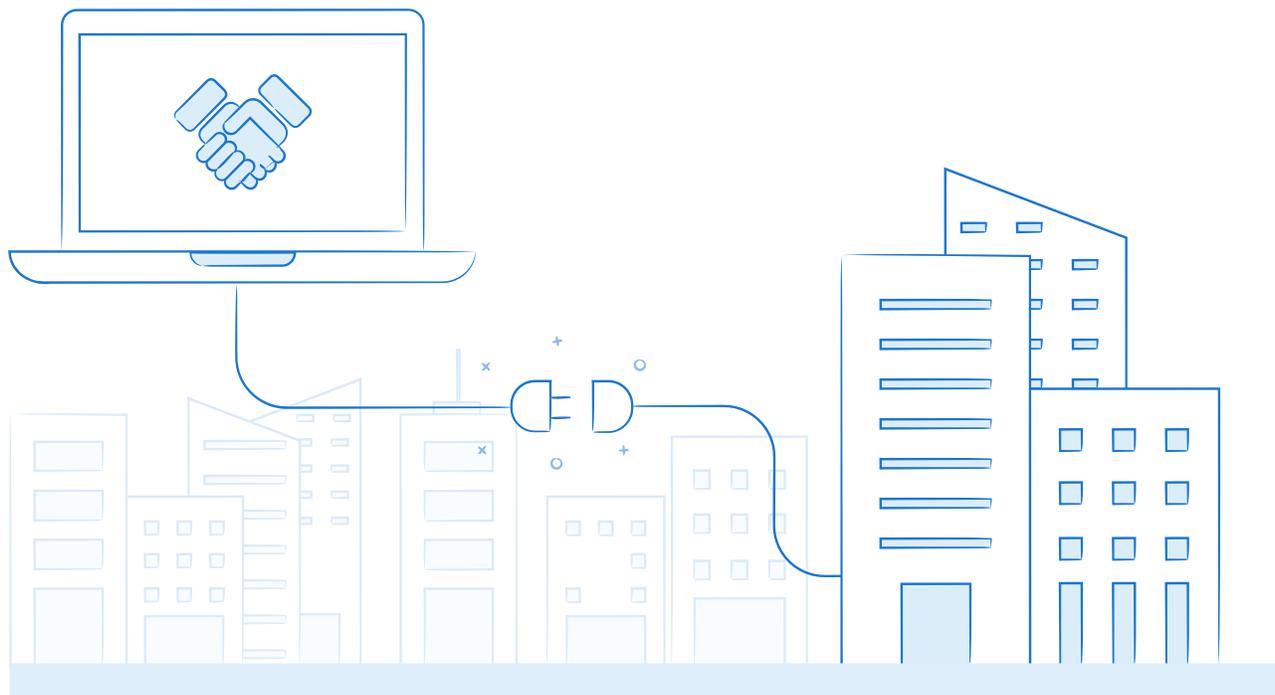
STAGE	WHAT IT MEANS
Unqualified account/contact	An individual or an organization prior to becoming a probable lead.
Lead	Details of an individual or organization received from a lead source which shows potential to become a customer.
Contact/Account	Successfully converted leads become contacts or accounts.
Deal	Generates real revenue for your organization. Will evolve through different sales stages such as Prospecting, Qualification, Needs Analysis, and Value Proposition.
Prospect Won/Lost	Based on whether the deal is successfully converted or not.

## Activity area

Use the table below to roughly define the sales process for your organization.

STAGE	WHAT IT MEANS

# Set up Zoho CRM for your organization



Every organization follows its own distinct sales process. As a Zoho CRM administrator, you will set up and configure your CRM account to suit your organization's specific requirements and ensure consistency throughout the whole process. The first step is completing the initial setup.

## Personal settings

It is important for administrators to set up their personal settings before proceeding with other organization-wide settings. You can add personal details and manage the settings in your Zoho CRM account, including defining your country locale, time zone, date format, language, etc.

To create a group

1. Go to  **Setup** > **Personal Settings** > **Account Information**.
2. In the **Account Information** page, click  **Edit**.
3. Select your **Language**, **Time Zone**, and **Country Locale**.
4. Click **Save**.

## Setup

**GENERAL**

1 Personal Settings

Company Details

Gamescope

**AUTOMATION**

Workflow Rules

Blueprint

Approval Processes

Schedules

Actions

Assignment Rules

Case Escalation Rules

**USERS AND CONTROL**

Users

Security Control

Territory Management

**CHANNELS**

Email

Telephony

Social

**CUSTOMIZATION**

Modules and Fields

Templates

Copy Customization

**Joe Dustin** Administrator ✎

CEO at - Zylker Inc

✉ joedustin@zylkerinc.net

☎

[SHOW DETAILS](#) ▾

**Social Profiles**

Twitter + Add

Facebook + Add

Google + + Add

**Locale Information**

Language English (United States) ✎

Country 3

Time Format

Time Zone

**Signature**

\_\_\_\_\_

\_\_\_\_\_

**Display Name Form**

It applies to fullname

Name format Salutation, First Name, Last Name ▾

Sort order preference First Name, Last Name ▾

**Themes**

**Locale Information**

Language English (United States) ▾

Country 2

Time Format

Time Zone Time (Asia/Kolkata) ▾

Language English (United States) ▾

Country 3

Time Format

Time Zone Time (Asia/Kolkata) ▾

Cancel 4 Save

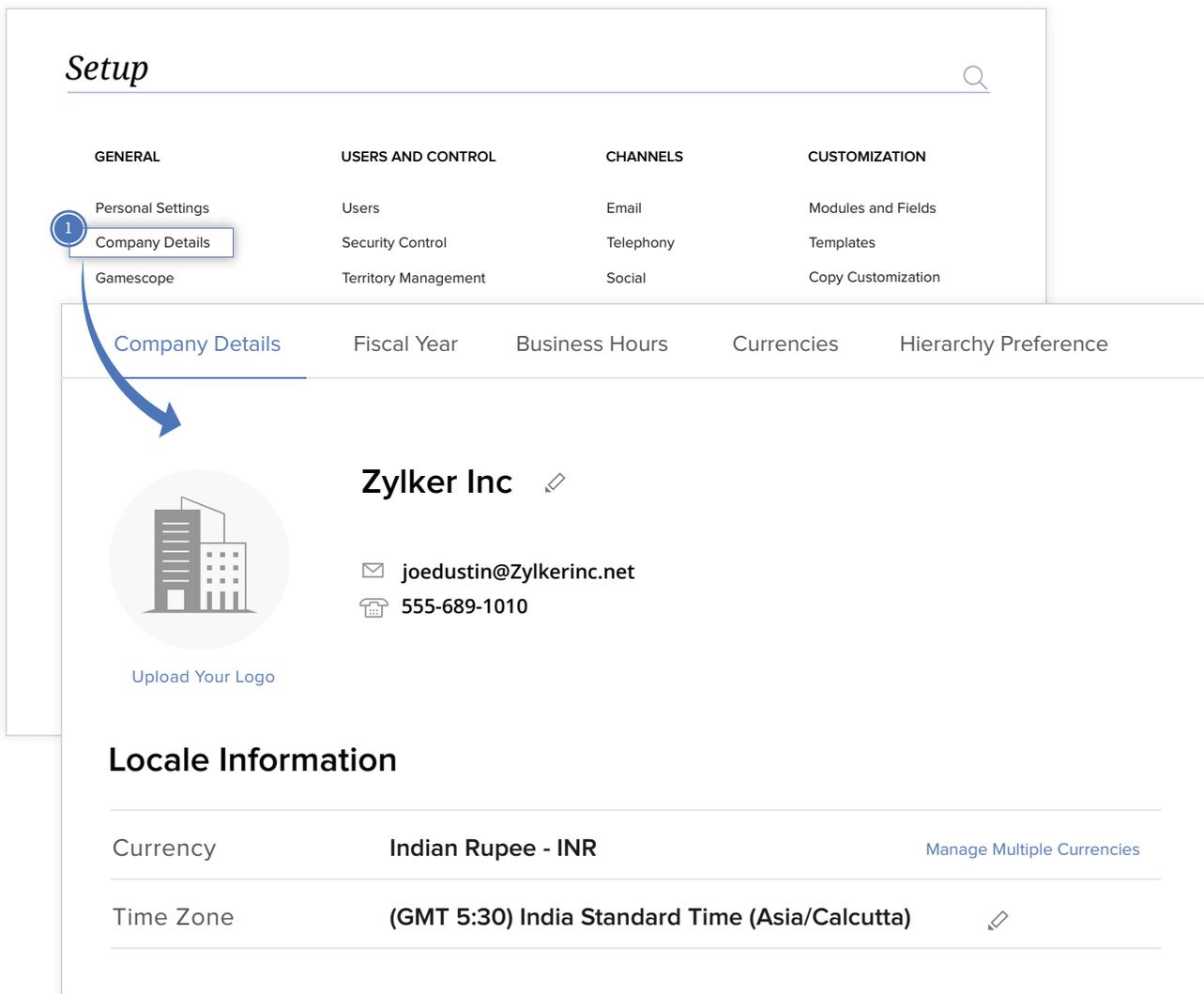
You can also set preferences, themes, and upload your signature and pictures.

## Company details

The administrator must provide these details in Zoho CRM to ensure that the organization's identity is visible across the entire application.

To add or edit company details

1. Go to  **Setup > Company details.**
2. The **Company Details** page contains five tabs:



The screenshot shows the Zoho CRM Setup interface. The 'Setup' header is at the top left, with a search icon on the right. Below the header are four main categories: GENERAL, USERS AND CONTROL, CHANNELS, and CUSTOMIZATION. Under 'GENERAL', 'Company Details' is highlighted with a blue box and a circled '1'. A blue arrow points from this box to the 'Company Details' tab in the main content area. The 'Company Details' tab is active, showing a sub-header with five tabs: 'Company Details', 'Fiscal Year', 'Business Hours', 'Currencies', and 'Hierarchy Preference'. The 'Company Details' sub-tab is selected, displaying the company information for 'Zylker Inc'. On the left is a placeholder for a logo with the text 'Upload Your Logo'. To the right of the logo is the company name 'Zylker Inc' with an edit icon. Below the name are the email address 'joedustin@Zylkerinc.net' and the phone number '555-689-1010'. Underneath is the 'Locale Information' section, which includes a table with the following details:

Locale Information	
Currency	Indian Rupee - INR <a href="#">Manage Multiple Currencies</a>
Time Zone	(GMT 5:30) India Standard Time (Asia/Calcutta) 

Update the essential details of the organization such as name, logo, time zone, country, currency.

## Fiscal Year

Set the start month for your fiscal year. The fiscal quarters are worked out automatically when you set the fiscal year.

Company Details
Fiscal Year
Business Hours
Currencies
Hierarchy Preference

### Fiscal Year

This page enables you to set the start month of your fiscal year

Fiscal Year begins in January ▼

---

## Business Hours

This option is useful for defining the working hours of teams and their time zones. The organization can have only one set of business hours.

Click the Create New Business Hour button to add your organization's business hours and determine when escalation rules are executed.

Company Details
Fiscal Year
Business Hours
Currencies
Hierarchy Preference

### Business Hours for Your Organization

Add your business hours to determine when escalation rules are executed throughout your workday.

Create New Business Hour

NAME	ACTIVE	TIME ZONE
<a href="#" style="color: #0070c0;">Shift_Day</a>	✓	(GMT 5:30) India Standard Time(Asia/Calcutta)

## Currencies

Use this option to track business opportunities with customers in their local currency.

Click [+ Add Currency](#) to add currencies and their corresponding exchange rates.

Company Details
Fiscal Year
Business Hours
Currencies
Hierarchy Preference

## Currencies

Home Currency: Indian Rupee -INR    Format: ₹ 1,234,567.89 [Customize](#) + Add Currency

	NAME	SYMBOL	EXCHANGE RATE	LAST MODIFIED BY
✓	US Dollar - USD	\$	0.016	Amelia Burrows on 12/03/2018 02:43 AM
✓	Euro - EUR	€	0.013	Amelia Burrows on 13/01/2018 19:23 AM

Only 10 currencies will be active.

## Hierarchy Preference

With this option, choose one from two different hierarchy preferences that suit your organization.

Company Details
Fiscal Year
Business Hours
Currencies
Hierarchy Preference

## Hierarchy Preference

Choose your preferred hierarchy for your organization.

**Role Hierarchy**  
It allows you to define how you share CRM data among users based on your organization's role structure.

**Reporting Hierarchy**  
It allows you to organise the people hierarchy. On choosing this, you can share CRM data according to reporting hierarchy and not role hierarchy.

Allow users who do not have a reporting manager to be managed by

Any user higher up in the hierarchy.

CEO and Administrators.

Save

Cancel

**Role Hierarchy** - lets you define how you share CRM data among users based on your organization's role structure.

**Reporting Hierarchy** - lets you organize the hierarchy and allows you to share CRM data according to reporting hierarchy. If there is no reporting manager for a particular user, you can either choose any user higher up in the hierarchy or the CEO and administrators to manage those users.

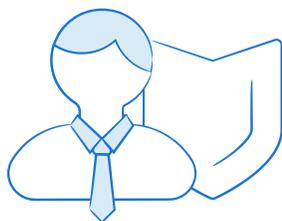
## Security control

Create profiles, roles and, define data sharing settings in the Security Control section.

### Profiles

Create profiles to manage access permissions to the CRM modules and features.

**By default, Zoho CRM provides two profiles:**



#### Administrator

Complete access to all the features and functionalities of Zoho CRM.



#### Standard

Limited access to features and functionalities.

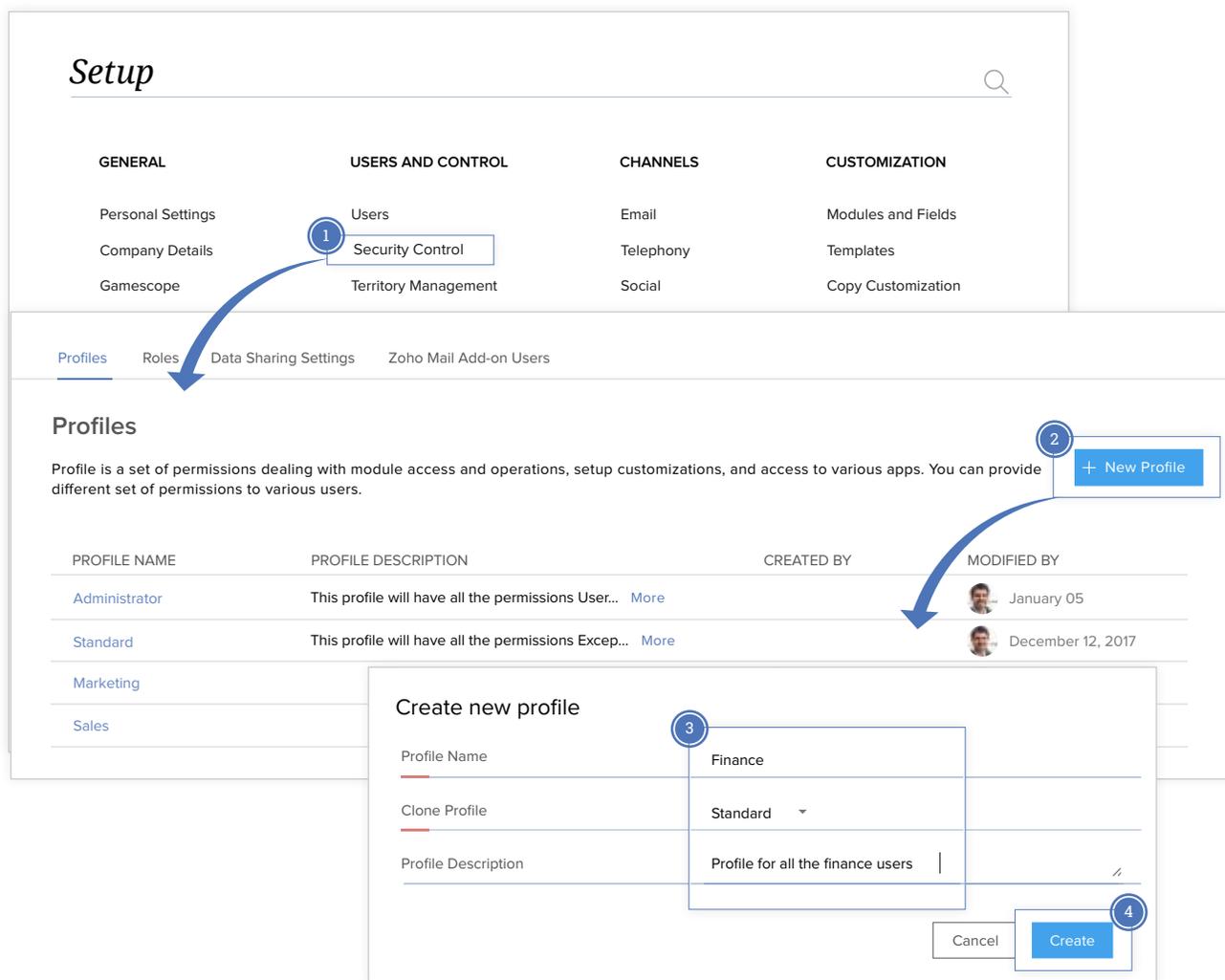
For example,

**If sales representatives in your organization should not have access to import/export records, you can create a profile with all the import/export permissions disabled.**

**Then, you can assign it to all the sales representatives in your organization.**

To create or edit a profile in Zoho CRM

1. Go to  **Setup > Users and Control > Security Control.**
2. In the **Profiles** page, click **New Profile.**
3. Enter the profile name, the profile you want to clone/replicate, and a profile description.
4. Click **Create.** The new profile appears on the list.



**Setup**

**GENERAL**  
Personal Settings  
Company Details  
Gamescope

**USERS AND CONTROL**  
Users  
Security Control  
Territory Management

**CHANNELS**  
Email  
Telephony  
Social

**CUSTOMIZATION**  
Modules and Fields  
Templates  
Copy Customization

**Profiles**

Profile is a set of permissions dealing with module access and operations, setup customizations, and access to various apps. You can provide different set of permissions to various users.

[Profiles](#) [Roles](#) [Data Sharing Settings](#) [Zoho Mail Add-on Users](#)

PROFILE NAME	PROFILE DESCRIPTION	CREATED BY	MODIFIED BY
<a href="#">Administrator</a>	This profile will have all the permissions User... <a href="#">More</a>		January 05
<a href="#">Standard</a>	This profile will have all the permissions Excep... <a href="#">More</a>		December 12, 2017
<a href="#">Marketing</a>			
<a href="#">Sales</a>			

**Create new profile**

Profile Name: Finance

Clone Profile: Standard

Profile Description: Profile for all the finance users

Cancel Create

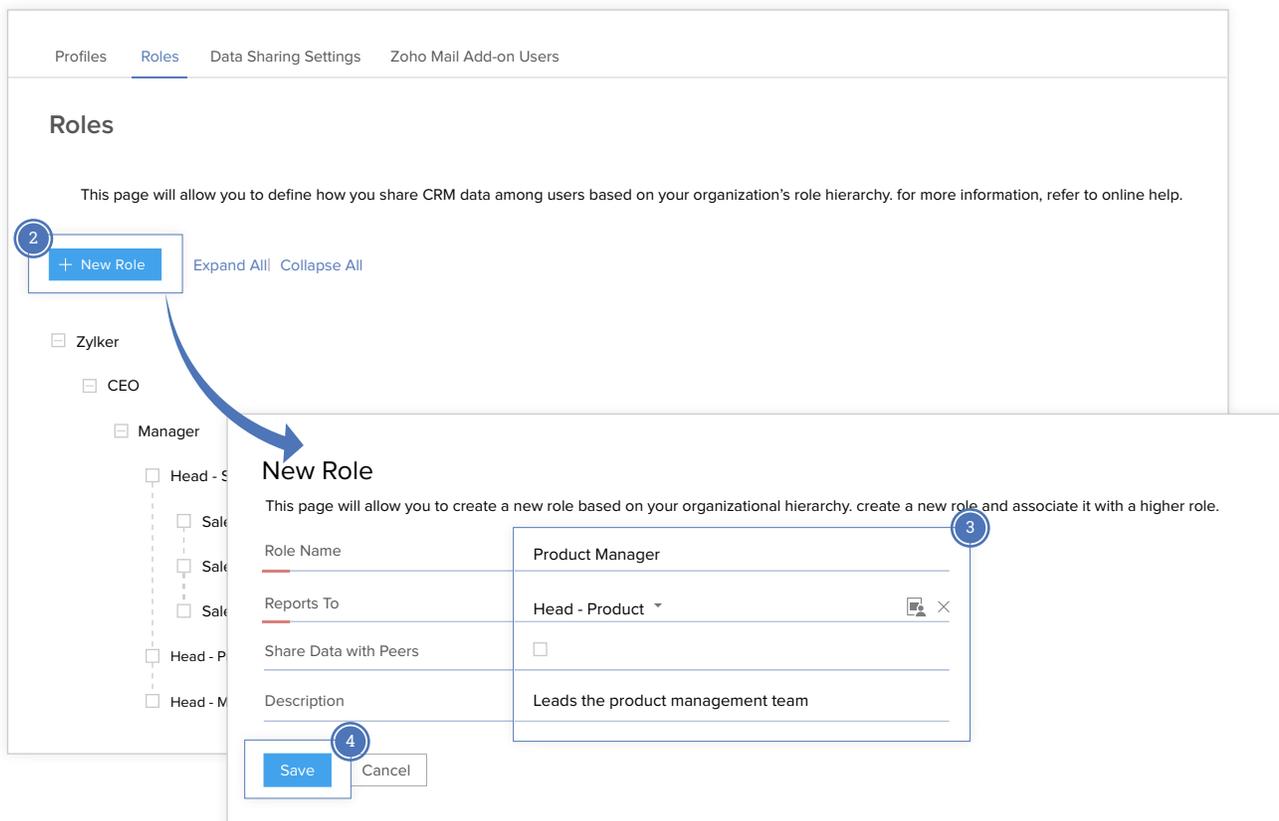
Now that the new profile has been created, you can modify its permissions by clicking on the profile name.

## Roles

Create roles and assign them to users to set up the organization-wide hierarchy. This helps you share the CRM data users need to access.

To create or edit roles in Zoho CRM.

1. Go to  **Setup > Users and Control > Security Control.**
2. In the **Roles** page, click **New Role.**
3. Enter the **role name**, **report to**, and **description** fields. You can also choose to enable or disable the option to share data with peers.
4. Click **Save.** The new role will now appear in the organizational hierarchy.



Profiles Roles Data Sharing Settings Zoho Mail Add-on Users

### Roles

This page will allow you to define how you share CRM data among users based on your organization's role hierarchy. for more information, refer to online help.

+ New Role Expand All Collapse All

- ☐ Zylker
  - ☐ CEO
    - ☐ Manager
      - ☐ Head - S
      - ☐ Sale
      - ☐ Sale
      - ☐ Sale
      - ☐ Head - P
      - ☐ Head - M

#### New Role

This page will allow you to create a new role based on your organizational hierarchy. create a new role and associate it with a higher role.

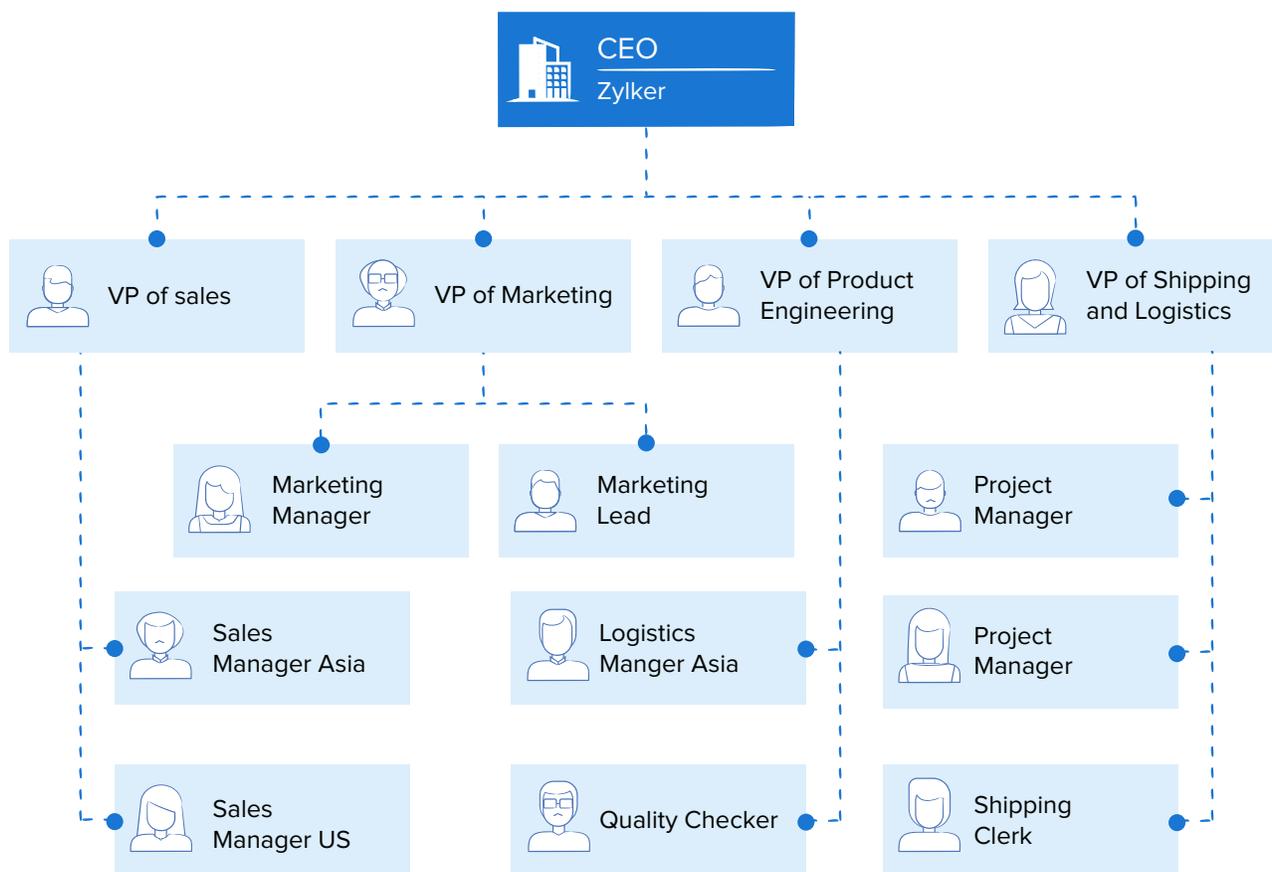
Role Name	Product Manager
Reports To	Head - Product  
Share Data with Peers	<input type="checkbox"/>
Description	Leads the product management team

Save Cancel

## Sample role hierarchy in an organization

Though most organizations have a similar hierarchy, you may also wish to customize your hierarchy by adding additional levels.

See below for a sample role hierarchy:



## Data sharing settings

Manage default sharing rules and organization permissions. To further customize your settings, you can add sharing rules, which will allow you to set up permissions between two roles, roles and subordinates, and groups.

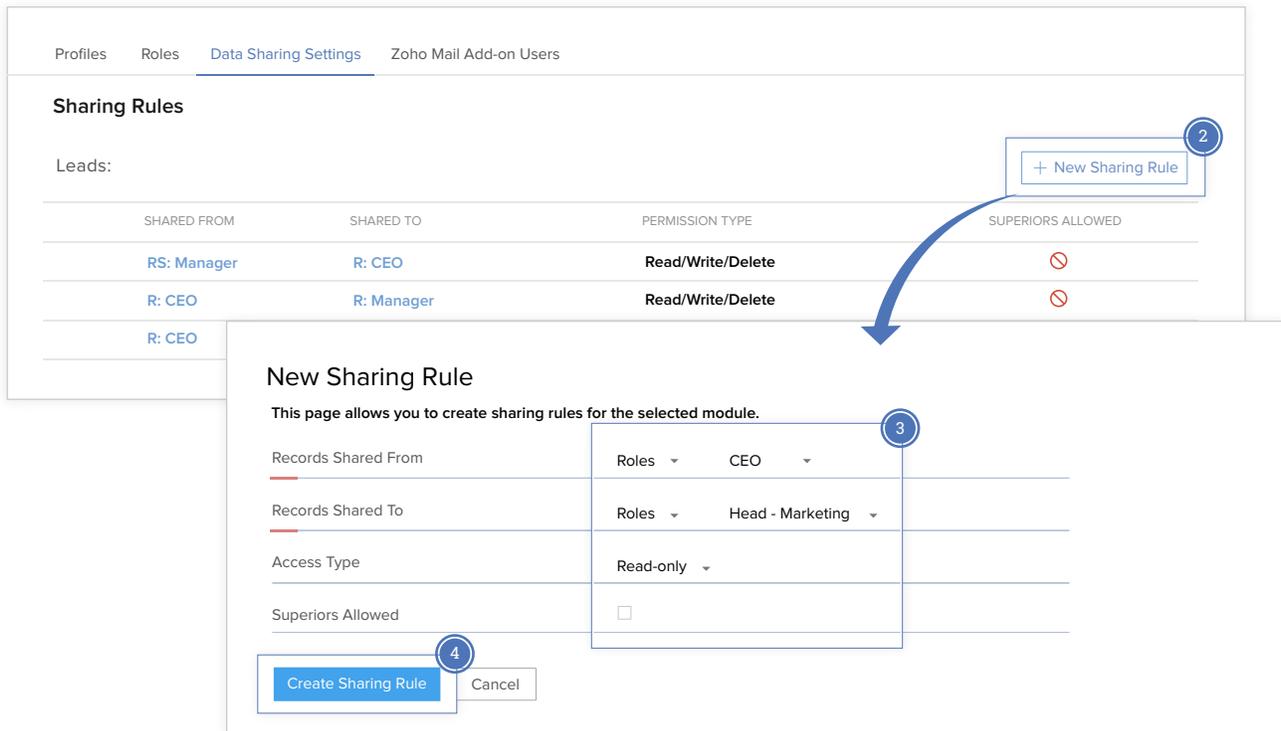
You can either click on individual modules to edit the default access permission or click **Edit All Default Permissions** to collectively edit and save them.

For example,

**A deal can be converted into an account or contact, the details have to be shared with the sales manager and they have to approve the deal. This means that only the sales manager needs the details of the deal. You can create a data sharing rule that the deals data shared by the sales rep is accessible only to sales managers and not to other users.**

To create sharing rules:

1. Go to  **Setup > Users and Control > Security Control.**
2. In the **Data Sharing Settings** page, click **New Sharing Rule** under **Sharing rules** for any module you want to create a sharing rule.
3. Choose the **records shared from**, **records shared to**, and **access type**. You can also enable or disable the option to share data with the superiors.
4. Click **Create Sharing Rule**. The new sharing rule appears in the list.



The screenshot displays the 'Data Sharing Settings' page in Zoho CRM. At the top, there are navigation tabs: Profiles, Roles, Data Sharing Settings (selected), and Zoho Mail Add-on Users. Below the tabs, the 'Sharing Rules' section is visible, showing a list of rules for 'Leads'. A '+ New Sharing Rule' button is highlighted with a circled '2'. Below the list, a 'New Sharing Rule' dialog box is open, showing fields for 'Records Shared From' (Roles: CEO), 'Records Shared To' (Roles: Head - Marketing), 'Access Type' (Read-only), and 'Superiors Allowed' (checkbox). The 'Create Sharing Rule' button is highlighted with a circled '4', and the 'Cancel' button is also visible. A circled '3' is placed near the 'Records Shared From' field.

SHARED FROM	SHARED TO	PERMISSION TYPE	SUPERIORS ALLOWED
RS: Manager	R: CEO	Read/Write/Delete	<input type="checkbox"/>
R: CEO	R: Manager	Read/Write/Delete	<input type="checkbox"/>
R: CEO			

**New Sharing Rule**

This page allows you to create sharing rules for the selected module.

Records Shared From: Roles

Records Shared To: Roles

Access Type:

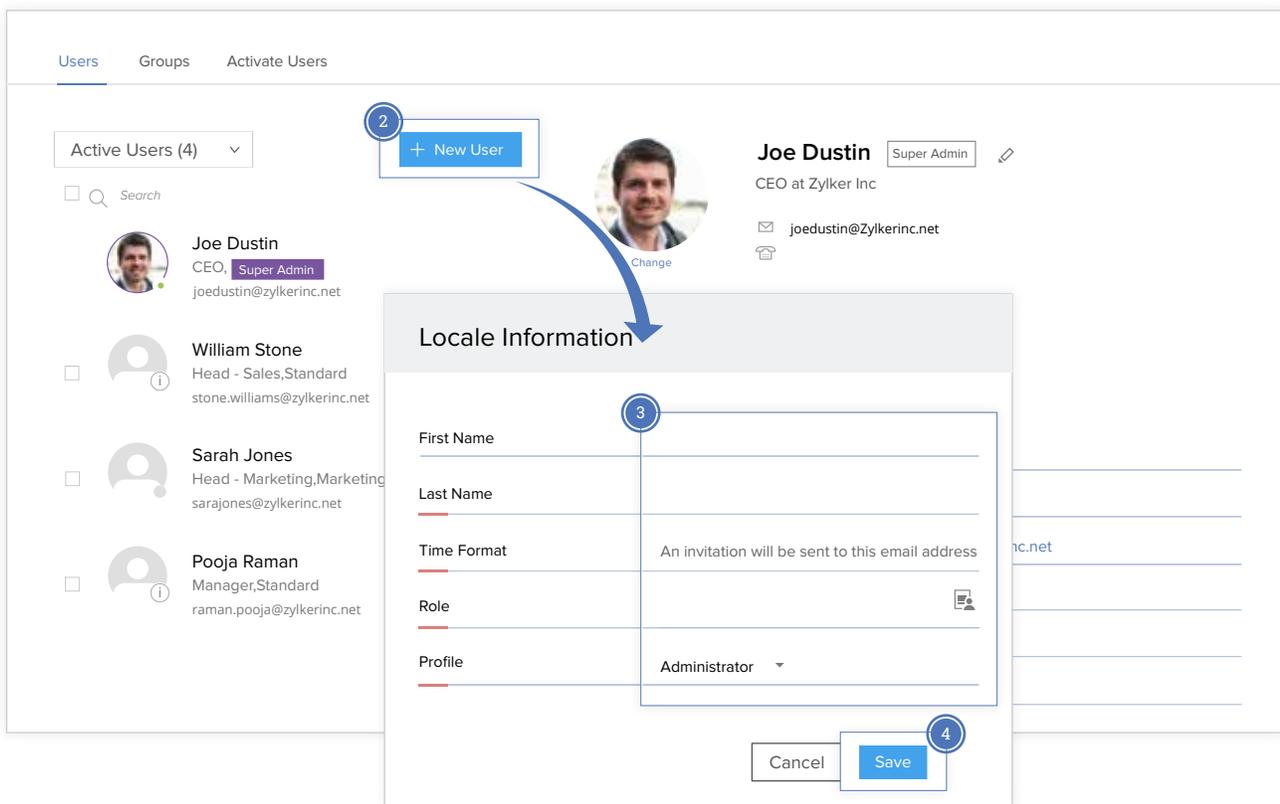
Superiors Allowed:

# Users

Add users to your CRM account and then assign them roles and profiles. For the first user that you add, only the system-defined role (CEO, Manager) and profile (Administrator, Standard) can be assigned.

To add new user(s)

1. Go to  **Setup > Users and Control > Users.**
2. Click **New User.**
3. Fill out the **detail fields** and select the **role** and **profile** for the user.
4. Click **Save.**



The screenshot displays the Zoho CRM 'Users' management page. On the left, there is a list of active users: Joe Dustin (CEO, Super Admin), William Stone (Head - Sales, Standard), Sarah Jones (Head - Marketing, Marketing), and Pooja Raman (Manager, Standard). A '+ New User' button is highlighted with a blue circle and the number '2'. A blue arrow points from this button to a 'Locale Information' form. The form contains fields for 'First Name', 'Last Name', 'Time Format', 'Role', and 'Profile'. The 'Role' field is set to 'Super Admin' and the 'Profile' field is set to 'Administrator'. A 'Save' button is highlighted with a blue circle and the number '4'. A 'Cancel' button is also visible. The form is overlaid on the user list, and a 'Change' link is visible under the profile picture of Joe Dustin.

The new user and all their details will appear on the list of users.

**The users must activate their accounts before they can start using Zoho CRM.**

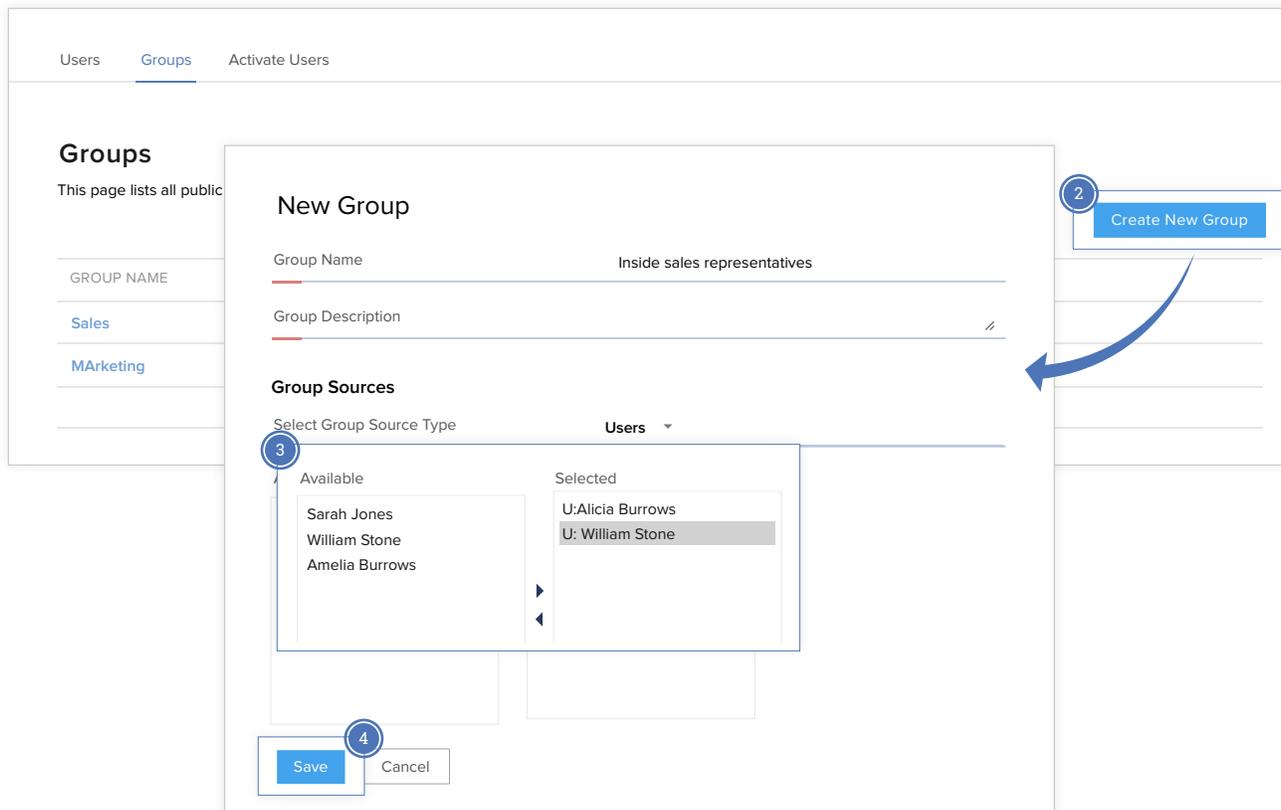
As an administrator, you can also reinvoke, delete, or deactivate a user.

## Groups

Create groups to organize users into their work domains in an organization. Groups also help you view the users' territories, subordinates, and roles.

To create a group

1. Go to  **Setup > Users and Control > User > Groups.**
2. In the Groups page, click **Create New Group.**
3. Now, enter the **group name** and **group description.** Choose the **group sources** from the list of types such as roles, groups, etc.
4. Select the items to be grouped from the list of available items.
5. Click **Save.**



The screenshot shows the 'New Group' form in Zoho CRM. The form is titled 'New Group' and has a 'Create New Group' button (callout 2) in the top right corner. The form fields include:

- Group Name:** 'Inside sales representatives'
- Group Description:** (empty)
- Group Sources:** 'Users' (selected)
- Select Group Source Type:** 'Users' (dropdown)
- Available:** Sarah Jones, William Stone, Amelia Burrows
- Selected:** U:Alicia Burrows, U:William Stone
- Buttons:** 'Save' (callout 4) and 'Cancel'

Callout 3 points to the 'Available' list, and callout 4 points to the 'Save' button.

You can view or edit the group by clicking on its name in the list of groups.

## Territory management

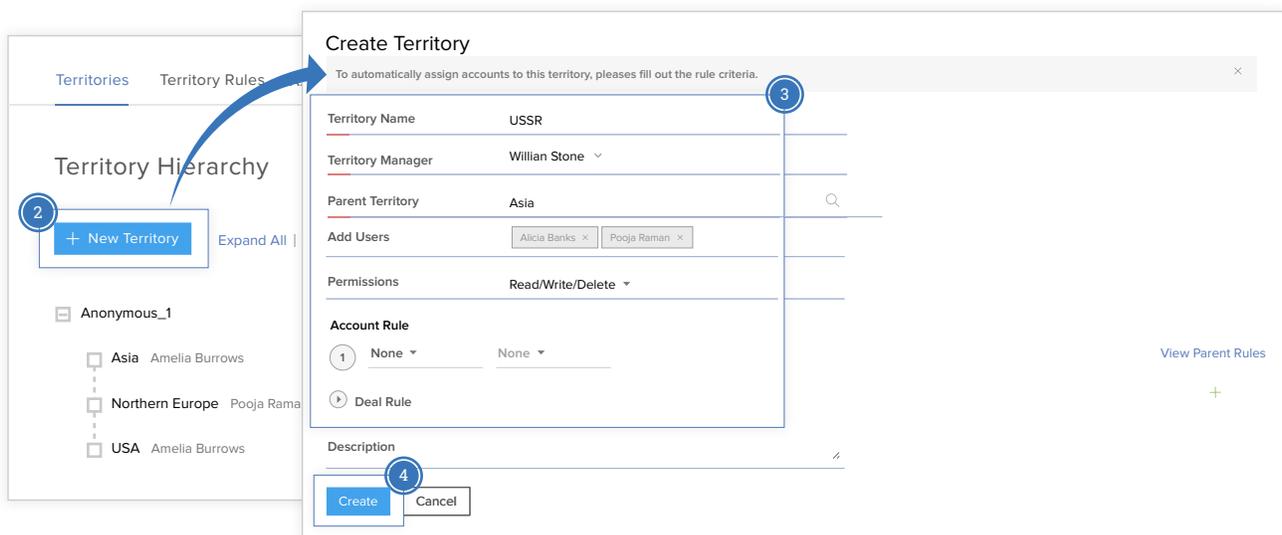
An organization can have businesses across various regions with multiple teams and departments working from different places. This situation can lead to difficulties with sharing data, tasks, events, etc., across divisions. The Territories feature in Zoho CRM helps simplify data sharing, improve existing customer relationships, and focus your sales environment.

**Note:** Territory Management is not necessary for every organization. Its necessity depends on an organization's sales process, data sharing structure, and business model

Define territories (if applicable) and assign customer accounts to sales teams accordingly. This ensures proper and efficient usage of the sales force to increase sales opportunities and provide excellent customer service.

To create territories:

1. Go to  **Setup > Users and Control > Territory Management.**
2. Click **New Territory.**
3. Enter the **territory name, territory manager, and parent territory.** You can also set **permissions, account rule, and deal rule.**
4. Click **Create.**



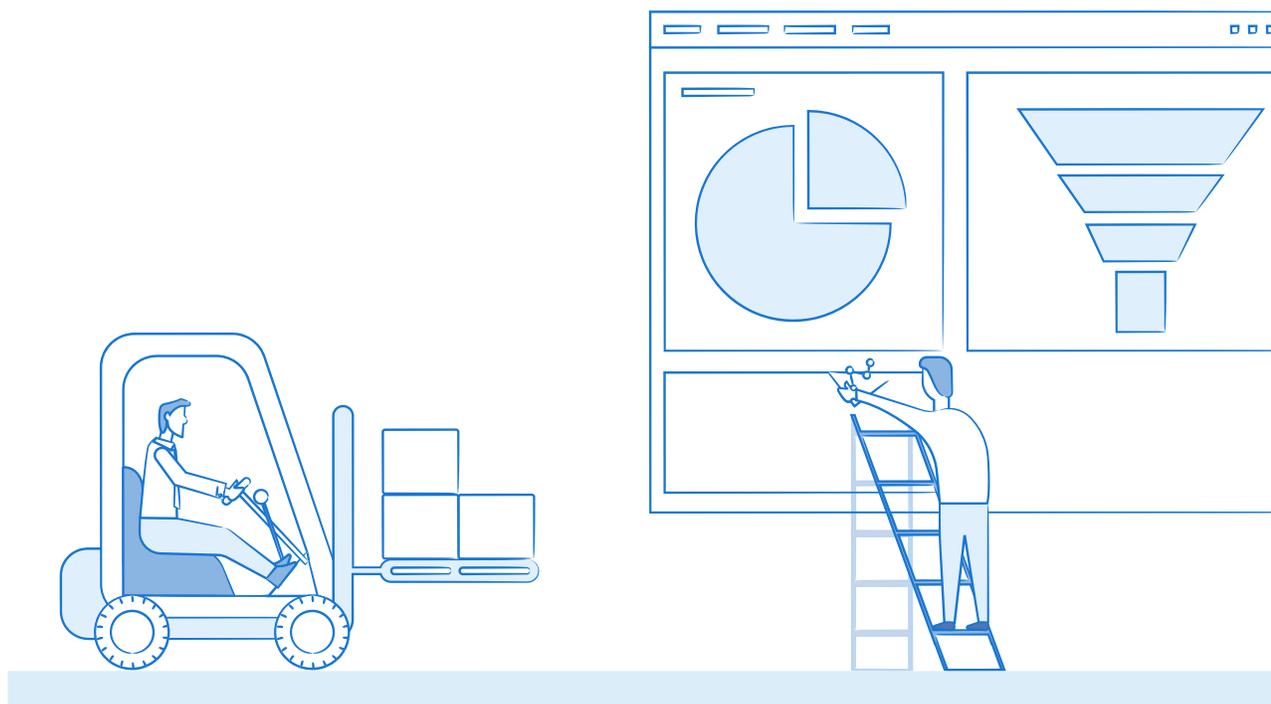
The screenshot displays the Zoho CRM interface for creating a territory. On the left, the 'Territory Hierarchy' sidebar shows a tree structure under 'Anonymous\_1' with nodes for 'Asia' (Amelia Burrows), 'Northern Europe' (Pooja Rama), and 'USA' (Amelia Burrows). A blue arrow points from the '+ New Territory' button in the sidebar to the 'Create Territory' dialog box. The dialog box contains the following fields:

- Territory Name:** USSR
- Territory Manager:** William Stone
- Parent Territory:** Asia
- Add Users:** Alicia Banks, Pooja Raman
- Permissions:** Read/Write/Delete
- Account Rule:** 1 None, None
- Deal Rule:** (with a play button icon)
- Description:** (with a text area icon)

At the bottom of the dialog box, there are 'Create' and 'Cancel' buttons. A blue arrow points from the 'Create' button to the 'Territory Hierarchy' sidebar. The dialog box also includes a search icon for the parent territory and a 'View Parent Rules' link.

The territory is now created and you can create territory rules for it in the next tab.

# Customizing your Zoho CRM account

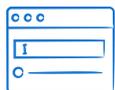


Zoho CRM has a wide array of features so it is important to customize your setup to match your organization's business process. A customized CRM will increase productivity, simplify usage by avoiding unnecessary features, and improve the CRM experience for the users.

## Some of the customization options in Zoho CRM are:



**Modules:** Categorize and track various aspects of your business such as Sales, Marketing, Customers, Products, and Events. Modules in Zoho CRM appear to users as tabs.



**Fields:** Add new fields and set their access permissions according to your requirements. These fields will be available to all users added to your organization's CRM account. You can also set field access permissions for users.



**Templates:** Zoho CRM provides various templates for quotes, invoices, emails, etc. You can also create customized templates.



**Customize Home Page:** The home page provides a quick overview of the progress of all your CRM activities. It contains components from modules such as Tasks, Deals, Dashboards, and others. You can customize what is displayed on the home page to help you see how your sales activities are progressing at a glance.

## Why is customization important?

The standard modules in Zoho CRM may not always meet all your requirements. For instance, Leads, Contacts and Potentials will not be relevant for an educational institution, and the administrator could create modules for Students, Teachers, and Parents instead. A hospital might create modules for Doctors, Patients, and Nurses.

## SCENARIO #1

Suppose your organization deals in real estate and you want to create two separate forms for commercial and residential properties and rename the modules since cases, solutions, reports, and other default terms are not applicable to your industry.

Build two page layouts for commercial and residential properties by navigating to

 **Setup > Customization > Modules and Fields > Module**

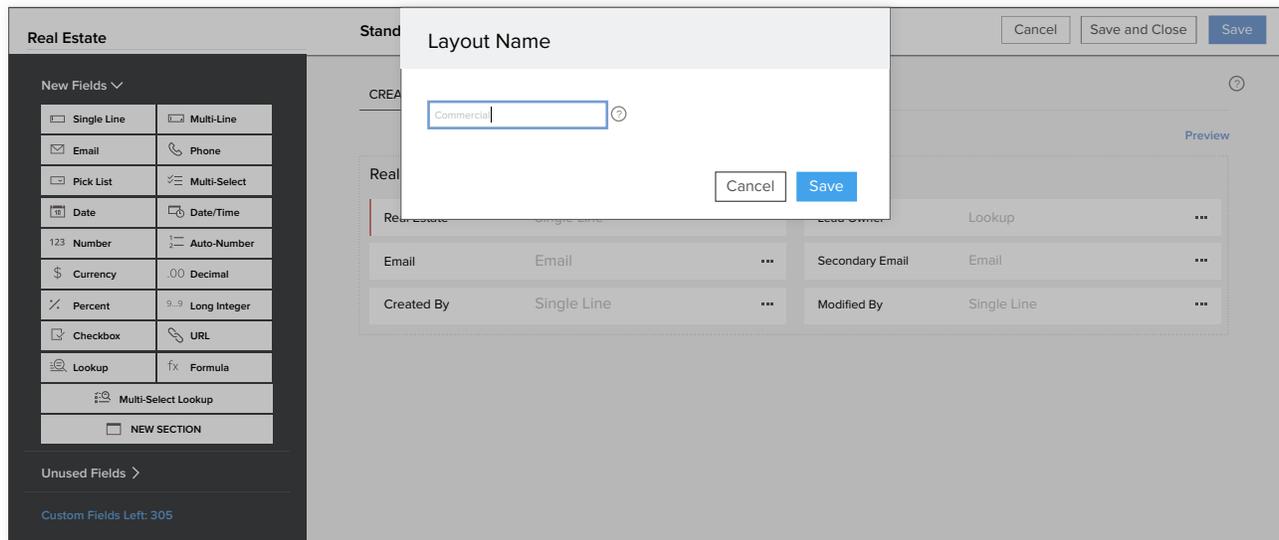
### Real Estate

Layouts    Layout Rules    Validation Rules    Fields    Links and Buttons    Summary

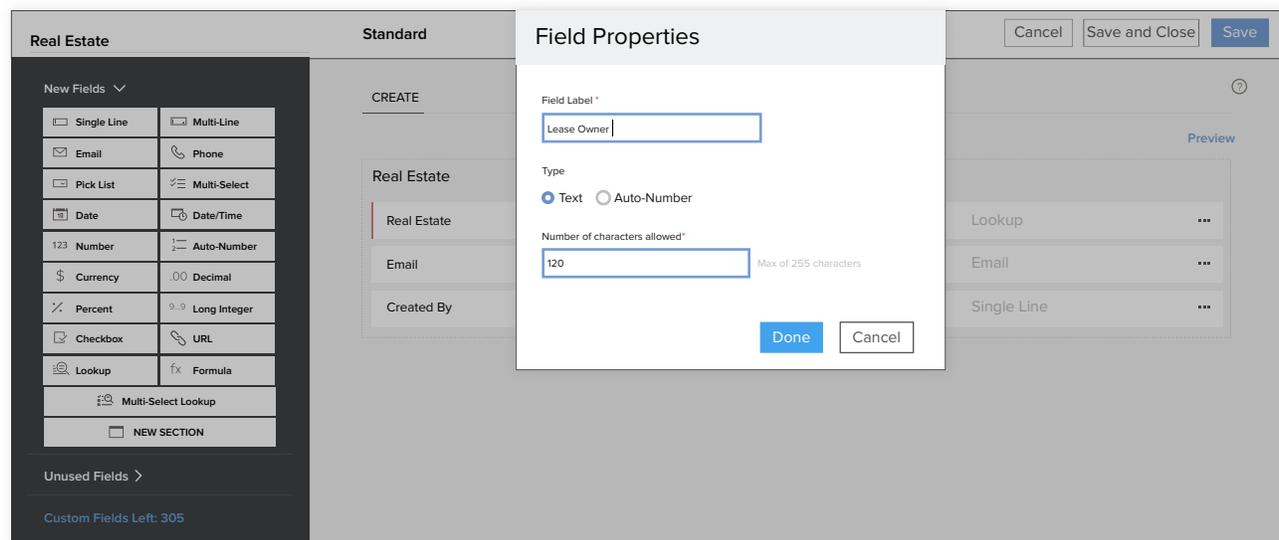
Design your own layouts to fit your business processes, then assign them to your user accounts based on permission profiles.

[+ Create New Layout](#)

NAME	SHARED TO	LAST MODIFIED	STATUS
Standard	Administrator	 March 18, 2018	<input checked="" type="checkbox"/>



Go to  **Setup > Customization > Modules and Fields** and to rename the fields related to the commercial layout (e.g., Lease owner, Rent value, etc.) and the residential layout (Home owner, Agreement, etc.).

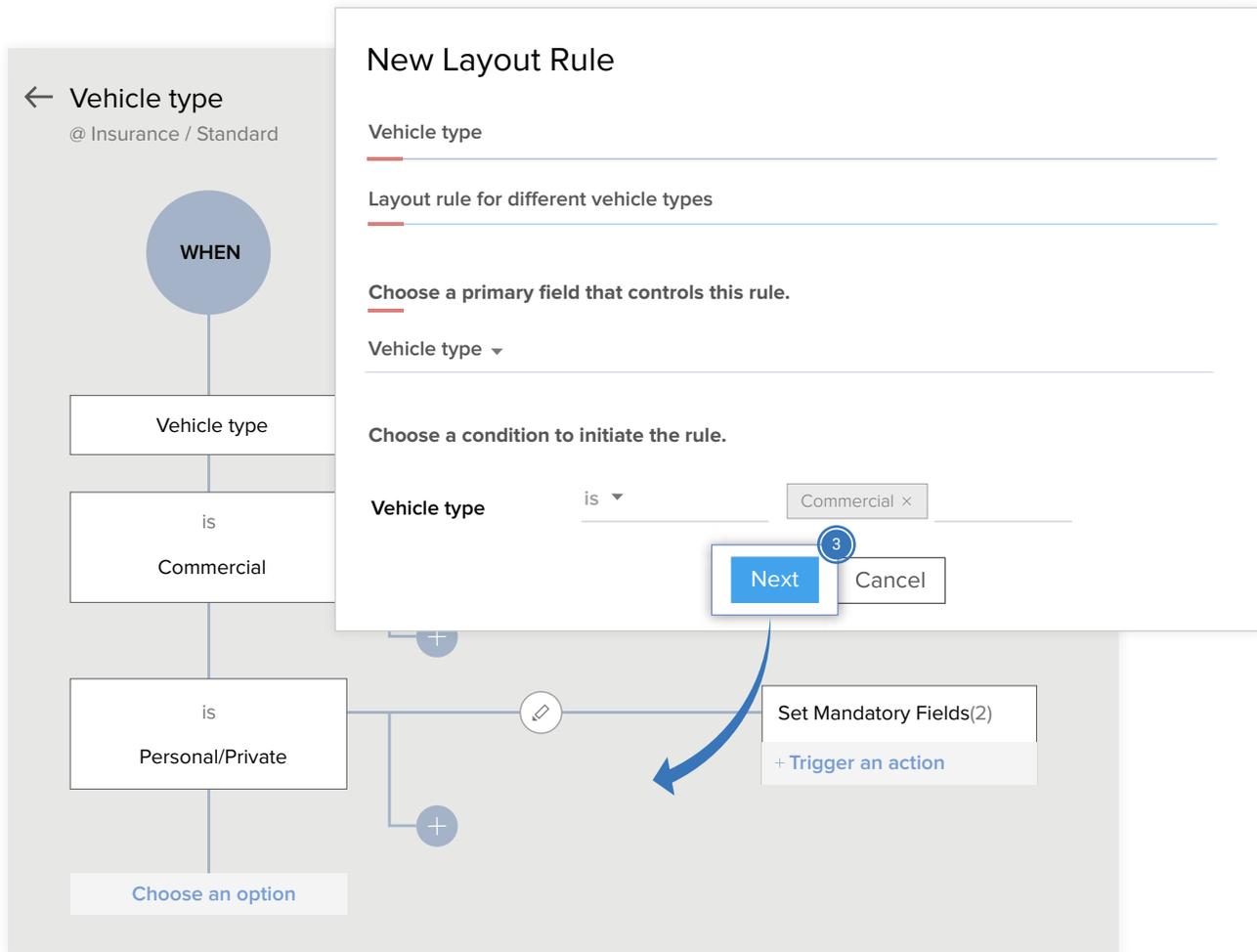


## SCENARIO #2

Your organization sells **motor insurance** (both private vehicle insurance and commercial vehicle insurance). If all the details are gathered using a single form, the form will be large and unwieldy. A customer who needs a policy for a private vehicle will also be asked for information that would only apply to a commercial vehicle.

Zoho CRM lets you handle this by creating **conditional layouts**, which allow you to keep a layout dynamic and manage the dependencies between different fields within it.

1. Go to  **Setup > Customization > Modules and Fields** and click on the **insurance module**.
2. Change to the Layout Rules tab and click the **New Layout Rule** button to specify the rule name and choose the layout.
3. When you choose the layout, an option to choose the **primary field** appears. Enter your condition and click **Next**.



**New Layout Rule**

Vehicle type

Layout rule for different vehicle types

**Choose a primary field that controls this rule.**

Vehicle type ▾

**Choose a condition to initiate the rule.**

Vehicle type is Commercial

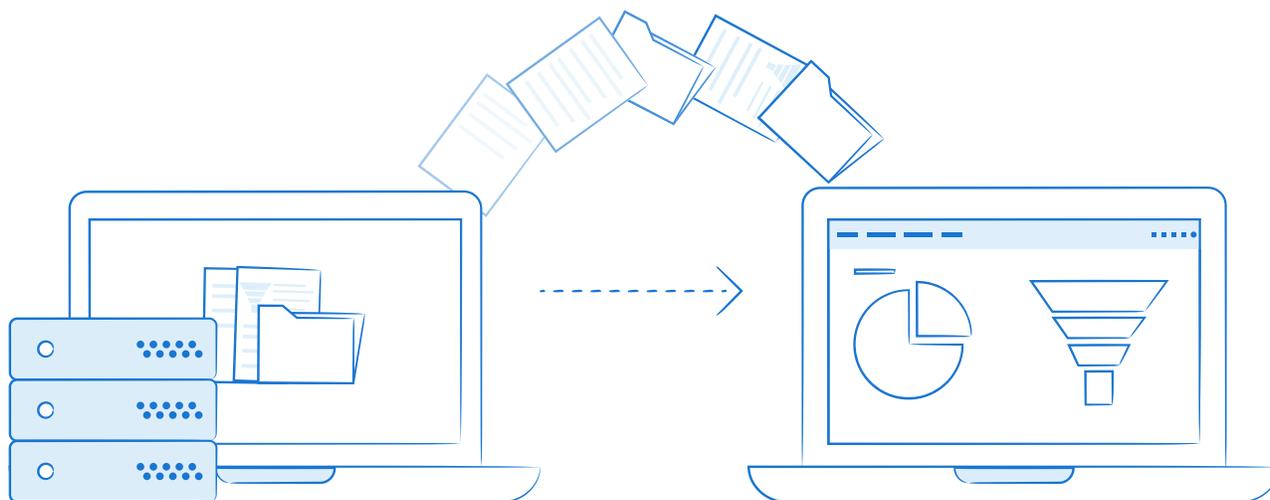
Next Cancel

Set Mandatory Fields(2)

+ Trigger an action

**To learn more about customization in Zoho CRM**  
<https://www.zoho.com/crm/help/customization/>

# Migrating data to your Zoho CRM account



As a Zoho CRM administrator, you will be able to help your sales team migrate data to Zoho CRM from other applications, back up data in case of data loss, and ensure quick transfer of data without any data loss or duplication.

**Zoho CRM provides you two options to import data from any source:**

- Import data to individual modules in Zoho CRM
- Migrate data from other accounts to Zoho CRM

## SCENARIO #1

### Data migration from other CRM applications

Your organization is in talks with another organization for a potential merger deal to widen business operations and generate more revenue. Once the merger is confirmed, you will need to transfer all data to your Zoho CRM account from the existing system of the other company. Zoho CRM's data migration wizard allows you to migrate a large amount of data from other CRM applications.

**To learn more about importing data, import checklists, and import limits,**  
<https://www.zoho.com/crm/help/data-administration/import-data.html>

## SCENARIO #2

### Importing data to particular modules

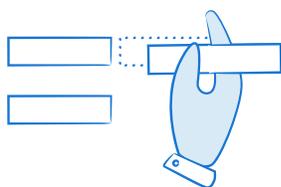
Leads in your organization may be gathered from many different sources (campaigns, surveys, web forms, etc.). Traditionally, all the lead details would have to be entered manually into the CRM. All this lead data can be imported directly into a specific module in Zoho CRM via .csv file.

## SCENARIO #3

### Gathering data from web forms

Imagine that your organization needs to collect data from people who are interested in trying the demo of your product and save it in Zoho CRM. This data will be used in the future by the sales team in the sales process.

#### In Zoho CRM, you can:



Build and generate web forms.



Specify form details



Embed the forms on your website

## Summary

This guide covered how to set up the basic features in your Zoho CRM account as an administrator.

#### The key takeaways are:

- Set up personal details and company profile details.
- Update the fiscal year, business hours, and currencies.
- Define roles, profiles, and users.
- Set up data access.
- Define and set up role hierarchy to determine who can access data.
- Territory management.
- Group users, roles, etc.
- Basics of customization.
- Data migration and gathering data from various sources.



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## Zoho CRM Resources

[www.zoho.com/crm/resources](http://www.zoho.com/crm/resources)