

Release Notes & Help Guides

Zoho CRM - 2020 Release Features



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CRM 2020 Release Notes

The 2020 feature edition of CRM brings to you everything that you need to eliminate barriers and stay relevant to your clientele. In this release we have features that helps you:

- Know your customers like the back of your hand.
- Personalize customer journeys each step of the way.
- Predict customer needs before they arise, and work smarter.

Features in this release:

Automation

Workflow for Emails

Automate a set of actions based on email status. Depending on whether the email is opened, replied, unreplied, or bounced, you can set instant actions like email notifications, field updates, or creating a task or record. You can also set custom actions using webhooks or functions.

Marketing Attribution

Measure campaign ROI and ascribe the highest value to the most deserving campaign with the help of six different attribution models: first touch, last touch, U shape, W shape, linear, and time decay.

Segmentation

Segment your customers based on their purchase patterns using the Recency, Frequency and Monetary (RFM) metrics. Understand their behavioral patterns and determine their lifetime value. Based on the insight, you can align your marketing campaigns to meet customer expectations, and focus more on retaining your loyal customers.

Customize the layout in the Calls module and Workflow Rules for calls

Add custom fields to the *Standard* layout and customize the form to suit the business requirements. It consists of four sections such as: Purpose of Outgoing Call, Outcome of Outgoing Call, Reason for Incoming Call and Call Information. These sections are dynamic and will be displayed based on the type of call.

Additionally, automate actions such as sending emails or task assignments for incoming, outgoing, missed, scheduled, or deleted calls.

Process management

Review Process

Review and validate entries made by customers before a record enters CRM. Mark the fields that you want to be reviewed and assign the records entering from webforms, APIs, or manual submissions to a set of reviewers. Also, set SLA to keep track of the delay in reviews. You can send email notifications to the reviewer and the record submitter upon approval or rejection of a record.

CommandCenter

Build and automate personalized journeys of customers, products, and services using CommandCenter. Set up states and transitions, and associate them to a set of automatic actions to conduct your journeys without manual involvement from end to end.

Customization

Multiple Sales Pipelines

Build pipelines to manage different sales processes within a layout to monitor each process and track their progress.

Wizards

Break down the record creation page into multiple screens for a clear and easy -to-understand interface. Manage visibility of fields and sections by filtering and adding only the necessary components to the screen. Use buttons like next, save, and previous for easier navigation. Allow agents to save records as drafts in CRM to revisit.

Zia

Workflow suggestions by Zia

Zia can identify any activities repeatedly performed by agents, like sending emails, updating a project's status, or allocating tasks, and will make suggestions for automating them using

workflows. After Zia suggests the workflows, you can edit them to meet your business's requirements.

Record Owner Suggestions by Zia in Assignment Rules

Zia can analyze the way records are assigned to users and interpret a pattern. She will analyze the existing record assignment pattern, the user's daily workload, and online status, and assigns the record to the best person available.

Zia for Emails (Data Enrichment, Activity Suggestions, and Email Intent)

Zia can pull customer information from email signatures and auto-populate details like company address, designation, phone number and more directly into CRM. She can suggest activities like events, tasks, or calls that are mentioned in the emails. Agents can modify and add the suggested activity based on the business's needs. Zia can also interpret the intent of an email, and label it as request, query, complaint, or others and more for quick identification.

Zia Recommendation

Zia can identify and analyze customer data, compare behavioral patterns, and draw similarities between multiple attributes to recommend the right product or service for a set of customers.

Image Validation by Zia Vision

Zia can validate images uploaded in CRM. You can upload images and teach Zia to identify different types of them. You can set actions like sending records or images for a manager's approval, or not creating a record or creating record without an image in case if it finds the image invalid.

Zia Prediction Builder

Zia can predict possible business outcomes based on existing data. For example, Zia can predict the likelihood of winning a deal or converting a lead, or chances of a product being purchased and help modify existing sales and marketing with insights.

Dashboards

Quadrant Analysis

Group your data into four quadrants based on the attributes defined in the X and Y coordinates. Each quadrant has a significance based on the attributes that one wants to measure, such as

Type of Campaign vs Revenue Generated, or Leads created vs Lead Source. This helps you determine how one parameter influences the other.

Cohort Analysis

Monitor the behavioral patterns of customers over a specific time period and get insights, like number of purchases made, the average time taken to close deals, and the highest number of products that were purchased. Use the results to strategize your selling and marketing tactics.

Marketing automation

Web Form A/B Testing

Perform an A/B test to determine which version of your webforms receives the most submissions. Run comparative experiments with different versions of webforms for selective groups of users. Depending on the results, you can publish the best performing webforms.

Web Form Analytics

Use analytics, like the number of submissions received, regions with the highest number of submissions, and which fields are most often filled out by visitors to analyze the performance of your webforms.

Mobile

Zoho CRM Analytics App

The CRM Analytics app allows you to access sales dashboards and KPIs from your phone. Agents can refer to key business metrics and share it with their colleagues or clients. The analytics app also supports Zia Voice, so you can ask Zia to show you the right dashboard.

Developer

Signals

Create your own signals and receive notifications of the events that occur in any third-party application. Trigger the signals through a function or an API, and view them in a custom-designed widget all inside Zoho CRM.

Workflow for Emails

Configuring workflow rules makes managing work much easier by automating several activities. Like, every time a record is added actions can be triggered to create and assign a task, to call the customer two days after sending the email, to send invoice if they are interested to buy the product and so on. Similarly, you can configure workflow rules to automate a set of actions based on incoming and outgoing emails.

Business Scenario

I. Automating the creation of tasks if an email is addressed to a specific sender or is not replied for a few days

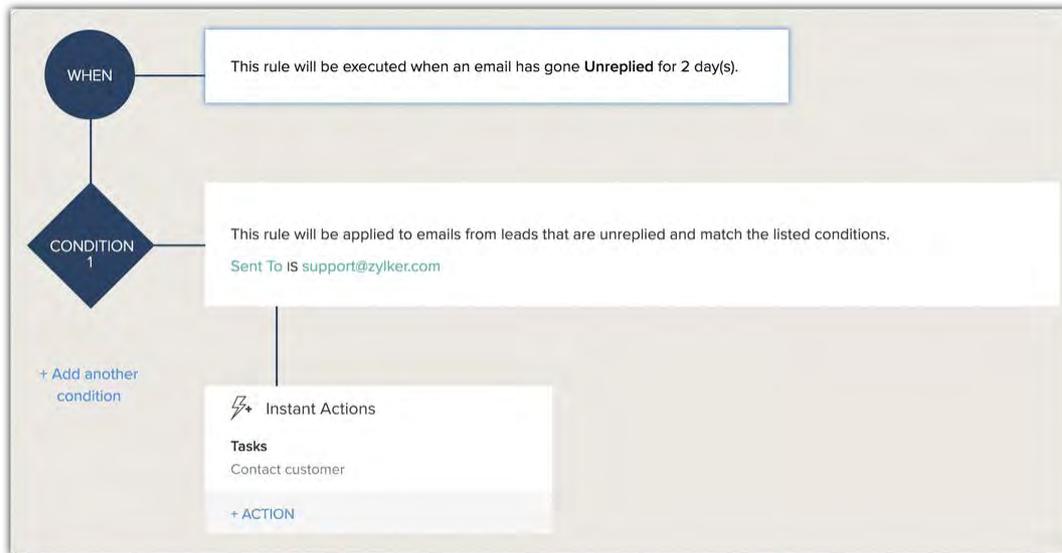
Consider this, one of your employees is unavailable for a week. During this time she receives an email from one of the customers, Mike, requesting for an urgent product replacement. Mike doesn't receive a response for two days and sends out another email addressing the Sales Manager. The email remains unanswered for one more day, following which he calls the support team for assistance. Though the issue was resolved the same day, the incessant delays caused in the interim must have left a negative impression with the customer. Such occurrences can be prevented by triggering the automatic actions through workflow rules.

These could be the conditions

- When an incoming email has not been replied for two days
- And the email is sent to support@zylker.com

This could be the action:

- A task will be assigned to the send an immediate response to the customer

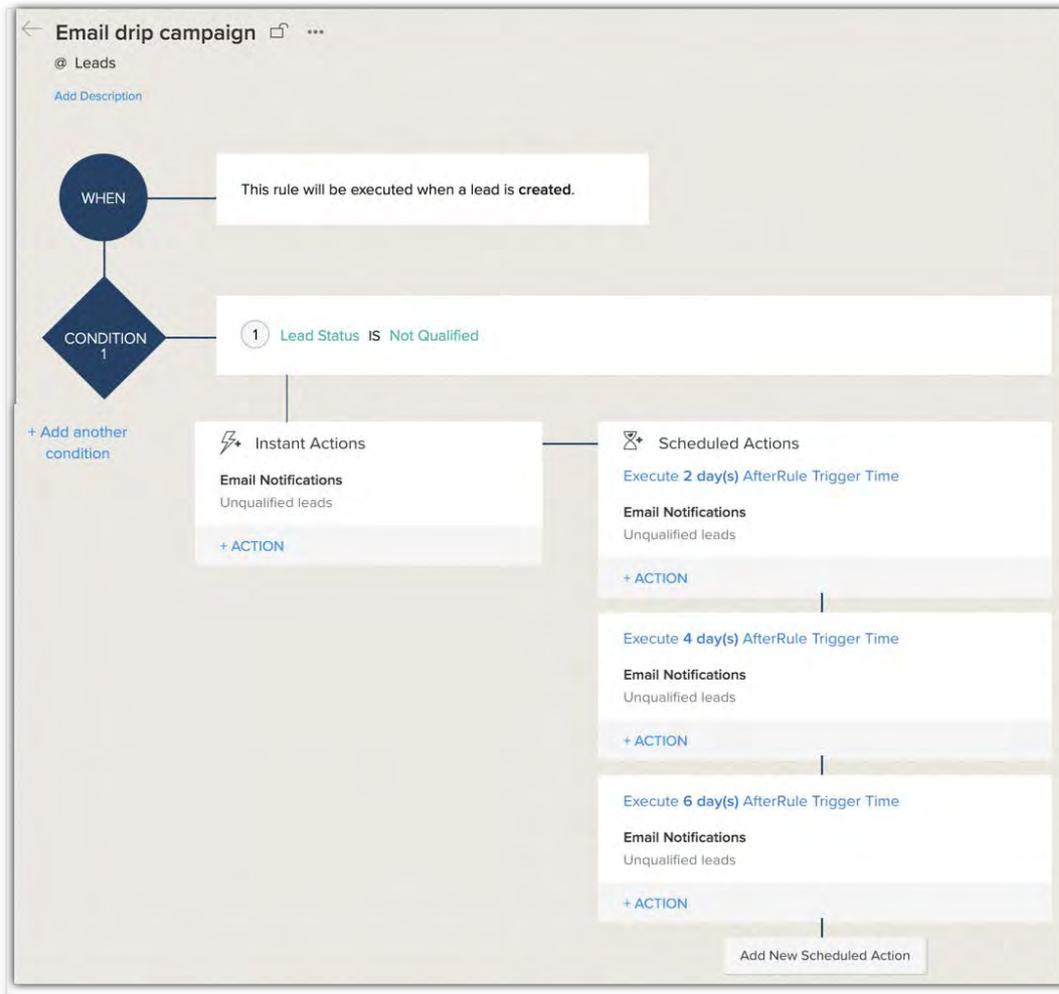


II. Stop sending automatic email campaigns to the leads that have responded to one of the email campaigns

Consider that you have set a workflow rule to send email drip campaigns every two days to the unqualified leads, and want to discontinue sending the emails once the lead responds to any one of those emails. You can create two workflow rules:

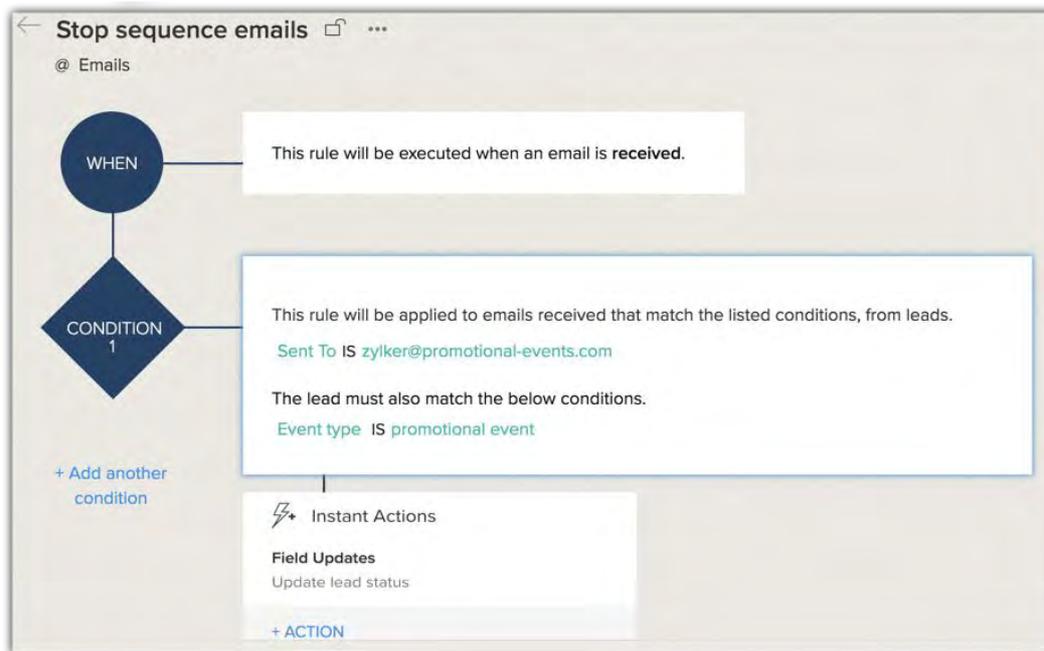
I. Workflow rule for sending email drip campaigns every two days

- Workflow rule for the Leads module. Give the condition as - when a lead is created and the lead status is "unqualified"
- Send instant email notifications
- Set scheduled email notification on Day 2, Day 4, Day 6, Day 8 and so on from the rule trigger time.



II. Workflow rule to discontinue the email drip campaign once a lead's response is received

- Set the rule for incoming emails with following conditions - emails must be sent to the zylker@promotional-events.com and the event type is promotional event.
- Set instant action as - update the lead status field to qualified



Configuring workflow rule for emails

You can set workflow rules for emails only if IMAP configuration is enabled in your CRM account. Note that we are currently not supporting workflow rule for email in Sandbox. This is divided into three parts.

Part I. Rule Execution

You can set rules for both incoming and outgoing emails. The rule can be executed for emails at different stages like:

For incoming emails - Received, Unreplied, Opened and unreplied.

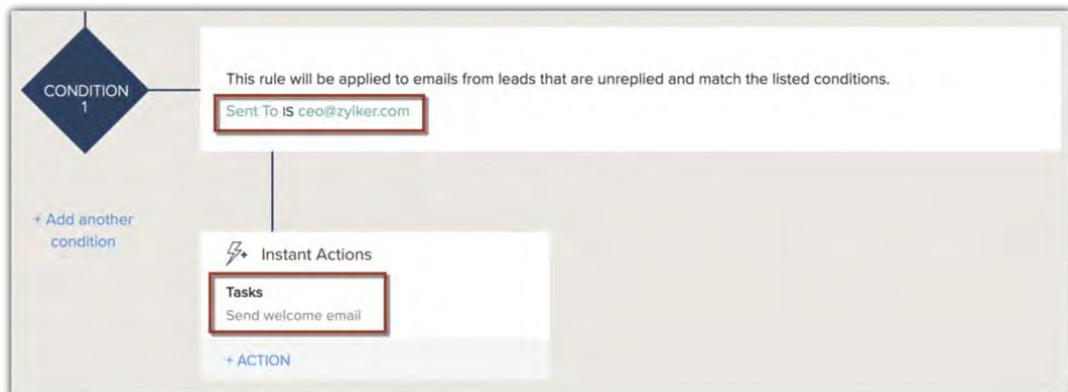


For outgoing emails - Sent, bounced, opened, clicked, opened and unreplied, unreplied.

Part II. Specify Condition

Once you have defined "when" a rule should be executed you need to specify the condition(s) that should be met for the rule to execute. You can set conditions either for a specific email field or a module.

- Based on the email field** - You can select a specific email field as a condition. For example, if the attachment contains "proposal" or if the sender is "someone@zylker.com" then execute the rule. The email fields you can choose are: attachment name, CC, sender, sent to, has attachment, and subject. Also, if you have set more than one condition, you can choose if the rule should execute when "all" or "any" condition(s) is satisfied.
- Based on the module** - You can select the module for which you want the rule to get executed. You can select Leads, Contacts, Unknown or Custom modules. You can choose an unknown module when the sender is new or not yet added to your CRM account. **Note that, if you have selected an unknown module, it is mandatory to set conditions based on email fields.** For example, you can set rules like if any email from an unknown sender is sent to the CEO's email address then certain action must be performed.



Note

- You can select an unknown module only for the incoming emails.
- The unknown sender can be added as a lead or contact in CRM. Once the sender's record is created, the subsequent emails will be considered as email received from that lead/contact. That is, the sender will no longer be considered as an unknown sender.

Part III. Specify the immediate (instant) action

You have to specify the action that should take place once the conditions are met. You can choose the following instant actions:

- Email notification
- Task
- Field update
- Create record - only for unknown
- Webhook
- Function
- Notify - via Slack or Cliq

Note

- For an unknown module only webhook, functions, and create record actions will be available. Once the sender is added as a record in CRM, you will be able to set other actions such as: sending email notification, update fields, and creating task.
- Email is not considered as a standalone module in CRM, therefore you will not be able to create tasks under **Automation > Actions > Tasks**.

To set workflow rule for emails

1. Go to Setup > Automation > Workflow Rules.
2. Click Create Rule.
3. In the *Create New Rule* page, do the following:
 - a. Select **Email** from the Module drop-down list.
 - b. Enter the Rule Name and Description.
 - c. Click **Next**.
4. Select Incoming email or Outgoing email and the condition under When you want to execute the rule?
5. Click **Next**.
6. In **Condition** do the following:
 - a. In Would you like to set conditions for email fields? click Yes/No
 - b. Mention the email fields, if you choose **Yes**.
 - c. - In **Apply this rule to**, select the module.
 - d. In Which (module) you want to apply this rule to? select All or specify the conditions.
 - e. Click **Next**.
7. Select an Instant Action.

8. Click **Save**.

The screenshot shows a configuration window for a rule. On the left, a blue diamond icon contains the text "CONDITION 1" and a link "+ Add another condition". The main area contains the following elements:

- Question: "Would you like to set conditions for email fields?" with radio buttons for "Yes" (selected) and "No".
- Text: "Apply this rule to emails matching all of these conditions".
- Condition: A dropdown menu showing "Sent To", followed by "is", and a text input field containing "ceo@zyker.com".
- Text: "Apply this rule to" followed by a dropdown menu showing "Lead".
- Text: "Which leads would you like to apply this rule to?" with radio buttons for "All Leads" (selected) and "Leads matching certain condition".

Marketing Attribution

Marketing campaigns play a crucial role in any business, as they help one ensure a better consumer reach and awareness. Most companies prefer integrated campaigns since multiple channels ascertain much better and consistent brand promotions. In general, sales and marketing cycles in any business are quite lengthy processes that last for months and it's likely that the buyer interacts with the reps several times through multiple channels during this period.

It's essential that you track and capture the touchpoints that help close the sale, understand if your campaigns are actually driving revenues and figure out the right campaign that actually moved the buyer down the decision path. This is where the marketing attribution comes into play.

Feature Availability

Available in the **Enterprise** and **Ultimate Editions**

Limits – Up to 5 models can be changed per day.

Benefits of Marketing Attribution

Let us consider a scenario.

Your company launched a new product last month and it was marketed on several platforms like social media, brochures were distributed to existing customers and partners, and display ads were put up to drive brand awareness. At the end, you notice an elevation in the overall conversion rate and a resultant increase in the revenue, however, you are clueless as to which part of the campaign was responsible for these results? or Which campaign should be credited for maximum lead generation?

Marketing attribution helps you gauge questions like these.

- It helps you map the journey of your prospects from lead to customer while taking every touchpoint and interaction into account along the way.
- Gives you a proper understanding on which marketing channels are effective and which are not. You can significantly increase your marketing efforts and invest more on the channels that are getting the best returns.

A detailed insight of this sort will give you a clear picture on help to attribute the revenue credit to the various marketing channels based on their performance.

Sales Stages in Attribution Models

Sales stages in attribution models display the stages that are commonly involved in a sales funnel. The default stages that are available in Zoho CRM's attribution models are: Lead creation, Lead conversion, Deal creation and Deal won. You can also add more stages to an attribution model based on your business sales funnel. You can choose and add stages only between the deal creation and deal won stages.

Types of Attribution Models in Zoho CRM

Zoho CRM offers six attribution models that give you better performance insights across your marketing campaigns, optimize your budget, and let you credit the most deserved campaign. You can choose only one attribution model at any given point of time. In the following section we will discuss each model in detail and help you choose the best model for your business structure.

First Touch

The First Touch model gives credit based on a single touchpoint, that is, it gives 100% of the credit or deal amount to the marketing effort that brought a visitor to your website for the first time. This model basically emphasizes the marketing campaigns that are at the top of the funnel. This model best works when your focus is solely on the lead generation and brand awareness.

Example: Say a customer signed up for a webinar after visiting your company's webpage, then participated in a survey sent through email, then converted at the end of the survey, and after a trade show the deals are closed. So, in this case, all the credit would be given to the first touchpoint - the webinar.

Last Touch

The Last Touch model is also a single touch model, that gives credit based on the single touch point. However, unlike the first touch model this model shifts all the credit to the final step in the sales cycle. It focuses on the last thing that triggered the winning of the deal while ignoring all the steps that were taken up until the deal won stage. In other words, it gives 100% credit or deal

amount to the campaign that was responsible for winning the deal. If your primary campaign goal is to generate maximum revenue, the last-touch attribution model can be useful for your business structure.

Example: Say you sent out an email campaign to your existing customers regarding a new ebook, you then send out surveys to the participants who showed interest by replying to the email campaign. At the end of the survey most of the customers are converted and after a sales call you eventually leads to deal closure. So, in this case the last touchpoint gets the 100% of the deal amount - the sales call.

U Shape

The U shape attribution model gives credit to two key touchpoints - the first touch and the last touch and any middle touchpoints that lie between the two. The first touch which represents the lead generation or initial interaction with any marketing activity is given 40% of the credit. Similarly, the last touchpoint or deal won is given another 40%. The remaining 20% is divided evenly across the middle touchpoints that occur between those two stage transitions. This model can be effective if the initial interaction with a lead is vital in your business and the last touch is important because it is directly related to deal closure.

Example: Say, your business has an impressive conversion rate but maintaining an equivalent retention rate till the sale closure is quite challenging. In such cases, the campaigns that are run after the conversion till the sale is closed and won holds more importance than lead generation. Thus, you can use the U shape attribution model and assign 40% of the revenue credit to the first touchpoint and another 40% to the last touchpoint and the remaining 20% to the touchpoints that took place between these two stages.

W Shape

The W shape attribution model is similar to U shaped, but this model includes an additional key touchpoint. The three touchpoints: lead creation, deal creation and deal won receive 90% of the credit (30% to each touchpoint). The remaining 10% of the credit is distributed among the middle touchpoints. The underlying concept of spreading the credit in this manner is to emphasize the three key funnel transitions that impact a customer's journey.

Example: If your sales cycle is longer it is more likely to be complex and include several revisits by the customers, more competitor evaluations, and multiple communication channels. To improve the accuracy of planning and budget allocation it is incredibly important to understand all the touch points that lead customers to interact with brands and move further in the pipeline,

estimate the length and the path trends of each campaign and impact of each campaign's across the funnel.

Linear

A linear attribution model divides the credit equally between each touchpoint. The first touch, last touch, and any intermediate events are all treated with the same importance. For example, if your sales journey involves 10 touchpoints, it will give 10% of the credit to each. This model gives a better and more comprehensive idea of the middle touchpoints which may be equally important in generating revenue as the first or the last touch. But, it may appear to be an idealistic model as it gives equal importance to every touchpoint, which may not be the case - it is not possible that every touch truly contributed the same amount towards the sale. To address this, we let you choose the credit weightage (on level of 1 to 4) for each campaign and also exclude the ones that you think did not have much impact on the sale.

Example: Say, you conduct a webinar and also promote your product on Twitter and get more leads from Twitter than webinar. You also observed that the conversion rate was better after the demo requests at the middle stage. The requests received from the Google Ads were comparatively more than the email invitations. Based upon these facts, you can ascribe more credit to the Twitter and Google Ads touches and invest more on these channels in future for better returns.

Time Decay

A time decay attribution model gives more credit to the recent marketing interaction. This model can work better for longer sales cycle where the early touchpoints may not necessarily be the most important touchpoints. Like, once the prospect is in the pipeline you focus more on nurturing initiatives that can incite a prospect to move further towards the sale - to an opportunity and revenue. So, instead of disproportionately allocating revenue credit to the initial stages, the time decay model gives more credit to most recent touchpoints that moved the buyer to the sale.

Example: Say, a buyer requests for a product demo right before the sale was closed. If he has also clicked on a blog post in your email a week before that, then based on the time decay model the credit weightage will be more for the product demo than the blog post, even though the blog post may have driven him into the product demo or incited the deal closure.

Customizing Attribution Model

The U and the W shaped attribution models give you the freedom to build custom attribution model that best matches the customer journey specific to your buying process. These models are more flexible and accurate as they let you allocate the percentages of revenue credit to each touchpoint and meet your own reporting criteria. For example, you know that one of your campaign that included a landing page at some middle stages played an important role in pushing the customer down the funnel, you can go ahead and assign that stage a higher percentage of the credit - like 25%, 40%, 25% distribution. Zoho CRM allows you to do three levels of customization in these models:

- By default the first, middle and last touchpoints for both the models is set at Lead creation, Deal creation and Deal Won. You can change these touchpoints based on which sales stage matters the most to your business structure.
- You can customize the credit percentages on each of these touchpoints by applying your own weighting if you know which campaign had the highest impact or the one that was more responsible for pushing the customer down the sales funnel.
- You can add more stages to your attribution model between Deals Creation to Deals Won stage if your business involves a lengthy and complex sales cycle with multiple touchpoints until the eventual sales closure.

Setting up Attribution Model

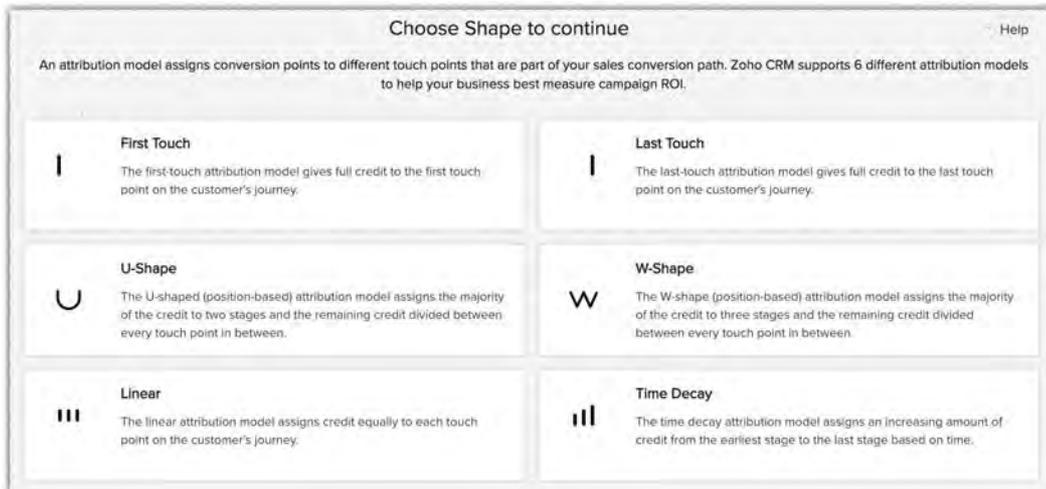
Based on your understanding of the different attribution models, your company's requirements and the touchpoints that you want to capture, you can choose an appropriate model for your organization.

Note

- If you are setting up the attribution model for the first time, Zoho CRM will calculate the ROI based on the past two months of data.
- You can choose only one attribution model at a given point of time. Whenever necessary, you can change between the models and in a day you will be allowed to change upto 5 models.
- You can add sales stages to the U and W shaped models only from the standard layout of the deals module.

To set up an attribution model

1. Go to **Setup > Automation > Marketing Attribution**.
You will be redirected to the attribution models page.
2. From the *Choose Shape*, select the desired shape.



3. Click **Save**.

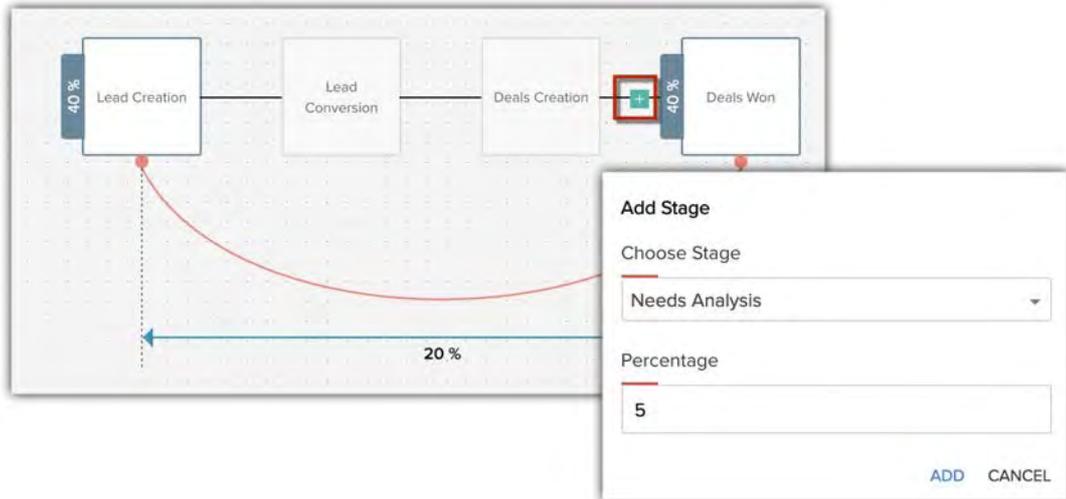
Add Sales Stages

By default, the U shape and W shape models include the lead creation, lead conversion, deal creation, and deal won stages. However, you can customize the model and add additional stages after the deal creation stage. You can also specify the weightage of each of those stages.

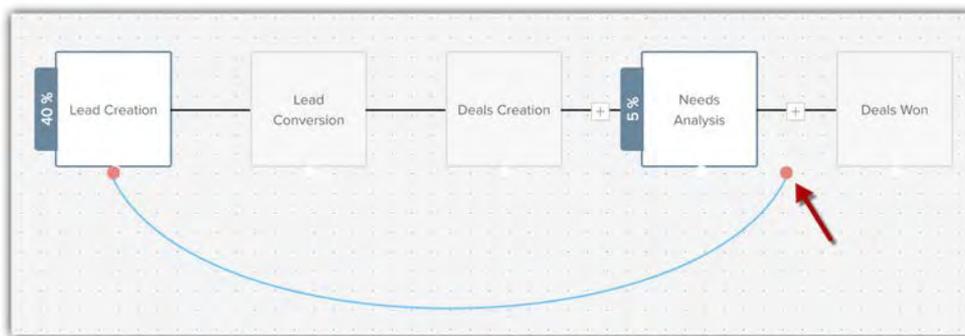
To add sales stages

1. Select **U** or **W** shape model.
2. Click the **Add** icon, after the *Deal creation* stage.
3. In the *Add stage* popup, choose a **Stage** from the drop-down list and enter value for **Weightage**.

4. Click **Add**.



5. Click the *Add* icon to add more stages.
6. Drag and drop the line between the stages to define the last stage for ROI calculation.



7. Click **Update**.

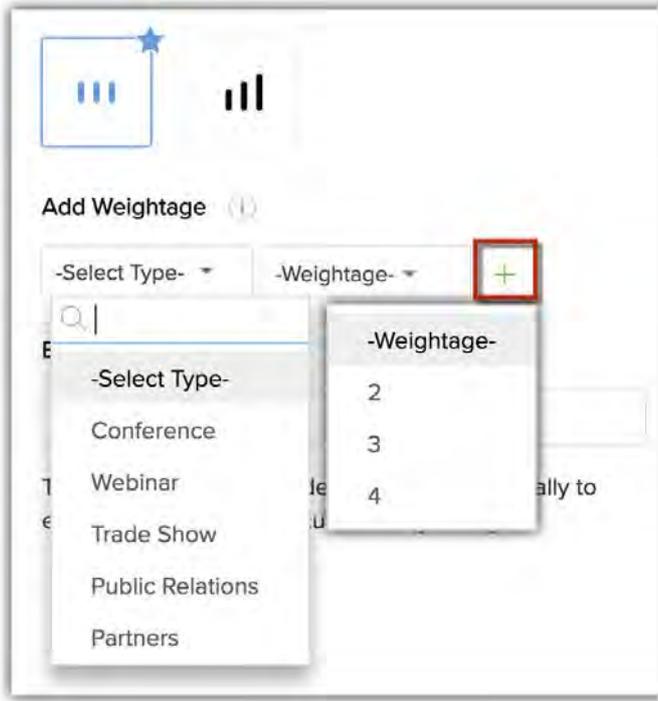
Customize Weightage and Exclude Campaigns in Linear Model

Only for the linear model there is an option to define the weightage for each campaign. The revenue will be ascribed to the campaigns based on the value that you enter. Also, you can exclude those campaigns that you think did not have major contribute on winning the deal.

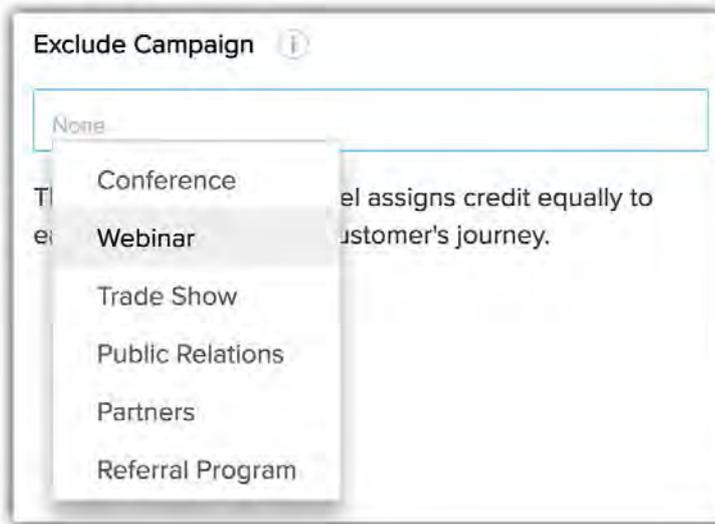
To select weightage and exclude campaign

1. In the *Linear model* go to **Add weightage**.
2. Select the **Campaign** from the drop-down list.

3. Select the **Weightage** from the drop-down list.



4. Click **Exclude Campaign** and select the desired campaigns.

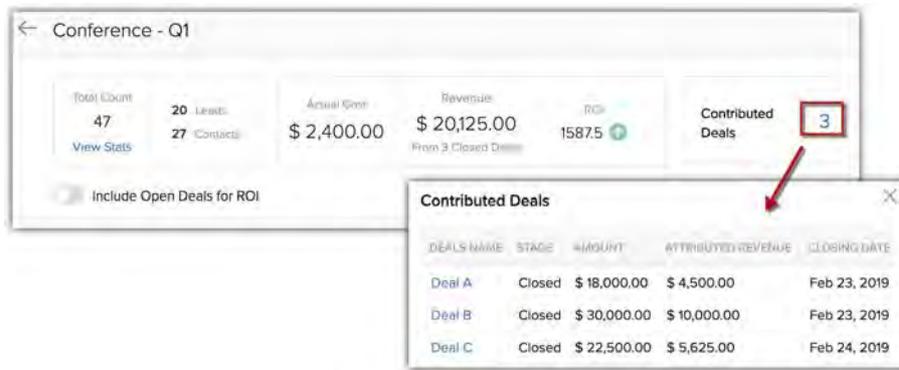


5. Click **Update**.

View Number of Contributed Deals

In Campaigns record detail page you can view the entire statistics of the campaign like the number of leads or contacts that participated in the campaign, generated revenue, ROI value, and the number of deals that contributed towards that ROI.

The ROI is calculated by taking only the closed deals into consideration. However, you have the option of including the open deals too. You can toggle on **Include Open Deals for ROI** from the record's detail page.



View Marketing Attribution Reports

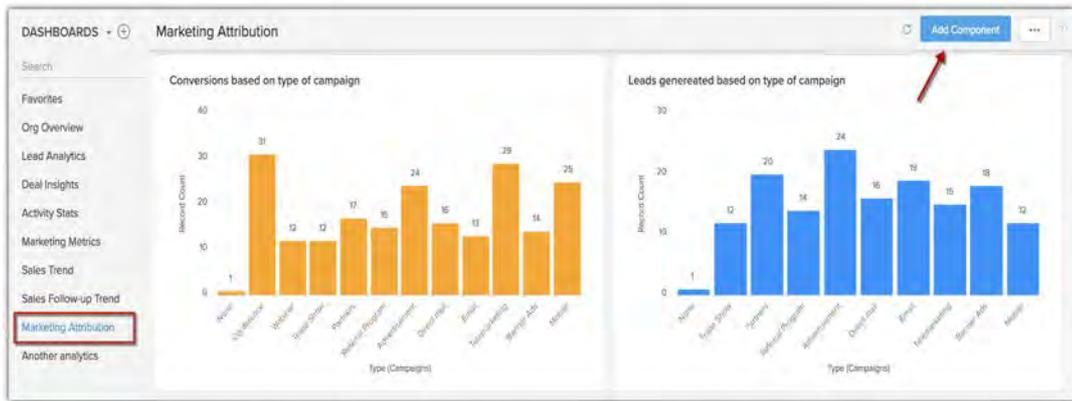
Once an attribution model is set up, a dashboard will be added to the Analytics tab in CRM. Zoho CRM provides a set of reports by default, however you can include additional components as per requirement. Below is the list of reports that are already available:

- Campaign with greatest ROI (Yearly)
- Top revenue generating campaign
- Leads generated based on type of campaign
- Conversions based on type of campaign
- Revenue generated based on type of campaign
- Compare revenue generated with previous Month
- Compare conversions with previous quarter/year
- Compare leads generated with previous quarter/year

To view attribution reports

1. Go to the *Analytics* tab.
2. Click **Marketing Attribution**.
The default dashboard will be displayed.

3. Click Add Component.



Segmentation

Customer segmentation is the process of categorizing ones customer base based on common characteristics such as the region, industry, product preference, revenue generation etc. It serves as a powerful technique that helps companies to resonate better with the customer's needs and behavior and also use the information to market each group effectively and appropriately.

Significance of segmentation based on purchase pattern

Segmenting customers based on a single characteristic or parameter may sometimes limit the vision and cause misinterpretations by analyzing the entire customer base as a single entity.

For example, if you segmented your customers based only on the total revenue that is generated by them, and deduce that the one's who fetch the highest revenue are the best for your business, the information may only be partially true. Because, you don't know how many times these customers have bought from you? When was their last purchase? Are they returning? How frequently do they purchase? What if most of them bought only once?

It is these responses, that will help you guide them towards the next step, suitable product, best offer or next purchase. For example, you can send announcements of "premium features" only to those customers who frequently buy from you and also spend a good amount, as they will more likely be interested in upgrading. Analyzing the customer behaviour based on their previous purchases will help you determine a better customer retention strategy.

RFM metric for post-purchase segmentation

The most common metric that is used for a post-purchase segmentation is the RFM metric. It evaluates the customers based on the recency, frequency, and monetary values.

- Recency - When was the last time they purchased?
- Frequency - How frequently did they purchase?
- Monetary - How much did they spend?

These metrics help you to segment the customers into homogeneous groups, understand their traits based on past purchases, and engage them with more personalized campaigns.

Feature Availability

This feature is available in the Enterprise and Ultimate editions

Limits:

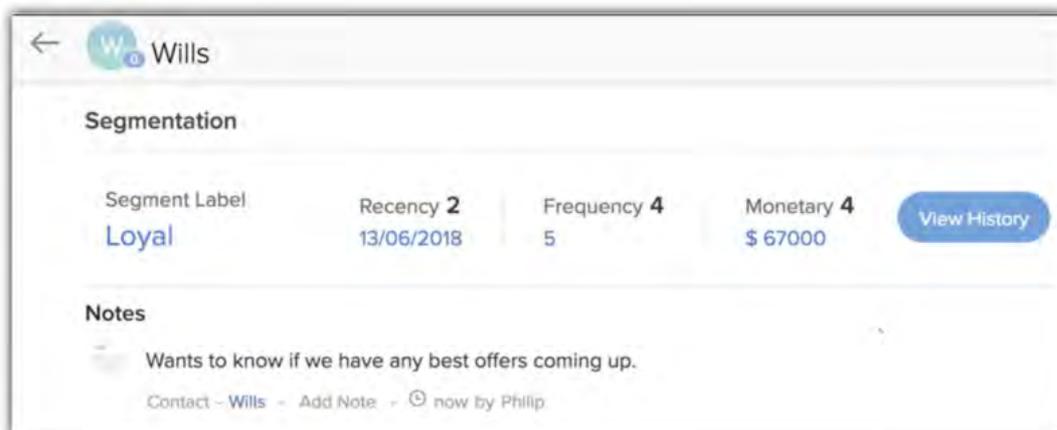
- **Enterprise** - 13 segmentation (includes the segmentation that are unpublished or saved as draft)
- **Ultimate** - 25 segmentation (includes the segmentation that are unpublished or saved as draft)

Segmentation in Zoho CRM

You must select the appropriate fields that represent the recency, frequency, and monetary values in your business and give a score ranging between 1-5 for different levels of RFM metric. For example,

- If the last purchase date is last month, the recency score can be 2.
- If the total number of products purchased is 5, then the frequency score can be 4.
- And, if the total amount of purchase is above \$60000, the monetary score can be 4.

Based on the scores that you set, the system will compute the RFM metric for the record (customer/contact/prospect) and display it in the records detail page.



Note

The RFM and the segment label fields will currently be shown only in the Standard modules.

Labeling the segments

You can create different labels based on the RFM scores of the customers, this will also help the other teams to understand the customers position in the sales cycle and take appropriate actions. Each segment can have up to 8 labels, and for ease of understanding Zoho CRM gives a set of predefined labels, which are:

Segment Label	RFM scores
Champion	R: 4-5 F: 4-5 M: 4-5
Loyal customer	R: 2-3 F: 4-5 M: 4-5
Recent customer	R: 1 F: 4-5 M: 4-5
Promising	R: 3 F: 1-2 M: 1
Customer needs attention	R: 2-3 F: 2-3 M: 2-3
About to sleep	R: 2-3 F: 1 M: 2-3
Cannot lose them	R: 1 F: 4-5 M: 4-5
Lost customers	R: 1 F: 1 M: 1

You can edit these predefined labels or delete them and add new labels such as:

Segment label	Factors influencing the RFM scores	RFM score
Must be pursued	<ul style="list-style-type: none"> The last visit dates back to above six months Not visited in the past six months Usually spends good amount 	R: 2 F: 1 M: 4
Seasonal visitors	<ul style="list-style-type: none"> The last visit was a year back Used to visit one a month Spent very less 	R: 1 F: 4 M: 2

Configuring segmentation

You can create segmentation in both standard and custom modules. The key factors that you should decide before configuring segmentation are:

1. **Module that should be segmented** - The module for which you want to configure the segmentation, in other words, the module that stores the customers details. We will select the **Customers** module, you can choose an equivalent module like the students, property buyers or policy holders.
2. **Module that contributes to the segmented module** - The module that stores the RFM metrics or details related to the purchases done such as, the last purchase date, number of purchases, total amount spent etc. You can select modules like **Products**, courses, or service requests that will have the above or equivalent fields in it.

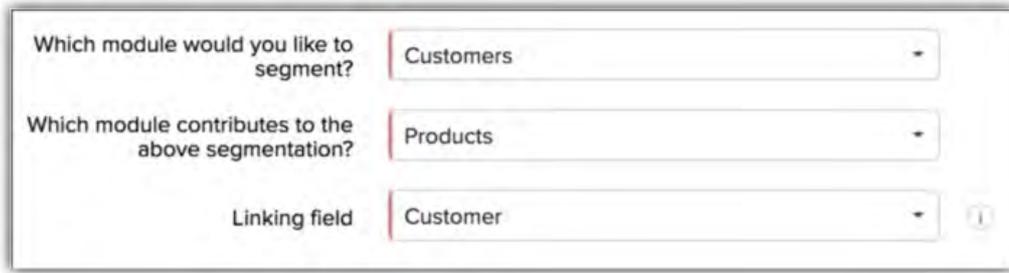
Create Segmentation

Segmentation name

Which module would you like to segment?

Which module contributes to the above segmentation?

3. **Linking field** - It is the lookup field that bridges information between the segmented (customers) and the contributing (products) modules. A field that creates a link between the modules and allows you to fetch information about the segmented module is called a linking field. For example, a lookup field from the contacts module within the deals module or customer module within the products module.



Five steps to set up segmentation

1. Choosing segmented module, contributing module and linking field.
2. Selecting RFM fields
3. Defining segmenting (global) rule entry
4. Setting score range and defining criteria for each score
5. Adding segment labels

Step 1 - Choose segmented module, contributing module, and linking field

Step 2 - Select RFM fields

The appropriate fields in the contributing module that represent the RFM fields should be selected.

1. **Recency field** - Any date or data-time field that will represent the last or the most recent purchased date qualifies as the recency field. For example, "sale closing date", "purchase completion date", "deal closed on" or "sold on".

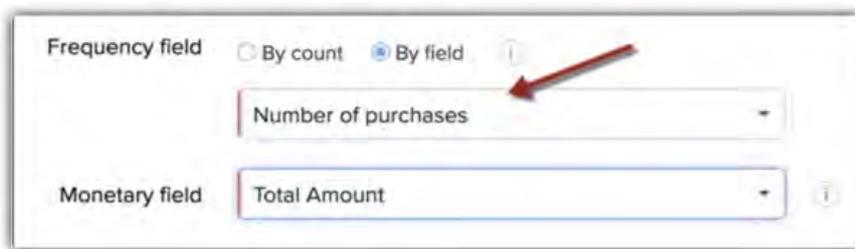
Note

- Zoho CRM will consider the most recent date as the value for the recency field.
- For date-time field, date will be considered as the recency field, time will not be taken into consideration.

2. **Frequency field** - You can either select by count or by field.

- If you choose "**by count**", system will automatically consider all the records that are associated with the segmenting record that is, number of deals associated with a contact, number of products bought by the customer.
- If you choose by field, you have to manually select any field that represents the number of times an activity is done, for example, fields like "number of products bought", "number of items sold", "number of deals associated" or "number of service requests received" indicate the frequency.

Note that, a frequency field must be present in the segmenting module and not the contributing module.



3. **Monetary field** - Any currency field that indicates amount. For example, "order value", "cost", "purchased amount", "deal amount" etc. If a customer has purchased multiple products or a contact has many closed deals associated with it, then system will automatically compute an aggregate amount and derive a value for the monetary field.

Step 3 - Define segmenting (global) rule entry

If you want only selected records to be segmented, then you can set a criteria based on which only the records that satisfy the criteria will be segmented. By defining the rule, you can segment a small set of customers from a particular region, product type, industry type, or preferred service and evaluate their purchase pattern. For example, you can perform a geographical segmentation by allowing the records that are from the US and Florida.



Step 4 - Set the score range and define criteria for each score

By default, the score range for each metric (recency, frequency, and monetary) is set to 1-5. You can decrease the range by dragging the score range slider to the desired position like 1-2, 1-3 or 1-4. You can either set the score manually or allow the system to do it automatically.

Manual - You have to manually define a criteria so the system will know when the R, F, and M scores should be 1, 2, 3, 4 or 5. For example,

- In **recency field**, you can give the score as 5 if the sale closing date is sometime "between this week and last week" or "it is not last month". Similarly, the score can be 4 if the recent purchase time is "till yesterday".

Score	Criteria
5	1 Sale Closing Date BETWEEN Aug 1, 2019, Aug 10, 2019 2 OR Sale Closing Date IS Last Month
4	1 Sale Closing Date IS Till Yesterday
3	1 Sale Closing Date IS BEFORE Jul 1, 2019
2	1 Sale Closing Date AGE IN DAYS = 60
1	1 Sale Closing Date IS EMPTY

- In **frequency field**, you define if the number of purchases is more than 8 the score must be 5 and if it is between 5 to 10 the score must be 4 and so on.

Score	Criteria
5	1 Number of purchases < 8
4	1 Number of purchases BETWEEN 5, 10
3	1 Number of purchases < 5
2	1 Number of purchases BETWEEN 1, 2
1	1 Number of purchases IS EMPTY

- In **monetary field**, you can give the score as 5 if the amount spent is above \$1500 and 4 when the amount is between \$800 to \$1200.

Recency	Frequency	Monetary												
		<table border="1"> <thead> <tr> <th>Score</th> <th>Criteria</th> </tr> </thead> <tbody> <tr> <td>5</td> <td>1 Amount > 1500</td> </tr> <tr> <td>4</td> <td>1 Amount BETWEEN 800, 1200</td> </tr> <tr> <td>3</td> <td>+ Add Criteria</td> </tr> <tr> <td>2</td> <td>+ Add Criteria</td> </tr> <tr> <td>1</td> <td>+ Add Criteria</td> </tr> </tbody> </table>	Score	Criteria	5	1 Amount > 1500	4	1 Amount BETWEEN 800, 1200	3	+ Add Criteria	2	+ Add Criteria	1	+ Add Criteria
Score	Criteria													
5	1 Amount > 1500													
4	1 Amount BETWEEN 800, 1200													
3	+ Add Criteria													
2	+ Add Criteria													
1	+ Add Criteria													

Automatic - The system will automatically compute the RFM score using the percentile method. The entire data set is divided into five parts (to give scores within a range of 1-5) with distribution at the 20th percentile. That is, each RFM score will range from 1st to 20th percentile - 0 to 20, 20 to 40, 40 to 60.



For the **recency** score, data set will be distinguished between the most recent purchase and the oldest purchase. For example, if the recent purchase was a week ago and the old purchase was 6 months ago, then CRM will set these two timelines as the boundaries and draw the percentile within this duration. The scoring will be done at every 20th percentile rank.

Similar, for **frequency** and **monetary** fields the highest to lowest occurrence and highest to lowest value will be computed respectively.

Note

- The recent date, the highest frequency, and highest value are subject to change, therefore the system will recalculate the data range and the number of records automatically everyday.
- You can change the scoring criteria from automatic to manual or vice-versa. However, doing so will reset the computed values to default and recalculation will occur based on

the new criteria that is set.



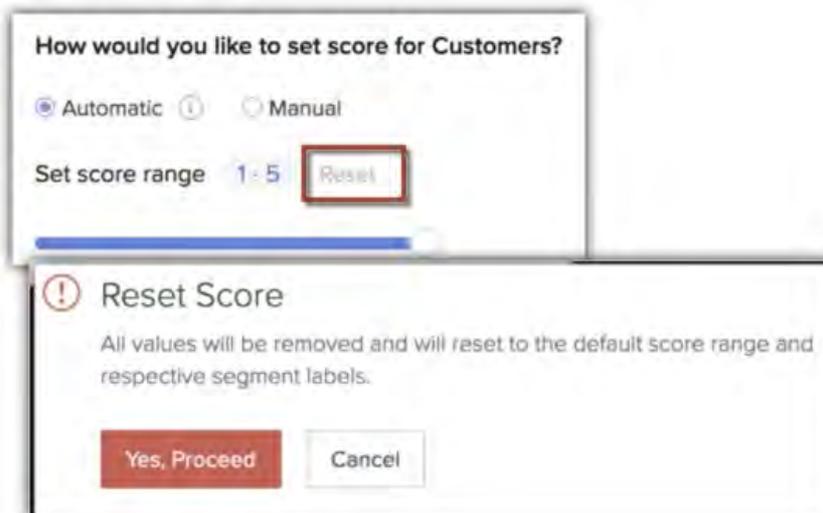
Adjusting the percentile bar

The default percentile ranking is set to 20th percentile for ease of understanding and proper record distribution, however, you can reposition the slider and change the percentile ranking.

Note - The system will take into account 20,000 records for automatic RFM scoring for the first configuration. After that, up to one million records can be computed.

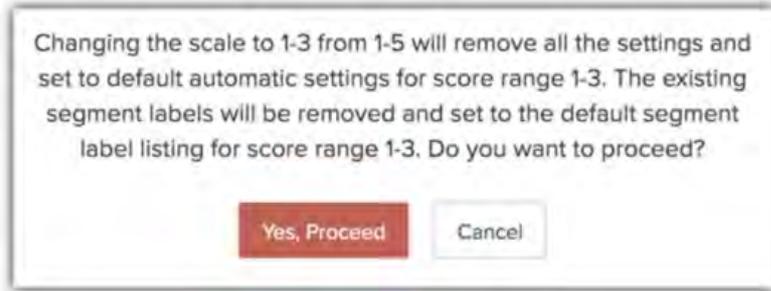
Reset the score range

You can reset the score range after defining the criteria, however this will render the scoring to be reset to the default values.



You can also reposition the score range slider, but, it will remove all the settings and set it to default settings that apply to the revised score range. Also, the existing labels will be removed

and adjusted to the labels in the revised score.

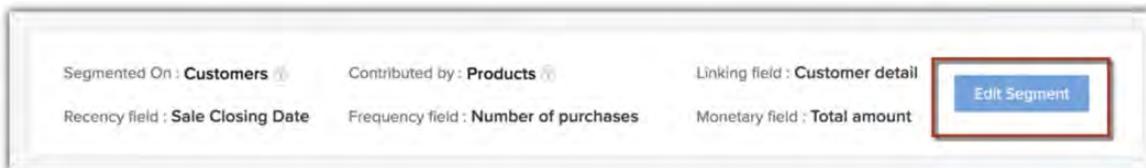


Edit the segment

You can edit the segment from the segmentation page and revise the values in the following fields:

- Linking
- Recency
- Frequency
- Monetary

Note that, both the segmented and contributed modules cannot be edited.



Step 5 - Creating labels for the segment

CRM provides 8 predefined labels that you can use for the segment. You can edit or delete these labels and add new ones. For each label you need to define the RFM range between 0 to 9.

To configure segmentation

1. Go to Setup > Automation > Segmentation.
2. In the *Customer Segmentation* page, click **Create New Segmentation** and specify the following:
 - a. **Segmentation Name** – Enter value. (Buying pattern, behavioural segmentation, preferred technology.)
 - b. **Which module would you like to segment?** - Choose a module from the drop-down list. (Leads, Customers, Contacts.)

- c. **Which module contributes to the above segmentation?** - Choose a module from the drop-down list. (Deals, Products, Devices or Applications.)
 - d. **Linking field** - Select a field from the drop-down list. (Customer)
 - e. RFM Fields Entry:
 - **Recency field** - Select a field from the drop-down list.
 - **Frequency field** - Select by count or by field. (choose a field from the drop-down list)
 - **Monetary value** - Select a field from the drop-down list.
 - f. **Global Rule Entry** - Choose either all records or based on criteria.
3. Click **Next**.

You will be redirected to choosing customer scoring.
4. In How would you like to set criteria for customer scoring? choose *Automatic* or *Manual*.
 - **In automatic**, move the slider to change the default percentile rank for each R,F, and M level and click **Compute**.
 - **In manual** for each level click **+Add Criteria** > Select the field > Mention the value > **Submit**.
5. Click **Next**.

You will be redirected to the labeling of the segments.
6. Click **Add New Label** and enter label name and the RFM values.
7. Click **Submit**.
8. Click **Publish**, to configure the segmentation.

Working with Calls

Making and receiving calls are an essential part of a rep's daily activities. They need to track the calls that are made to the customers, schedule calls according to the customer's availability, take down details of the calls, and make note of the calls that were missed. In spite of their busy schedule, it's important that they jot down every detail in an organized manner to have details at hand.

The Calls layout in the Activities module gives the right platform to store and track every detail related to a call. The sales reps can enter call details like duration, date and time of calls, notes, etc. about the inbound, outbound, scheduled, and missed calls.

The data can be used to evaluate the time spent on each call or the average time a call takes to complete and more details. The details can be helpful in generating reports on billing details, call status, number of calls made per day, and more.

Customizing the Calls layout

The default fields present in the calls layout allow the reps to capture basic call information. The calls layout (in the Activities module) is divided into four sections:

- Call Information
- Purpose of Outgoing Call
- Outcome of Outgoing Call
- Reason for Incoming Call

You can customize the layout by adding custom fields to the above sections, except for the *Call Information* section.

The screenshot displays a form with several sections, each containing fields with their respective data types and actions:

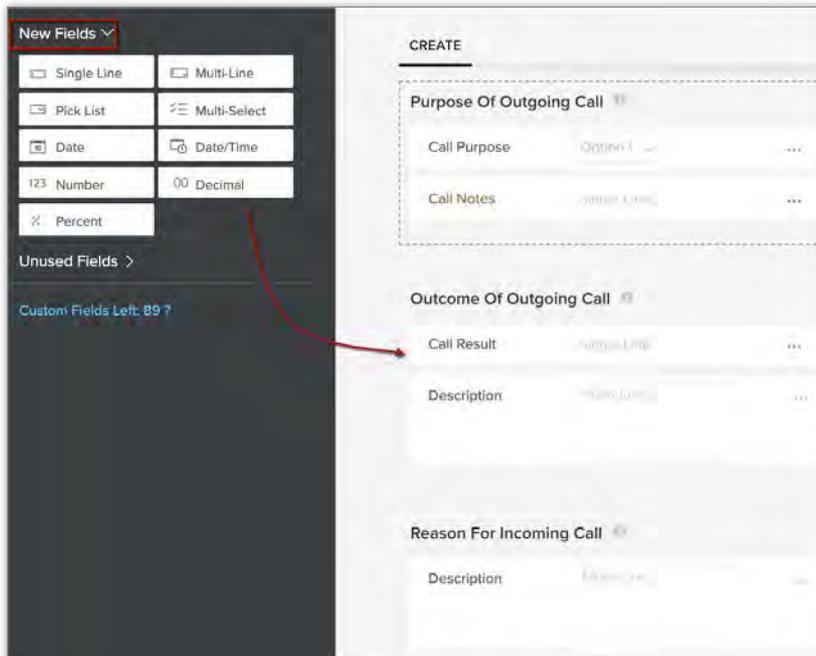
- Call Information**
 - Contact Name: Lookup
 - Call Start Time: Date/Time
 - Call Duration: Single Line
 - Call Type: Option 1 (dropdown)
 - Call Owner: Lookup
 - Related To: Lookup
 - Subject: Single Line
 - Created By: Single Line
 - Modified By: Single Line
- Purpose Of Outgoing Call**
 - Call Purpose: Option 1 (dropdown)
 - Call Notes: Single Line
- Outcome Of Outgoing Call**
 - Call Result: Single Line
 - Description: Multi-Line
- Reason For Incoming Call**
 - Description: Multi-Line

The total number of custom fields that you can add are:

- String Fields
(Single Line, Pick List, Multi-select Pick List, Multi Line) - 40
Max limit for Multi Line, Pick List, and Multi-select Pick List - 10 each
- Number fields - 10
- Decimal and Percentage - 20
- Date Fields – 10
- Date/Time fields – 10

To add custom fields

1. Go to Setup > Modules and Fields > Calls.
2. Click the **Standard** layout.
Alternately, hover over the *Standard* layout and click **More > Edit Layout** to add fields to the *Standard* layout.
3. From the *New Fields* tray on the left, drag and drop the required field types.



4. Name the field
5. Click **Save**.

Logging a call

You can log incoming calls, outgoing calls, scheduled calls, and missed calls. The type of call that is logged depends on the call start time. For example,

- If the **call start time** is in the **present**, then it is an outgoing call.

Create Call

Call Information

Call To: Lead → Hanna Cheryl

Call Start Time: 08/07/2019 Now

Related To: Account →

Subject: Outgoing call to Hanna Cheryl

Purpose Of Outgoing Call

Call Purpose: Demo

Call Notes: Ask the time, place and requirements

Buttons: Cancel, Call

- If the **call start time** is in the **past**, you can choose either **Inbound** or **Outbound** call type and specify the **duration**.

Create Call

Call Information

Call To: Lead → Hanna Cheryl

Call Start Time: 07/07/2019 02:08 PM

Call Duration: 34 minutes 12 seconds

Call Type: Outbound

Related To: Account →

Subject: Outgoing call to Hanna Cheryl

Purpose Of Outgoing Call

Call Purpose: Demo

Call Notes: Ask the time, place and requirements

Outcome Of Outgoing Call

Call Result: Demo Scheduled

Description: Time :12:00 PM Date: 09-07-2019

Buttons: Cancel

Create Call

Call Information

Call From: Lead → Hanna Cheryl

Call Start Time: 07/07/2019 02:08 PM

Call Duration: 34 minutes 12 seconds

Call Type: Inbound

Related To: Account →

Subject: Incoming call from Hanna Cheryl

Reason For Incoming Call

Description: Scheduling Demo and getting the pre-requisites.

Buttons: Cancel, Save

- If the call start time is on a later date, then you can schedule calls.

Create Call

Call Information

Call To: Lead - Hanna Cheryl

Call Start Time: 10/07/2019 02:08 PM

Call Owner: James Rob

Related To: Account

Subject: Call scheduled with Hanna Cheryl

Reminder: 5 minutes before

Purpose Of Outgoing Call

Call Purpose: Demo

Call Notes: Ask the time, place and requirements

Buttons: Cancel, Save

- Missed calls cannot be entered manually. They will be automatically captured from the telephony service that is integrated is with Zoho CRM. While making an outgoing call via the telephony service, the purpose of the call should be specified.

To log a call

1. In the **Activities** module, click **+ Call**.
You can also associate a call to a lead or contact by clicking **+ New Call** in the *Open Activities* related list in the record's details page.
2. In the *Create Call* page, do the following:
 - a. In **Call To**, specify the **Lead/Contact** name.
 - b. In **Call Start Time**, specify the date and time.
According to the selected time the other sections related to outgoing, incoming, and scheduled call will be displayed.
 - c. Enter the **Call Duration** in minutes and seconds.
Note, that this option will be available only for the outbound and inbound call

types.

Call Start Time	07/05/2019 12:04 PM
Call Duration	20 minutes 13 seconds
Call Type	Inbound
Related To	

Outbound

✓ Inbound

- d. Choose the **Call Type** from the drop-down list.
- e. In **Related To**, select a module from the drop-down list.
You can enter or search the record name.

Related To	Account	Zylker	
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- f. Enter the **Subject**.
- g. Based on the call start time, enter details in the subsequent sections:
 - For an Inbound call, specify the Reason for the Incoming call.

Call Type	Inbound
Related To	Account - Zylker
Subject	Incoming call from Zylker
Reason For Incoming Call	
Description	Scheduling Demo and getting the pre-requisites.

- For an Outbound call, specify the Purpose and Outcome of the outgoing call.

Call Type	Outbound
Related To	Account - Zylker
Subject	Outgoing call to Zylker
Purpose Of Outgoing Call	
Call Purpose	Demo
Call Notes	Ask the time, place, and requirements.
Outcome Of Outgoing Call	
Call Result	Demo scheduled
Description	
Time: 12:00 PM, Date: 09-07-2019.	

- For a scheduled call, specify the Purpose of the Outgoing call.

Call Start Time	19/07/2019	12:04 PM
Call Owner	Patrick Jane	
Related To	Account - Zylker	
Subject	Call scheduled with Zylker	
Reminder	None	
Purpose Of Outgoing Call		
Call Purpose	Demo	
Call Notes	Ask the time, place, and requirements.	

3. Click **Save**.

Configuring Workflow Rules for Calls

By configuring workflow rules for calls, you can automate recurring actions such as sending emails, updating fields or assign task, when specific conditions pertaining to a particular call are met. Rules can be made for incoming, outgoing, scheduled, missed, and deleted calls.

Often the reps run into a risk of irking their customers or getting issues escalated to the superiors if the calls are missed or rescheduled without prior notice. Issues like these can be handled easily by defining appropriate actions when specific conditions are met. Like, if a rep receives a missed call, immediately another user must be notified to contact the customer.

Configuring workflow rule consists of the following steps:

Basic Details - Enter the Rule Name and the Description.

Rule Trigger - Specify the rules based on the type of call.

- **Incoming call** - Set Triggers for an incoming call.
- **Outgoing call** - Set Triggers for outgoing calls.
- **Scheduled call** - Triggers for scheduled calls, when a call is:
 - Created/Edited
 - Overdue
 - Rescheduled
 - Reassigned
 - Cancelled
- **Deleted call** - Set triggered when a call log is deleted.
- **Any of the above** - Set rules irrespective of the type of call.

Workflow Conditions - The conditions can be set based on:

- Call Fields (Call Duration, Call Purpose, Call Result, etc.)
- Caller (Leads, Contacts, Accounts, or Unknown).

Instant Actions - Specify actions like sending email notifications, assigning tasks, updating fields creating webhooks, and functions which will be executed when the workflow rule is triggered.

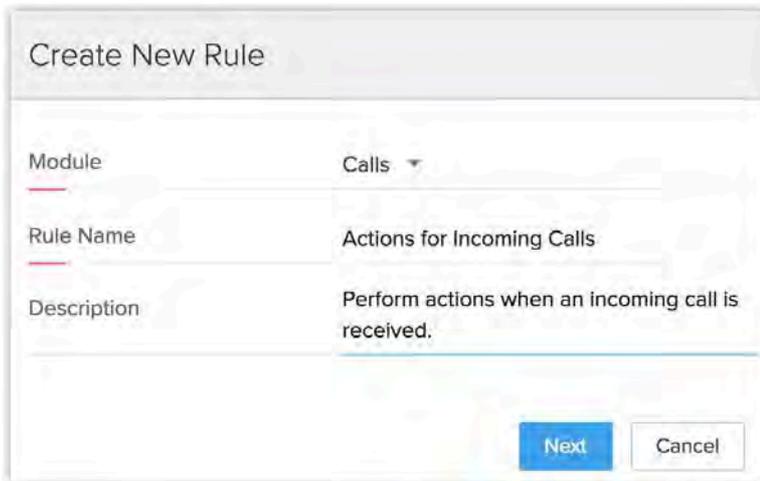
To configure workflow rules

1. Go to Setup > Automation > Workflow Rule.

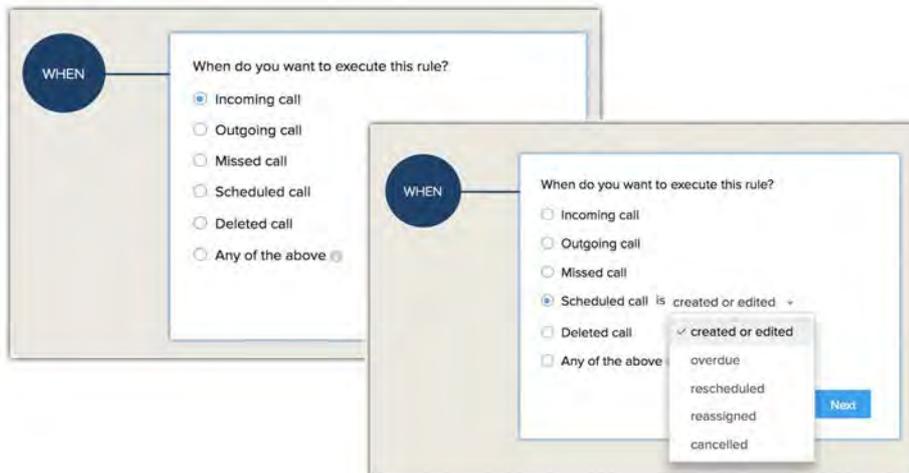
2. In the *Workflow Rules* page click **+ Create Rule**.



3. In *Create New Rule* page, select **Calls** from the drop-down list.
4. Specify the **Rule Name** and **Description**.

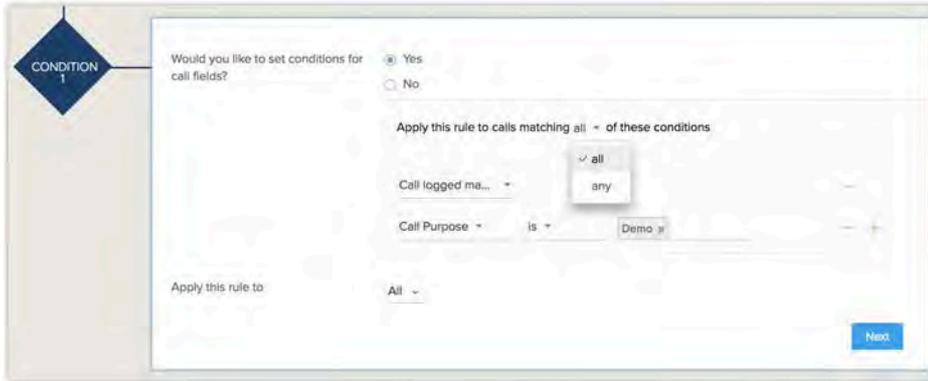


5. Click **Next**.
6. Select when you want to execute the rule.



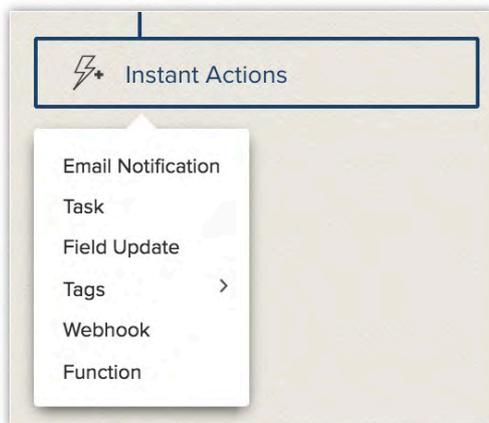
7. Click **Next**.
8. Check **Yes** if you want to set conditions for call properties.
9. Specify the conditions based on which workflow will be triggered.
You can apply the rule to all modules, or selected module, or records in a module which

matches the specified conditions.



10. Click **Next**.

11. Click **Instant Action** and select an action from the drop-down list.



12. Associate an action and click **Save**.

Review Process

It is always the best practice to analyse, and most importantly, verify the information that enters the organisation's database. In the long run it helps in maintaining a clean database and saves a lot of time and effort. Here is an example to explain. Let us say, a firm receives hundreds of loan applications everyday through manual and online submissions. The agents enter the application details in a CRM, from where each request goes through various processes and moved to different departments within the company. When applications reach a certain stage in the loan approval process, some of them are rejected for reasons like invalid documents, incorrect information, and less number of employed years among other examples. This could be avoided if they were reviewed and approved beforehand by a team of reviewers and then allowed to enter the subsequent sales processes.

Again, manually reviewing the data for accuracy, validity, and appropriateness by team of reviewers is not feasible. It will be difficult to maintain the pace and accuracy when there are hundreds of records to check, especially the ones that automatically enter the CRM system through web forms or portals. Zoho CRM's Review process can function as a checkpoint and prevent erroneous data from entering the system. The records under review process are not displayed in a module's list view and are considered locked, therefore preventing any automation processes on them such as workflows, approvals, or blueprints. Additionally, during the review period, CRM users can always send emails to the applicants or submitter to communicate to them about the approval of their submissions and in case of rejection, the reason for the same.

Note

You can create a review process for records that enter your CRM account through web form, API, portal, and integration with other applications.

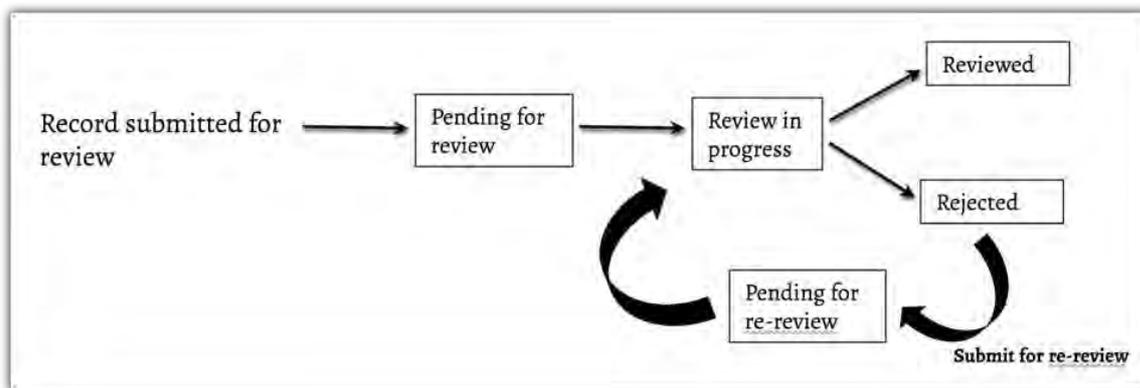
Feature Availability

Available in Enterprise and Ultimate editions.

- **Limits in Enterprise:** 5 review processes per module.
- **Limits in Ultimate:** 10 review processes per module.

Understanding the review process in Zoho CRM

You can configure review process for both standard and custom modules in Zoho CRM, and single module can have multiple processes associated with it. A few selected fields of a record can be ascribed to review and the reviewer need to either approve or reject the field values and in turn the record as a whole. Below is a flowchart representation of a record in the review process:



Configure review process - Similar to the workflow rules, you first need to configure a review process. The records that meet the criteria mentioned in the rules of a review process will be awaiting for approval in the **My Jobs** module.

Review records - The reviewer then analyzes and cross-checks the information in the fields that are marked for review. Against each field the reviewer can approve or reject. In case of rejections, the user can additionally select the reason for the same.

Steps involved in setting up a review process

Enter process details

You can set up multiple review processes for a single module by creating one each for the layouts in the module. In the first step, you will have to specify basic information such as, the process name, description, desired module, and layout. Let us take the example of a loan verification process to understand this feature.



New Review Process

Process Name: Loan application process

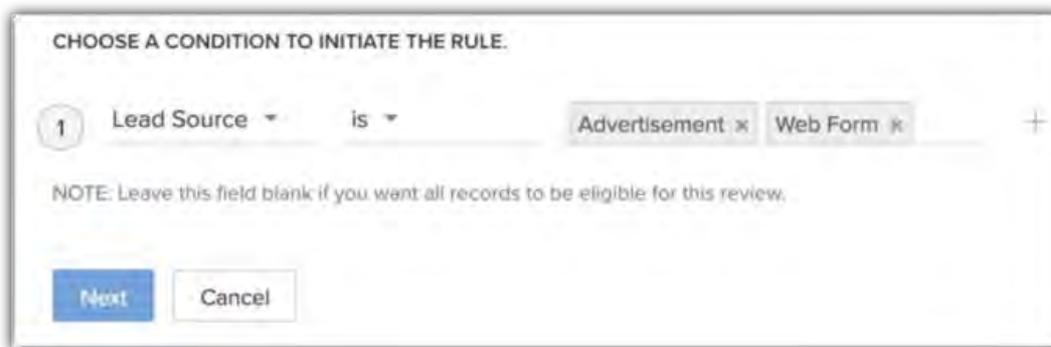
Description:

Choose Module: Leads

Choose Layout: Standard

Define condition to initiate the rule

In this step you have to specify the records that need to be reviewed. You can either allow all the records to be reviewed or define a criteria so that only selected records are sent for review. In our example, review process will be initiated only for the applicants that are entering the CRM system through web forms and advertisements.



CHOOSE A CONDITION TO INITIATE THE RULE.

1 Lead Source is Advertisement Web Form

NOTE: Leave this field blank if you want all records to be eligible for this review.

Next Cancel

Choose the set of field for review

In the third step, you can select the fields that you want the reviewer to cross-check. In this example, we can select the annual income, number of dependents, other insurance details (if any), and past loans details to be reviewed before sanctioning a loan.



Which fields should be reviewed?

Field Set

Phone number Annual Income Dependants Other insurance details

Continue

Create rule/conditions

In this step, you can add multiple rules. Each rule will include two elements: additional criteria to filter records further and the users to whom the records that meet this sub criteria will be assigned for review. For instance, in our example, two rules are added.

- **Rule/Condition 1** - If country is Canada and the province is Quebec, assign Mike as a reviewer.

The screenshot shows the configuration for Rule 1. The main window has a title 'Mention sub-criteria for users to review.' and two radio buttons: 'Based on Criteria' (selected) and 'All Records'. Below this, there are two criteria: '1 Country is Canada' and '2 Province is Quebec', separated by 'AND'. The 'Criteria Pattern' is shown as '({1} and 2)'. There are 'Edit Pattern' and 'Continue' buttons. A preview window below shows the sub-criteria as 'City IS Canada AND Province IS Quebec' and the reviewer as 'Users: Mike'.

- **Rule 2** - If the application is for personal medical insurance, assign David as a reviewer.

The screenshot shows the configuration for Rule 2. The main window has a title 'Mention sub-criteria for users to review.' and two radio buttons: 'Based on Criteria' (selected) and 'All Records'. Below this, there is one criterion: '1 Loan type is Personal medic...'. There is a 'Continue' button. A preview window below shows the sub-criteria as 'Loan type IS Personal insurance' and the reviewer as 'Users: David'.

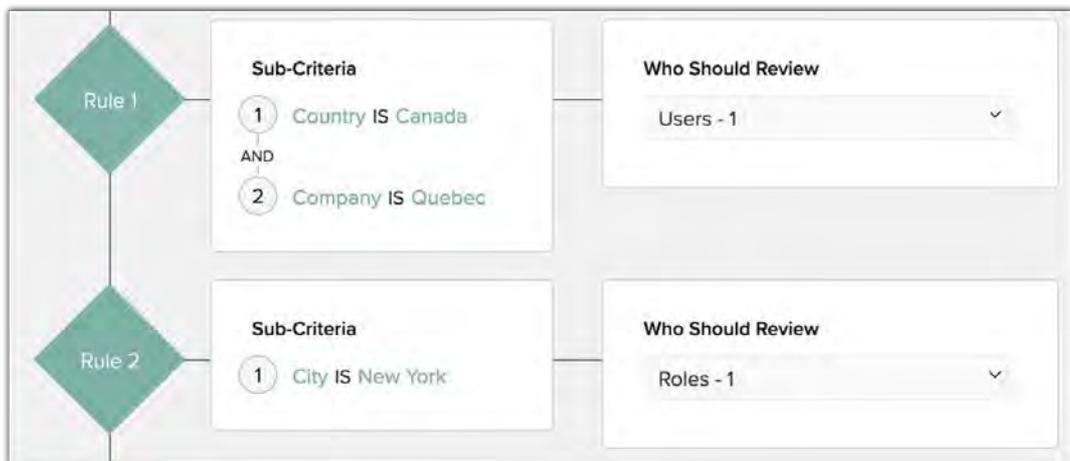
- **Others** - All the other records that do not meet the criteria in the above two rules will be assigned to Rachel.

The screenshot shows the configuration for the 'Others' rule. The preview window shows the sub-criteria as 'Leads that do not meet above criteria' and the reviewer as 'Users: Rachel'.

Similarly, you can create up to five rules in a review process.

Note

- You can select the reviewers from either of the categories: users, roles, groups or record owners. You can select up to 5 reviewers.



- The *Others* option makes sure that, all the records that do not meet the criteria will be assigned to a user so that every record is reviewed.

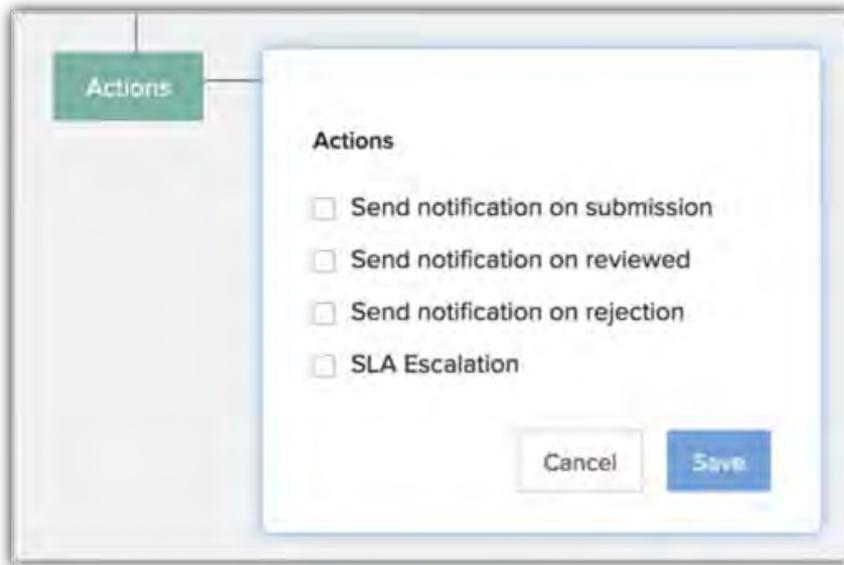


Add actions for the process

You can select the actions that must be performed once the records are submitted, reviewed or rejected. The actions include:

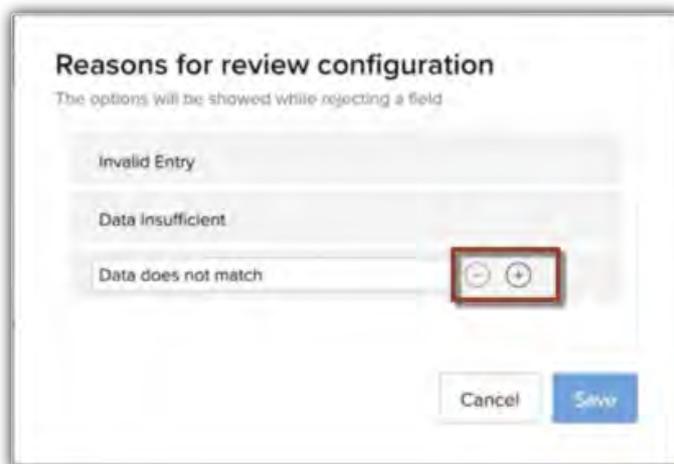
- Send notification on submission (The reviewer and the record submitter will receive an email notification).
- Send notification on review completion
- Send notification on rejection
- SLA (service level agreement) escalation - SLA is the waiting period of a record in the review stage after submission or resubmission. The selected CRM user will receive a notification about the escalation.

Note that the notification upon submission, review completion, and rejection are sent to the record submitter, reviewer, and the CRM administrators.



Configure reasons for rejection

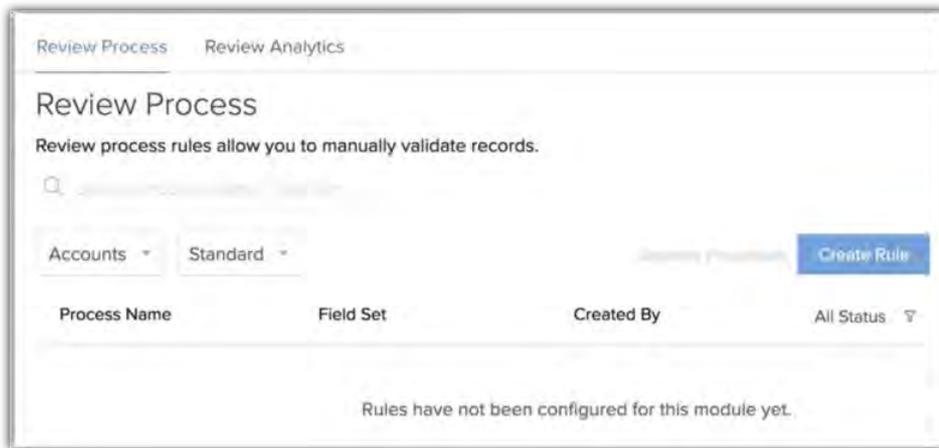
The following reasons for rejection are available by default: Invalid Entry, Data Insufficient, and Data does not match. When a field is rejected by reviewers, they can choose the reasons for rejecting the record. You can add more reasons and have up to 10 such reasons for rejecting a field.



Configuring Review Process

To configure review process

1. Go to Setup > Process Management > Review Processes.
2. In the review process page, click **Create Rule**.



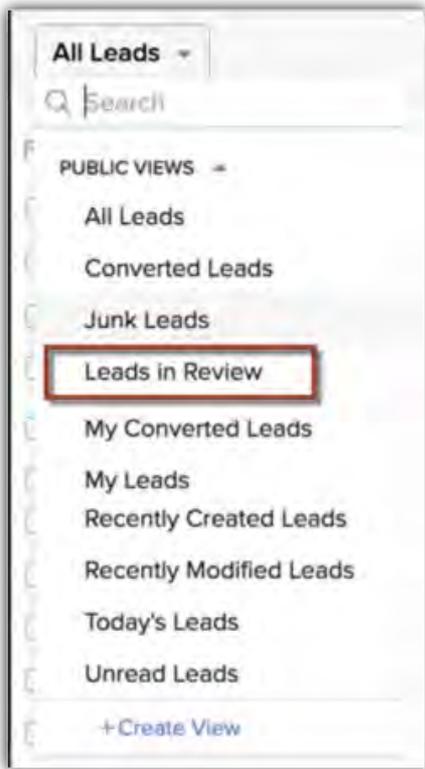
3. In the New Review Process page, enter the following details:
 - **Process Name** - Enter the process name.
 - **Description** - Enter a description for the process.
 - **Choose Module** - Select the module from the drop-down list.
 - **Choose Layout** - Select a layout from the drop-down list.
4. In Choose a condition to initiate the rule, specify the criteria and click **Next**.
5. Click the **Add** icon to enter more criteria.
6. In the **Field** set, choose the fields that need to be reviewed.
7. Click Continue.
8. In Rule 1, mention the sub-criteria for the users to review, do the following:
 - a. Click **Based on criteria** to specify the criteria for the records
 - b. Click **All records**, if you do not want to specify a criteria.
 - c. Click Continue.
 - d. In *Who should review*, click **Choose Reviewers**.
 - e. Select users, groups, roles or record owners from the drop-down list.
 - f. Select the user and click **Add**.
 - g. Click **Save**.
9. Click **Instant actions** and select the required checkbox(es) and click **Save**.
10. Click the **Configure Reasons For Record Rejection** link to add or edit reasons for rejection.
 - a. In *Reasons for review configuration* popup, edit the reasons and click **Save**.
 - b. To add more reasons, click the + icon. To remove listed reasons click the - icon.
11. Click **Save**, to save the entire review process.

Points to remember

- The type of fields that can be sent for review are:
 - Single line and multi line
 - Email
 - Phone
 - Date and Date/time
 - Number
 - Currency
 - Decimal
 - Percentage
 - Long integer
 - URL
- The same type of fields in a subform can also be submitted for review
- When one of the fields is rejected, the option to reject the entire record will be available.
- You can create a review process for different layouts. If you delete a layout which has records that need to be reviewed, then you will be prompted to choose an alternative layout to continue with reviewing of records. If the new layout does not have any review process, then the record will be added to the respective modules for further process.
- If you have enabled the web form approval option, then the records will enter the review process after the web form approval is completed.
- Before entering a review process, a record will always go through other data validations and approvals in CRM: validation rule, web form approval, layout rule.
- Information sync from one Zoho application to CRM and vice-versa (such as Zoho Desk to CRM, Zoho Creator to CRM) will take place only after the record completes the review process.

Approving or Rejecting records and field values

Records that are pending for review are displayed under the **My Jobs** tab, from where the reviewers can access it. Alternately, the records can be found under a custom view in the Leads module called " Leads in review", this view will be visible only to the reviewers.



List view of records in review process

The following details about the record will be displayed in the list view:

- Record name
- Number of fields in that record that are under review
- Review status like rejected, review in progress, pending for review
- Name of the user who created the review process
- The date on which the record was submitted for review
- The process that the record belongs to
- The module to which the record belongs
- The layout to which the record belongs

RECORD NAME	NO. OF FIELDS TO REVIEW	ALL STATUS	CREATED BY	DATE OF SUBMISSION	PROCESS	ALL MODULES	LAYOUT
00002334566	5	Pending for re-review	James	2019-07-20	A	Cases	Standard
544323489	1	Unreviewed	Michelle	2019-07-19	B	Purchase Orders	Standard
223385866896	5	Rejected	Jake	2019-07-19	C	Products	Standard
000564321867	2	Rejected	Alex	2019-07-19	D	Price Books	Standard
Product A	5	Unreviewed	John	2019-07-19	E	Products	Standard
Product B	5	Pending for re-review	Hugh	2019-07-19	F	Products	Standard

Approving or rejecting fields

The reviewer can select the record that needs to be reviewed from the **My Jobs** view or the custom view in the leads module "Leads in review" to approve or reject the fields. The number of fields that need to be reviewed in the selected record are displayed in the records detail page.

The reviewer can navigate the fields using the navigation arrow.



To approve or reject fields

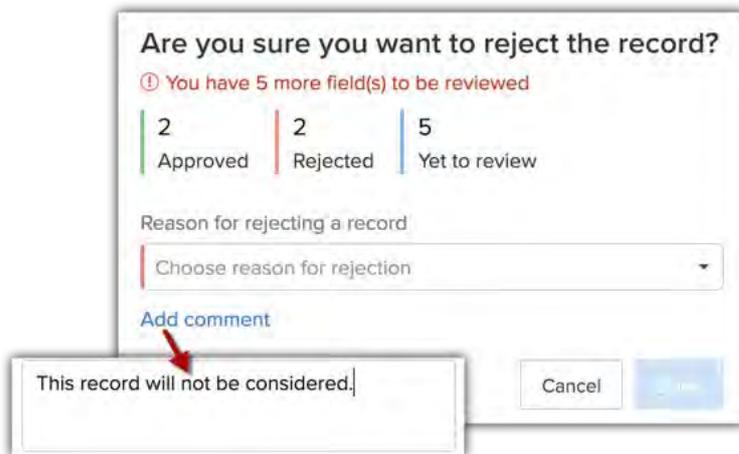
1. Go to the *My Jobs* module and select **Review Process** from the drop-down list.
2. Select a record with **Pending for Review** status.

In the record's details page, the fields that need to be reviewed will show a tick icon.

3. Click on the icon, and in the popup, select **Approve** or **Reject**.



Note that a record is considered as rejected if one field is rejected by the reviewer. The reviewer can reject a record even without reviewing some fields.



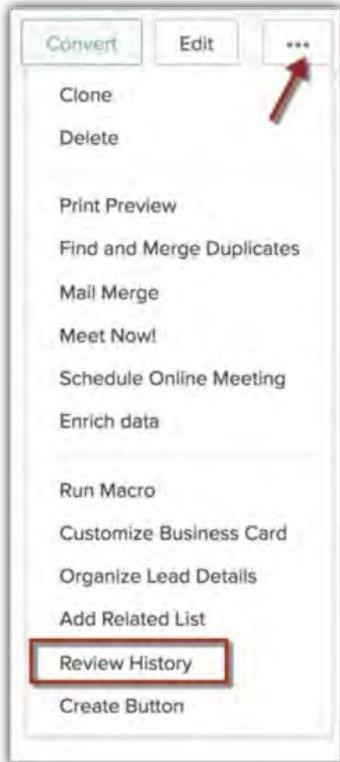
Viewing Review History

Once a record is reviewed and approved it will be added to the module's list view as a record. From there you can view the review history of a record that will list out information like: date on which the record entered the process, fields that were reviewed or re-reviewed, fields that were approved and the date on which the record was reviewed. Other details about the record's journey in the review process will be stored in the Timeline.

To view review history

1. Select a module and choose a record.

2. Click the *More* icon and select **Review History**.



Viewing review process usage

In review analytics we have provided four predefined reports that will give you an insight on the different review processes and help you evaluate their performance.

Report type	Description
Average waiting time in review process	Identify delays or stagnancy in review process by observing the average waiting period of a record in the review process.
Review status by record count	Total number of records at different review statuses: <ul style="list-style-type: none"> • Pending for review • Review in progress • Rejected • Pending for re-review
Field status by record count	List of fields that underwent the review process and the number of fields that were

	approved or rejected in the process.
Rejected reason by record count	Records are categorized based on the reason for rejection.

To view review analytics

1. Go to Setup > Process Management > Review Processes > Review Analytics.
2. In the *Review Process Usage* page, select the desired report.
3. Filter the report by module, layout and review process name.

Reordering the Processes

The review processes that you created will be displayed in **My Jobs** tab under review process. These processes are listed in the order of creation, that is, the most recent process will be listed first. Whenever, a record matches review criteria of more than one process it will enter the review process in the order that they are listed. However, if you want the records to follow a particular order while entering, you can reorder the processes.

To reorder the processes

1. Go to Setup > Process Management > Review Processes.
2. In the *Review process* page, click **Reorder Processes**.
3. Drag and drop the processes.
4. Click **Save**.

Note: You can search the processes by process name or the fields in the field set.

Deactivating or Deleting a Process

You can delete or deactivate a process that you want to discontinue. Before deleting or deactivating any review process, you must consider the following points:

For deleting a process:

- You can move your mouse pointer on a process that you want to delete and click the **Delete** icon.

- You will not be able to delete a process, if records are lined-up for review or undergoing review.

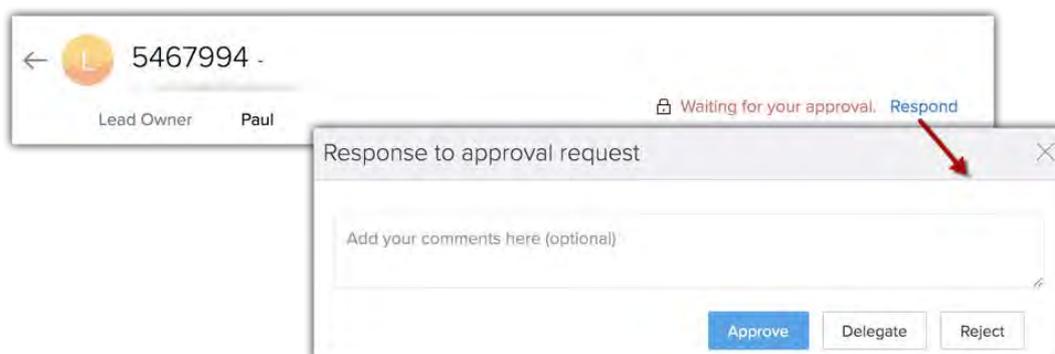


- If the rejected records from a process that is deleted is resubmitted for review, it will enter the existing process based on the satisfied criteria and sub criteria. Also, the process will be selected based on the order in which they appear in the list of review processes.

For deactivating a process:

- You can toggle off a process to deactivate. If the process has pending records, you will be prompted to take either of the following actions:
 - Reject the record(s).
 - Move the records to the system.
 - Exit the records out of the process and run through other active processes.
- In the last two actions, there are chances of a record being added as "Unreviewed" in the system. You can view such records from the My Jobs tab and approve, delegate or reject them.

RECORD NAME	NO. OF FIELDS TO REVIEW	ALL STATUS ▾	CREATED BY	DATE OF SUBMISSION	PROCESS
5467892	5	Unreviewed	Dave	2019-07-19	Application check
5467994	6	Unreviewed	Paul	2019-07-19	Application check



- If a process is deactivated, then the resubmitted and new records will enter one of the active processes based on the criteria and sub-criteria mentioned in the other processes.

CommandCenter

CommandCenter allows you to build online replicas of your business processes using multiple modules. It is ideal for organizations that have several departments, services, or third-party applications participating in the culmination of a single business process. For example, loan sanction process, supply chain management, inventory management, ecommerce, etc. are lengthy, complex, and intricate processes where each level involves multiple transactions. To make sure the process flows without interruption, it is important to monitor every stage closely and gather forecasts on: overall performance, stagnancy or loopholes in stages, and delays during transition. CommandCenter allows you to design these elaborate processes and link independent teams and modules together to give collective and accurate insights about its performance.

Difference between CommandCenter and Blueprint

In [Blueprint](#) you can create a process for a single module, whereas in CommandCenter you can create a process using multiple modules.

For example, you designed a perfectly functional and productive blueprint for the supply chain process in your organization. A few years later, your company begins to also manage other arenas like vendor management, financial transactions, and courier tracking services. To ensure the SCM process is running smoothly through all of these services and not stalled at any particular transit, you decide to include all the processes within the existing blueprint. However, you realize that though these processes are within CRM, they are not part of a single module and thus can't be added to a single process builder. This is where **CommandCenter** can help you.

In CommandCenter, you can build complex and widespread journeys that put together multiple modules and third-party applications under one process builder to give a bird's-eye view on the process's performance.

Feature availability

Users with Administrator profile permission can create, edit, and delete CommandCenter models. The number of models you can create depends on your CRM edition.

- Enterprise: 5 journeys/org (includes both active and inactive journeys)

- Ultimate: 10 journeys /org (includes both active and inactive journeys)

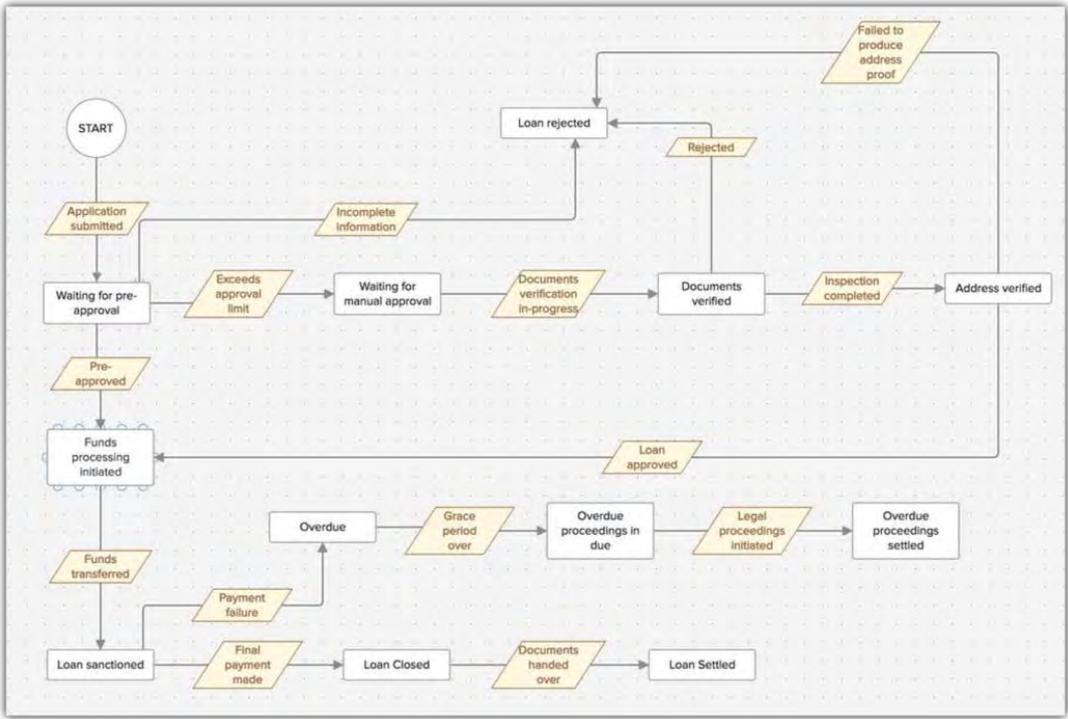
Business Scenarios

Let's look at a few business scenarios where CommandCenter can be used effectively:

Loan sanction processes

Zylker Finances provides monetary assistance to small and medium-sized businesses. Applicants looking for a loan enter the necessary details in the loan application form and submit it for further processing. During this process, their form sails through different stages and departments like pre-approval, document verification, fund release, legal verification, and pre-closing before the prescribed amount is approved. Here, each stage plays a crucial role in propelling the application to the subsequent stages and finally completing the process. Therefore, an online replica of this process should be able to capture details like stages where an application is stalled, if a stage is skipped, the amount of time spent at one stage, and more.

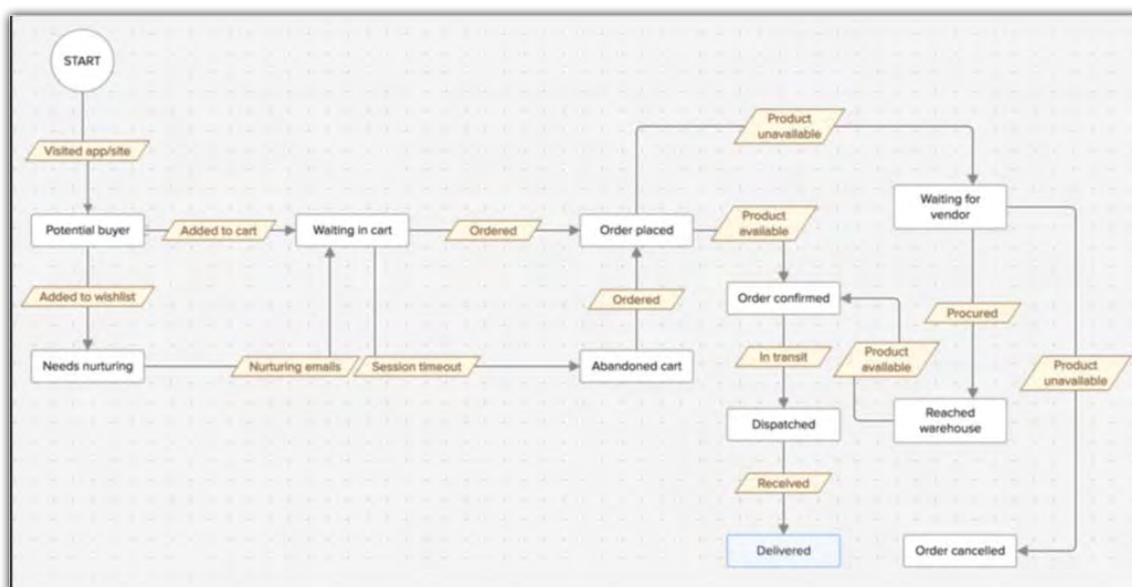
The process builder in **CommandCenter** gives a perfect platform for this by allowing you to add stages and transitions from multiple CRM modules. One can even define the deadline for a process's completion, add automated actions between stages, involve actions during transitions that can be captured in different modules, and more. Here is an example of how the process will appear in CommandCenter.



Supply chain management

Zylker Logistics operates a supply chain management business. It transacts with several departments—production units, vendors, shipment logistics, and third-party services—to complete its production-and-delivery cycle. Their SCM cycle follows this route:

- The business begins with consumers showing interest in one of their products.
- The product's availability is browsed in the inventory and the stock details are displayed to the consumer.
- If the requested/searched product is unavailable, the purchase request is sent to the supplier/vendor.
- Once the product is in stock, the inventory is updated, and a notification is sent to the consumer (followed by other lead nurturing activities, if required).
- The consumer books the product, pays through the payment gateway, and receives shipment details via email, SMS, and an app notification.
- Shipment is tracked, and the consumer is notified of any delay or early delivery.
- Product is delivered, and the SCM cycle is closed for that consumer.



From the time the buyer shows interest in a product until it's successfully delivered, the SCM creates a network including individuals, organizations, departments, activities, and resources that culminate in the selling-and-buying cycle. All these touch points add value to the SCM

operation, and it's important to monitor, manage, and track the efficiency and gather accurate insights on the performances.

Replicating this journey using **CommandCenter** will give detailed information about stages that propel a product's movement to the subsequent level, stages at which the product gets stalled, time spent at a particular state, and more.

These metrics in turn can help in revising the existing process, having tighter control over the associated costs, forecast customer's purchase behavior, throw light on lead nurturing efforts, and more things that impact the company's bottom line.

Building a journey in CommandCenter

Similar to a [Blueprint](#), you need to define states and transitions in CommandCenter.

States are nothing but the different stages of a process, for example in the above mentioned loan sanction process: waiting for pre-approval, waiting for manual approval, document verification are the different states. Learn more about states [here](#).

Transition is the link between different states in a process. It prescribes the conditions required for a record to move from one state to another. For example, the condition required for a loan application to move from **Document verification** to **Loan rejected** are mentioned in the transition **Rejected**. Learn more about states [here](#).

Now you have some idea about the building blocks of CommandCenter, which are same as that of a blueprint. **See also** [building blocks in a blueprint](#). Let us begin creating a process in CommandCenter.

In CommandCenter, the number of journeys that you can create depends on the CRM edition that you have subscribed. Each journey or model can have **five** different versions, but only one version can be active at a given time.

Creating an CommandCenter model involves the following steps:

Step 1. Adding basic information

Enter the journey name and give it a description.

Adding States and their actions

Step 2. Adding a state

In the journey builder, add a state that defines the first step of your journey. As CommandCenter lets you link all the CRM modules, you should select the module to which a state belongs. This must be repeated for every state that you add to the builder. You can add up to 50 states in a process.

Step 3. Defining actions for each state

You can define instant, scheduled, or recurring actions for each state. The action will be dependent on the state the record is in and will apply to all the records that reach the state.

Instant actions: Let's say you want to send an email notification to the vendor when an order is placed, or send a payment link to the customer via SMS once the order is confirmed. You can configure it in the following manner:

- **Record's state** - Order placed/Order confirmed
- **Actions configured** - Email notification to vendor/ Payment link to customer

You can set the following instant actions once a record reaches a particular state:

- Field update
- Email notification: 3 actions/state
- Task: 3 actions/state
- Webhook
- Functions
- Add/remove tags: 10 tags/state
- Slack and Cliq notification: 5 notifications/state

Scheduled actions: You can set a particular action to occur after a record is in a state for certain days, hours, or minutes. For example, you can assign a task to call the customer a day after the first installment is paid or a day after the vendor ships the product. You can configure it in the following manner:

- **Record's state** - First installment/Product shipped
- **Actions configured** - Call the customer

You can set the following scheduled actions:

- Field update
- Email notification
- Task
- Webhook
- Function

Recurring actions: If you want an activity to occur repeatedly at regular intervals, you can set a recurring action. For example, you can send reminder emails every day for a pending payment, send notification to the vendor after the client confirms booking, or send email alerts to support agents until a ticket is closed. You can configure it in the following manner:

- **Record's state** - Payment pending/Booking confirmed/Ticket open
- **Actions configured** - Email notifications/webhook notification/Email alerts

You can set the following recurring actions:

- Field update
- Email notification
- Task
- Webhook
- Function

Step 4. Defining the deadline for a state

If you want records to be in a particular state only for a specific period, you can specify a deadline for the state. You can also choose what should happen to the records after a state has reached its deadline—the record can either be escalated or moved to another state.

- Escalate it to any user from the following categories:
 - Users
 - Groups
 - Roles
 - Records: owner, creator, or record owner's manager

An email notifications will be sent to the selected user.

- Move the record to any of the last state in the journey. For example, as per the SCM process, the record can be moved to the final state of the process: "order cancelled."

Note that the option to select a deadline for a state will appear only if you have added a transition between the states. Also, defining a deadline is not a mandatory step.

Transitions, actions, and triggers

Step 5. Define a transition and when it should be triggered

A transition creates a link between two states. It lets you define the condition at which a record can move from one state to another. For example, a record can move from "order placed" to "order confirmed" only if the "product availability" transition is satisfied. Therefore, in the inventory if the product availability status is available only then the transition will be completed. **You can add up to 80 transitions in a process.**

You can select multiple triggers for a transition. Triggers are of following kinds:

- **Submission of a webform** – A transition will be triggered when a record has entered CRM through a webform. This trigger is available only at the beginning of the journey or for the first transition of a journey.
- **Creation of a record** – A transition will take place whenever a record is created in the specified module and layout.
- **Edit of a record** – A transition will be triggered whenever a record is edited. You can also add a condition. For example, whenever the lead status is changed to qualified, a payment link must be sent.
- **Receiving an API call** – If you want to invoke any transition from the third-party application, you can select this option and copy the API URL provided by us. Also, you can mention the parameters that should be passed along with each API call. You can select a maximum of six parameters from the following data types: string, number, date, date/time, boolean.
- **Approval of record** – A transition will be triggered only if a record is approved. For example, an order will be placed only upon payment approval. You must select to which approval process the record belongs.
- **Rejection of record** – A transition will be triggered on rejection of a record. For example, the order will be canceled if the payment fails. You must select to which approval process the record belongs.

- **A date/date time** – A transition will be triggered at date or date/time field of a module.

Transition Info

Transition name
Payment

Description

Trigger on
Receiving an API call
Creation of a record
Edit of a Contact
Receiving an API call
Approval
Rejection
A date / date time

Note:

- Once you define a trigger, it cannot be edited. You must delete it and add a new one.
- You cannot delete a module that is part of a state and the trigger point of a transition once it is defined in a journey.

Step 6. Define an action that should take place during a transition

You can set an instant action that should happen during the transition. For example, once the quote is approved, a notification must be sent to the vendor with the product details, quantity, and recipient's address. You can select the following actions:

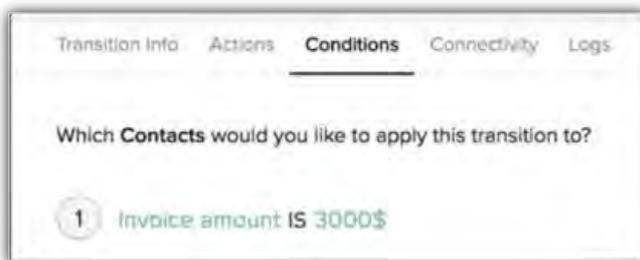
- Create record
- Field update
- Email notification
- Task
- Webhook
- Functions
- Add/remove tags

Note: An instant action during a transition is particularly helpful when the state and transition are in two different modules. For example, in the above case, the state occurs in the "Quotes"

module, whereas the transition takes place in the "Vendor" module. In other words, you can define different sets of actions for different modules in a single process. Two different actions can be performed simultaneously at different states.

Step 7. Specify criteria for the selected records to undergo a transition

If you want only specific records to undergo a transition, you can define which criteria the records should satisfy in order to move into a transition. For instance, you can mention that only invoices above \$3,000 should undergo a transition for "discount" before moving to the next state.



Step 8. Define connectivity between records

This option can be used in cases where you want to track the specific records on which a transition occurred. For example, say you received a request for a product demo from three different customers through email. You send them webinar invitations, and a week after attending it, one of the three customers purchases the product. So this customer moves from the "lead" state to the "contacts" state. Since moving these states means moving between two modules, by using the connectivity options—look-up or reference—you can trace the path and find the action that propelled the record to the next state.

In our example, after attending the webinar, the lead makes the payment and moves to the next state (contact). You must add the contact's look-up or give reference of the contact within the lead's record to:

- Understand how the two records are interlinked
- What activity led the record to the next state

Note:

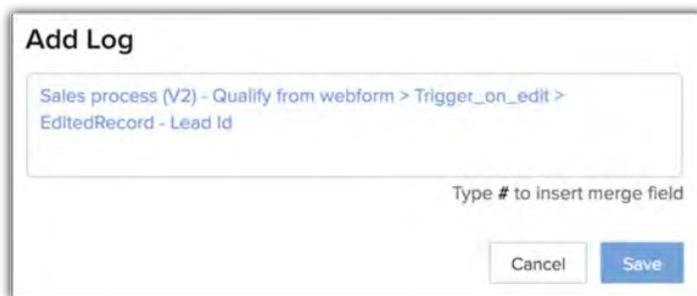
- The connectivity tab will be available only if the states are defined in two different modules. Like in the above example where the record moves from the leads module to the contacts module.

- Reference can be given only if a record is created from the CommandCenter journey. Manual creation will not be considered. For example, a contact (record) is created after a lead is qualified.

Step 9. Add a log to the transition

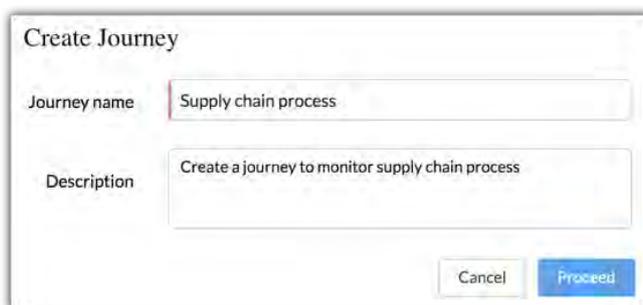
If you want to note any important details or information, you can type it in the log section. This can be viewed in the timeline under CommandCenter. You can add up to three logs in a transition.

You can insert merge fields in the log to view the complete journey of the record until the particular transition. For example, the below image shows which process the transition belongs to, the name of the transition, when was it triggered, the action that took place upon trigger, and the result.



To build a journey

1. Go to Setup > Process Management > CommandCenter.
2. Click Create Journey and enter the Journey Name and Description.

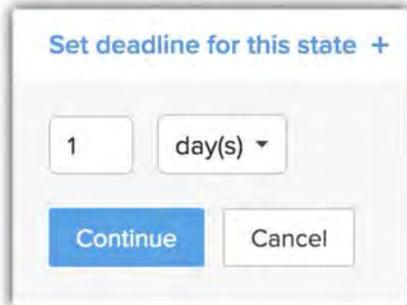


3. Click **Proceed**.
4. In the *Journey Builder*, click on **Click to add a state**.
5. In *Create State*, enter the **State Name**, **Description**, and under **Type** choose a *Module* from the drop-down list.

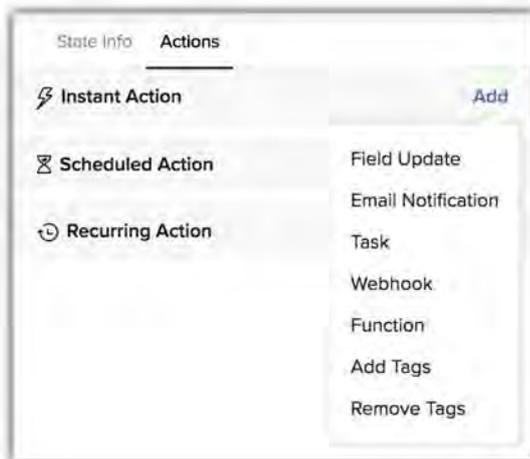
6. Click **Save**.

You will be redirected to the process builder. You can either add **Actions** to the state or click **+Add State** to add more states.

7. Click **Set deadline for this state** and enter the number of day(s), hour(s), or minute(s).



8. In the *Actions* tab, select **Instant**, **Scheduled**, or **Recurring** action.



9. In *Instant Action*, click **Add** and select an action from the available list.

10. In *Scheduled action*, enter the number of day(s), hour(s), or minute(s) and click **Continue**.

11. In *Recurring action*, mention the number of day(s), hour(s), or minute(s) and click **Continue**.

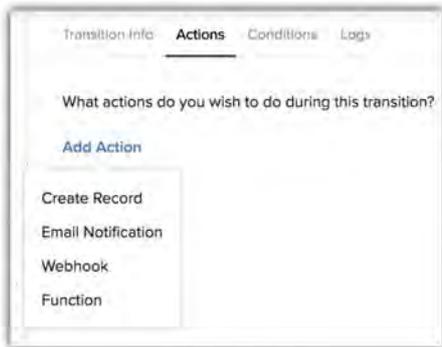
For both scheduled and recurring actions, you can also add instant actions (field update, email notification, task, webhook, and function).

12. Create *Transitions* by clicking on the **+** button between the *States*.

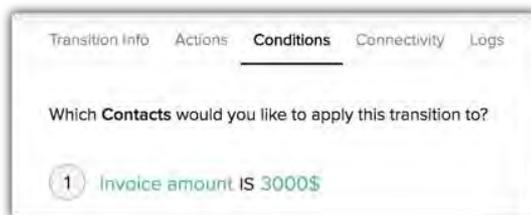
13. In the *Transition info* tab, enter the **Transition name**, **Description**, and choose **Trigger** on from the dropdown list.

14. Click **Save**.

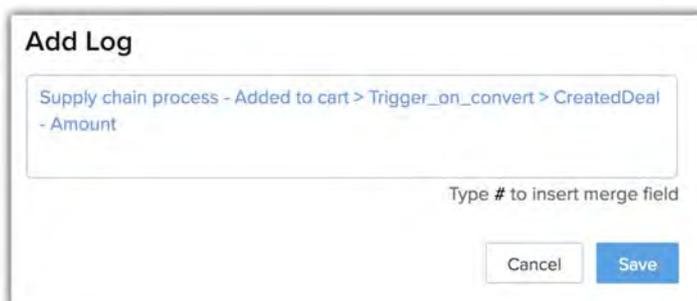
- In the *Action* tab, click **Add action** and select an **Action** from the available list, under *What actions do you wish to do during this transition?*



- In the *Conditions* tab, click **Add Criteria** to define Which [records] would you like to apply this transition to?



- In the *Logs* tab, click **Add Log > Enter the details** and click **Save**.



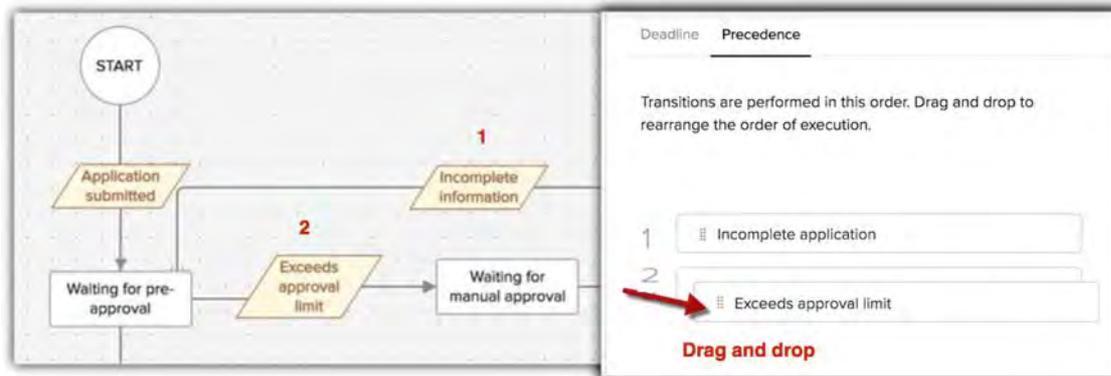
- Click **+Add State** to add more states.

- Click **Publish** to make the CommandCenter live or **Delete draft** if you want to discard it.

Defining precedence of transition

In situations where the first state in the model has multiple transitions, the transitions will occur in the same order as they are listed in the configuration. But if you want, you can change the order of execution by setting the order of precedence.

Let's consider the loan sanction process. If the state "waiting for pre-approval" has two transitions—"incomplete application" and "exceeds approval limit"—the application (record) will follow the transitions in the listed order. If you want to reorder them, you can drag and drop the transitions to the desired order of execution.



Specifying deadline for the journey

You can specify a deadline for the entire process. For example, if your model concentrates only on lead generation, you can set a deadline for the process after the lead generation state is reached. You can add a deadline either while configuring the process or later. You can select the journey and go to the **Deadline tab** and click **Set deadline for the journey**.

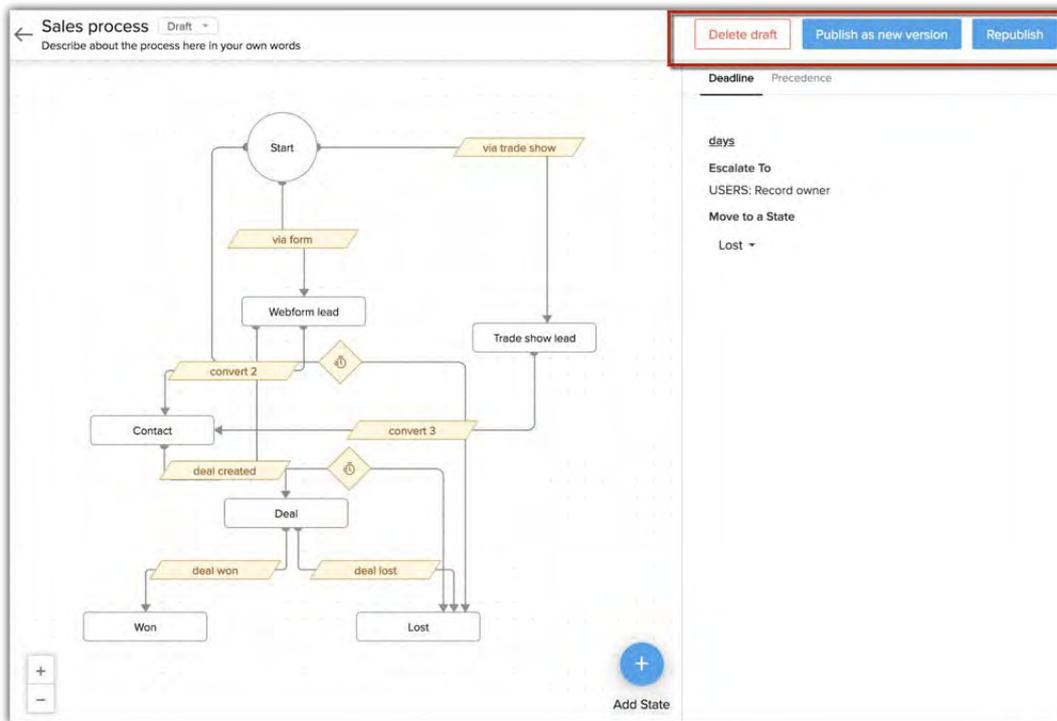
Here you must mention the number of days, hours, or minutes **after** which a journey should end. You can choose a deadline a few days after the start of the journey or after a state is reached (for example: lead qualified). You can define if the records should be escalated or moved to a state.

Setting a deadline allows you to see the number of records that reach the completion state and take remedial actions on the ones that are stalled at a particular state.

Editing the versions of a journey

You can create up to five versions of one journey, but only one version can be active at a given time. When you edit any active journey, there are three options:

- **Delete draft** - You neither save nor publish it. Just delete it.
- **Publish as a new version** - The edited version can be published as a new version. This will retain the existing version and allow you to compare the performance of the versions.
- **Republish** - You can overwrite the existing version.



Viewing records in CommandCenter module

Once a journey is created in an CommandCenter, a system defined module called "CommandCenter" is added to your CRM account. You can view the records that participated in a particular journey and filter them according to their instance ID, CommandCenter start date, CommandCenter deadline, state deadline, and more. When you have multiple models, you can use the custom view to filter and see the desired model. You can also use the smart filter to see specific records.

Viewing CommandCenter reports

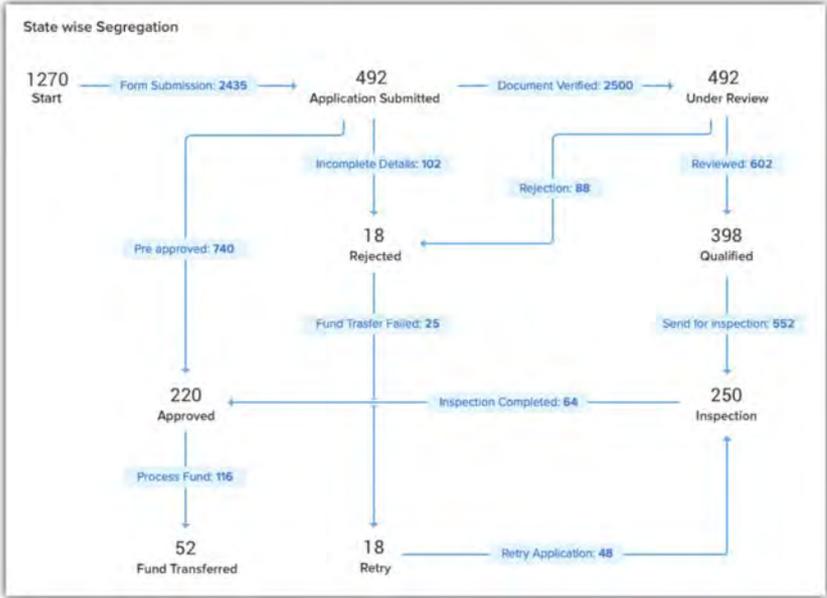
CRM provides three system defined reports to get insights on the journeys built in the CommandCenter. Aside from the standard reports you can create custom reports using combination of parameters and related modules.

(To see system defined reports, go to **Setup > Process management > CommandCenter**, hover on a journey and click **View Reports**).

Standard reports

- **State-wise segregation** – Number of records in each state.

- **Average time taken in each state** – Amount of time a record spends in one state. You can figure delays, pinpoint the bottleneck states, identify the states that have maximum stagnation, and note the time taken for a transition.
- **Overall report** – The overall report will give a pictorial representation of the entire journey with the record count in each state and transition.



Custom reports

You can create tabular, summary or matrix reports. The journeys will be listed as modules along with versions. Modules used for creating a journey will be available under the related modules.

For example, a journey built to manage online enrollment for courses through different campaigns can get insights on the number of enrollments that were lost or junk, the campaign that they belonged, and the amount spent on the campaign. It can help them decide whether to spend on a particular campaign for upcoming enrollments.

Lost grouped by course and source Edit Cancel

+ Column Lead Created Time - Custom - Start Date End Date Apply Filter

COURSE	SOURCE	FULL NAME	EMAIL	STATE	CREATED TIME	CAMPAIGN COST
Machine learning	Tradeshaw(2)			Lost	12/19/2016 03:42 PM	\$ 15.00
				Junk	12/19/2016 03:42 PM	\$ 15.00
						\$ 30.00
	Facebook Campaign (May)			Lost	12/19/2016 03:42 PM	\$ 0.50
				Lost	12/19/2016 03:42 PM	\$ 0.50
				Junk	12/19/2016 03:42 PM	\$ 0.50
					\$ 1.50	
Data Analytics	Tradeshaw(5)			Junk	12/19/2016 03:42 PM	\$ 15.00
				Lost	12/19/2016 03:42 PM	\$ 15.00
				Lost	12/19/2016 03:42 PM	\$ 15.00
				Junk	12/19/2016 03:42 PM	\$ 15.00
				Junk	12/19/2016 03:42 PM	\$ 15.00
	Facebook Campaign (June)			Lost	12/19/2016 03:42 PM	\$ 15.00
						\$ 90.00
				Junk	12/19/2016 03:42 PM	\$ 0.50
				Lost	12/19/2016 03:42 PM	\$ 0.50
						\$ 1.00
					\$ 122.50	

To create a custom report

1. Click the **Reports** tab from the top panel.
2. Click Create Report.
3. In the *New Report* page select any **CommandCenter module** from the drop-down list.
4. Select a **Related Module**.
You can select only one related module.
5. Click **Continue**.

New Report

1. Module Information

Select Module

Online enrollment - V1 (CommandCenter) ▾

Select Related Modules

- Contacts
- Campaigns
- Leads(last name > Trigger_on_create > CreatedRecord)
- Subscriber(last name > Connectivity > Lookup course)

ⓘ You cannot select more than one related modules.

Continue Cancel

6. Select a **Report type** and click **Continue**.

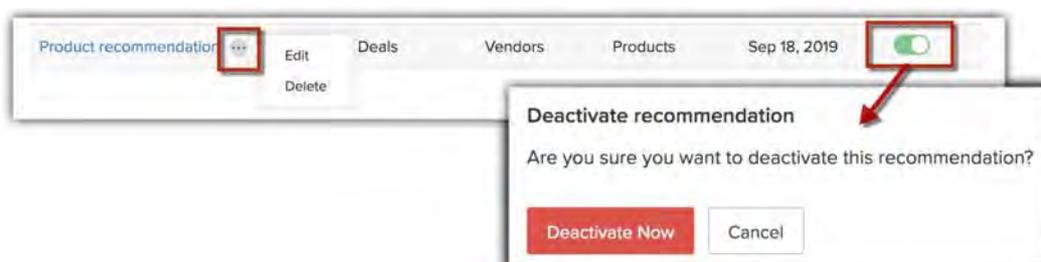
7. In *Report representation*, select and add columns that you want to see in the report. In **Columns to total** tab, for each number field (eg. revenue, campaign cost, number of leads) select if you want to see the values in Sum, Average, Lowest or Largest value.
8. Click Continue.
9. Enter criteria for standard and advanced filters.
10. Click **Run** to generate the report or **Continue** to enter the basic information.
11. Click **Save**.

Reorder, deactivate, and delete journeys

Reorder processes – All the journeys you've created will be listed in the order of creation, but you can reorder them by clicking the **Reorder Journeys** option under *Process management > CommandCenter*. However, you must remember the records enter the journeys based on the listed order, therefore, if you reorder the journeys, the records will enter the journeys according to the new order.

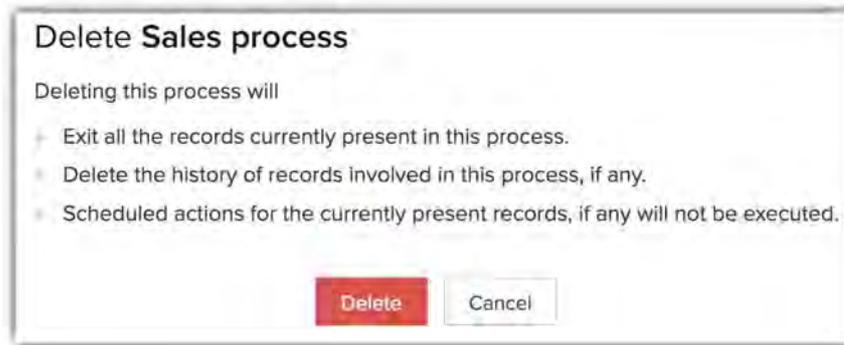
C3 NAME	LAST MODIFIED	STATUS
Product purchase	Feb 11, 2020	Draft
Claim management/insurance	Mar 25, 2020	Draft
Telephone service	Apr 2, 2020	Draft

Deactivate journeys – You can toggle the **status button** to deactivate a journey. Once deactivated, new records will not enter that journey until it's activated. However, the data within a journey will be kept intact.



Delete journey – You can hover on a journey and click the **delete icon** to delete a journey. However, before deleting the journey, you must note that:

- All the records that are currently in the journey will be exited.
- The history of the records will be permanently deleted.
- Actions that are scheduled for the current records will be stalled.



Important Points

- If a record is part of an CommandCenter journey, there will be an orange strip added to it in the record's detail page for ease of identification. The strip will display the state where the record is coming from to the next state in line.
- We are currently not supporting copy customization and sandbox.
- You can edit an existing journey and republish it, which will overwrite the existing version. You can also save the process as a new version.

Multiple Sales Pipeline

What is a sales pipeline?

A sales pipeline is a visual representation of your sales process that shows where your prospects are in the buying cycle, how many open deals you have, how long a particular deal stayed in each stage, and whether you have a good chance of winning a deal.

While the sales processes followed in different businesses won't be the same, they all tend to use similar stages. The main aims of any sales process are identifying and acquiring leads, getting in touch with them to understand their requirements, analyzing and presenting an offer, and finally closing the deal. Though, in reality, every deal progresses differently. For example, sometimes you will find prospects who are so interested in buying that they skip several of the stages and jump right to closing the deal while others may slowly progress towards the buying stage. Regardless of these differences, it is still helpful to create a general sales pipeline that helps you keep track of every deal.

Sales pipeline for deals

In any sales process, a deal has to pass through several stages until it is closed or lost. To make sure that deals are not left stagnating in the same stage unnecessarily, the sales team needs to keep a close watch on their deals pipeline. Our Deals module contains different stages including qualification, value proposition, negotiation, and closed won that appear in a typical sales deal pipeline. These stages are available in a picklist field called Stage. You can add as many stages as you like to the existing pipeline to reflect your sales process accurately. Here are some of the ways a sales rep can benefit from a sales pipeline:

- Visualize and track the progress of a deal through each stage
- Take necessary actions based on the stage in the buying cycle
- Monitor how long a particular deal has stayed in a stage and take action to prevent stagnancy

The need for multiple sales pipelines for deals

Zylker Cars is a car dealership company that has different sales processes for reselling used cars, selling new cars, and providing car servicing. Some of the basic sales stages will be similar

across these three processes, but there will also be significant differences. The flow chart below shows the different deal stages for each process:

New Cars	Used Cars	Service Requests
Gathering requirements	Show available models	Request analysis
Test drives and car selection	Test drives and car selection	Repair process (ongoing)
Price quote	Price quote	Quality check and test drive
Negotiation	Negotiation	Bill generation
Closed won/lost	Closed won/lost	Service request/closed

As every process is different, putting all the deals through a single pipeline will not give a clear understanding of their progress. Therefore, Zylker Cars needs to create multiple sales pipelines to more accurately show how a deal is progressing.

Feature availability

Users with the *Module Customization* profile permission can create, edit, and delete pipelines. The number of pipelines you can create depends on your CRM edition. The following limits include the standard pipeline created with the Stage field in the Deals module.

- Standard: 5 pipelines
- Professional: 10 pipelines
- Enterprise: 20 pipelines (irrespective of the layout)
- Ultimate: 50 pipelines (irrespective of the layout)
- Developer Edition: 3 pipelines
- For all trial Editions: 3 pipelines

Creating multiple sales pipelines

The Stage field available by default in the Deals module, with system-defined stages such as: qualification, need analysis, value proposition, etc.

Standard pipeline

When you create a pipeline for the first time, we will create a system-defined standard pipeline and associate all the records in the Deals module with it. This is done to make sure that every deal is associated to at least one pipeline.

The standard pipeline will be created with the stages that are present in the Stage picklist field.

You can rename and customize this pipeline to meet your requirements. The standard pipeline will not be created if you do not have any records in the layout or if there is no Blueprint created for the Stage field.

Layout specificity

Pipelines are layout specific and you can create multiple pipelines for each layout. For example, you have a layout for sales and are selling two categories of products, furniture and furnishings, which have different sales processes. You can create two pipelines in the Sales layout, one for each category.

Moving a deal from one pipeline to another

The Deals module has a Stage field which is used for the default pipeline. If you create multiple pipelines in a layout, you can move a record from one pipeline to another manually (within the layout). You can also use the Mass Update feature to move a batch of records at once.

Probability value of a stage

Each stage in a pipeline will be assigned a probability value. If you are using the same stage in different pipelines, the same value will be used

When you create a new pipeline, you can create new stages and assign probability values to them, but you cannot modify the probability for the existing stages from the pipeline creation screen. You need to go to *Stage Probability Mapping* to change the probability for other stages.

If you set the forecast category to Pipeline, Closed, or Omitted in *Stage-Probability Mapping* then the deal stage will be Open, Closed Won, or Closed Lost respectively.

Stage-Probability Mapping - Standard Layout

STAGE NAME	PROBABILITY (%)	FORECAST TYPE	FORECAST CATEGORY
Qualification	10	Open	Pipeline
Needs Analysis	20	Open	Pipeline
Value Proposition	40	Open	Pipeline
Identify Decision Makers	60	Open	Pipeline
Proposal/Price Quote	75	Open	Pipeline
Negotiation/Review	90	Open	Pipeline
Closed Won	100	Closed Won	Closed

+ From Unused Values

Cancel Save

To create a sales pipeline

1. Go to Setup > Customization > Pipelines.
2. Click New Pipeline.
3. Enter a name and select the **Layout** to associate the pipeline with.
4. Add the **Stages** to the pipeline.

The default values from the **Stage** field from the standard layout will be available to choose from.

Create Pipeline

Pipeline Name

Layout

Stages

Requirement gathering ×

Test Drive and Car Selection × Proposal/Price Quote ×

Negotiation/Review × Closed Won × Closed Lost ×

Set as Default

Cancel Save

5. In the *Stages* option, click the **Create New Stages** link to add new stages.

- Enter the **Stage Name**, **Probability**, **Forecast Type**, and **Forecast Category** in the *Create New Stage* pop-up.

Create New Stage - Standard

STAGE NAME	PROBABILITY (%)	FORECAST TYPE	FORECAST CATEGORY
Qualification	10	Open	Pipeline
Needs Analysis	20	Open	Pipeline
Value Proposition	40	Open	Pipeline
Identify Decision Makers	60	Open	Pipeline
Proposal/Price Quote	75	Open	Pipeline
Negotiation/Review	90	Open	Pipeline
Closed Won	100	Closed Won	Closed
Closed Lost	0	Closed Lost	Omitted

- Click **Done**.
The new stage will be added to the new master list of stage values.
- Select the **Set as Default** checkbox if you want this pipeline to be the default when creating a deal.
- Click **Save**.

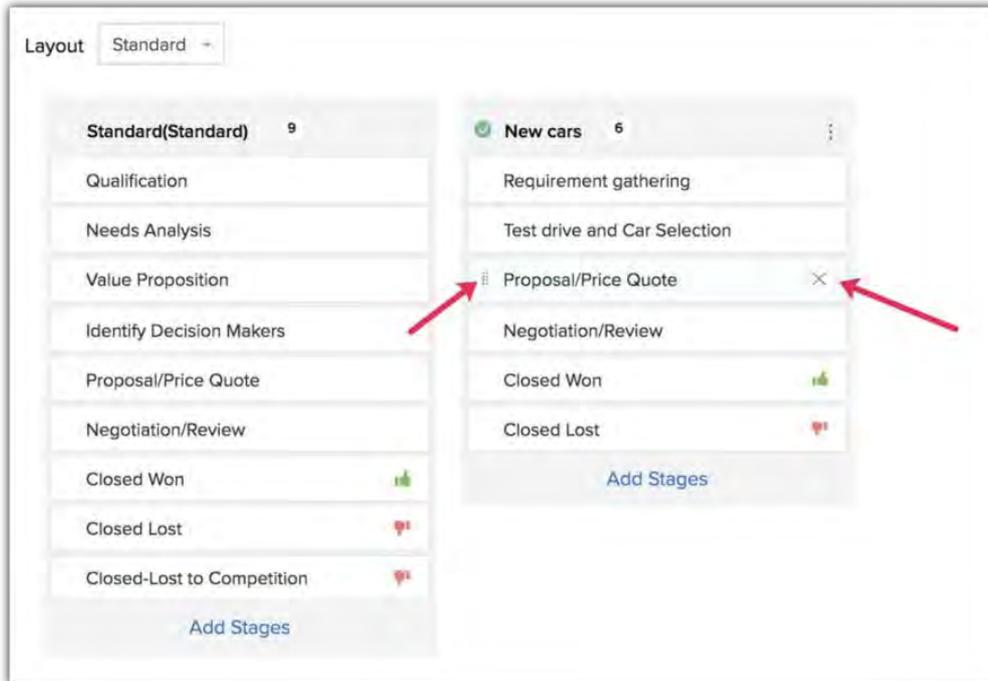
Modifying the stages in the pipeline

If your sales process is modified at any point, you can add or remove stages from the pipeline. The stages that you remove from a pipeline will not be deleted from CRM, they will still be available in the stage builder.

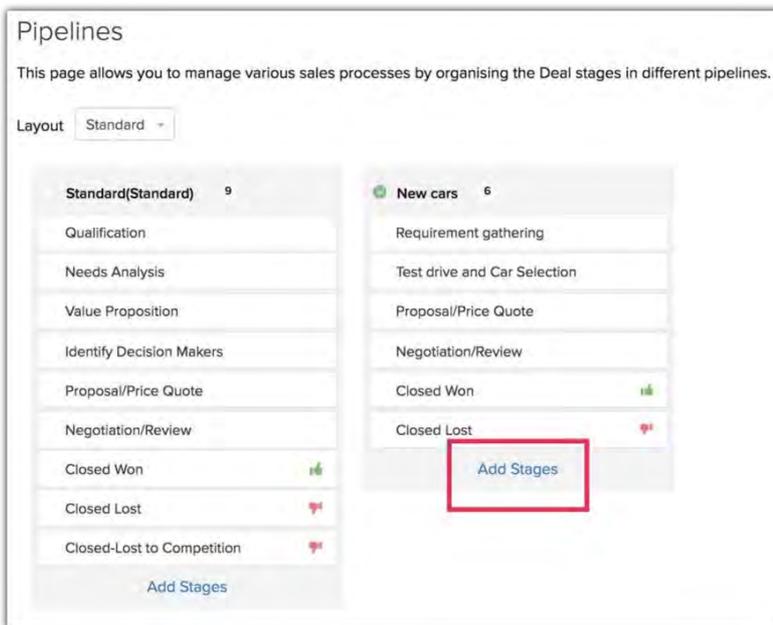
To modify the stages

- Go to Setup > Customization > Pipelines.
- Select the *Layout* from the dropdown list.
- Drag and drop the values to reorder the stages.

4. Click the **Close** icon for a stage to remove it from the pipeline.

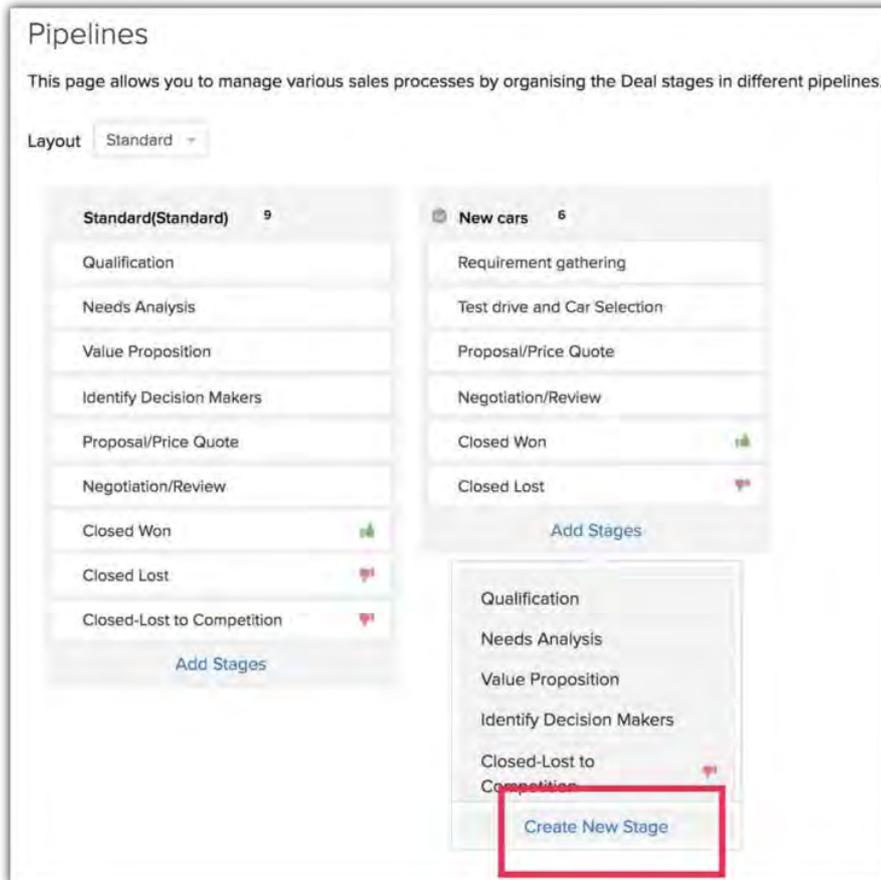


5. Click the **Add Stages** link in the pipeline that you want to edit.



6. Click on the stages to add them to the pipeline.
All the available stages created for the selected layout will be listed here. You can add and associate new stages by clicking the **Create New Stage** link.

7. Click **Save**.



How do pipeline and deal stages influence other CRM activities?

Mass updating records

When you mass update records, keep in mind that a pipeline is layout specific and the stages in it are specific to a particular pipeline. During the mass update, records will always be checked for a match in the following order: Layout > Pipeline > Stage. (You can mass update the layout, pipeline field, and stage field on records).

Mass update the Layout field

If you want to update the layout of multiple deals, you must also define the pipeline to move them to and the stage they will have.

Note that you will only need to select a pipeline if the layout has one; otherwise you can just select the desired layout and update the record.

Mass Update

Layout: Standard

Pipeline: Old Cars

Stage: Proposal/Price Quote

Cancel Update

Mass update the Pipeline field

Since a pipeline is closely linked to a layout, when you mass update the pipeline for records, CRM will check whether the records belong to the layout you want to move them to. For example, imagine that you have two layouts: Sales and Services, each of which has two pipelines. If you select some deals from the list view and move them to a pipeline that belongs to the Sales layout, then only the deals that already belong to the Sales layout will be moved. The remaining deals will be skipped because they are from a different layout.

Mass Update

Pipeline: Old Cars

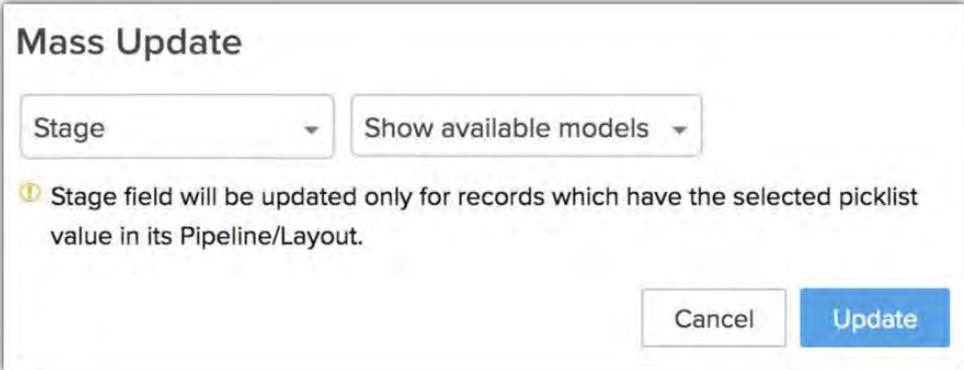
Stage: Test Drive and Car Selection

ⓘ Pipeline and Stage fields will be updated only for records which are in the selected pipeline's layout.

Cancel Update

Mass update only the Stage field

If you only want to update the Stage field, the records with the selected stage in their pipeline will be updated. The other records will be skipped. For example, if you choose the stage field to be updated to Negotiation, then only the records that have Negotiation in their pipeline will be updated, others will be skipped.



The image shows a 'Mass Update' dialog box. At the top, it has the title 'Mass Update'. Below the title are two dropdown menus: the first is labeled 'Stage' and the second is labeled 'Show available models'. Below these menus is a yellow warning icon followed by the text: 'Stage field will be updated only for records which have the selected picklist value in its Pipeline/Layout.' At the bottom right of the dialog box are two buttons: a white 'Cancel' button and a blue 'Update' button.

Note

- Pipeline and Stage fields can also be updated through macros, workflow rules, Blueprints, and follow-up actions (field updates) after sending mass emails.
- If the Stage field is used as a criteria in a layout rule or validation rule, then the Stage field and its dependent fields (Pipeline and Layout) will not appear in the mass update options.
- If the Pipeline field is used as a criteria in a layout rule or validation rule, then the Pipeline field and its dependent field (Layout) will not appear in the mass update options.

Creating a blueprint based on the sales pipeline

The Stage field is often used in Blueprints. Generally, Blueprints are layout specific, but if you have created pipelines in the layout, they are pipeline specific. If you create a blueprint based on the Stage field, you will be required to select the pipeline it is associated to. All the values in the Stage field will be used in designing the blueprint.

Create new Blueprint

Blueprint name Deal Qualification process

Module Deals ▾

Choose Layout Standard ▾

Choose field Stage ▾

Choose Pipeline New cars ▾

Define criteria for which records are associated with this Blueprint.
Leave this field blank if you want all records to be eligible for this Blueprint.

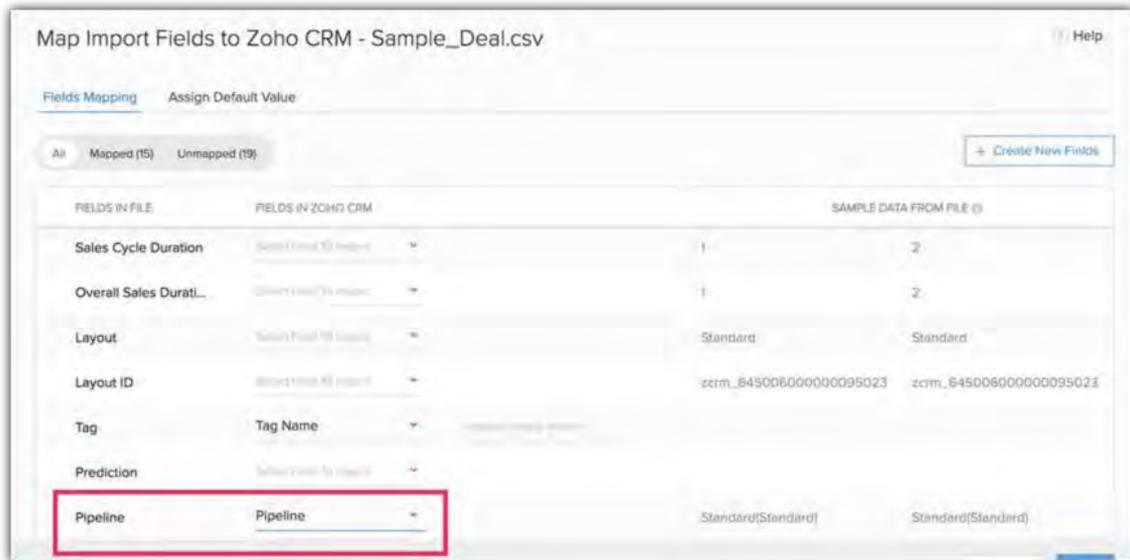
Note

- If you include a new stage in the blueprint, it will be automatically added to the pipeline.
- If a pipeline is deleted, any blueprints created for that pipeline will also be deleted.

Importing data based on the sales pipeline

When importing records, the Pipeline field needs to be mapped so that deals are automatically assigned to the respective pipelines.

- **Importing deals for a different pipeline:** If you want to import records that belong to different pipelines, you need to add a column to the import file for details of the pipeline that the record belongs to. Map this field with CRM's Pipeline field when you import.
- **Importing deals for the same pipeline:** Pipeline is a mandatory field, so if the import file does not have the pipeline details then all the imported deals can be assigned to one selected pipeline. You can select a pipeline in *Assign Default Value*.



Note

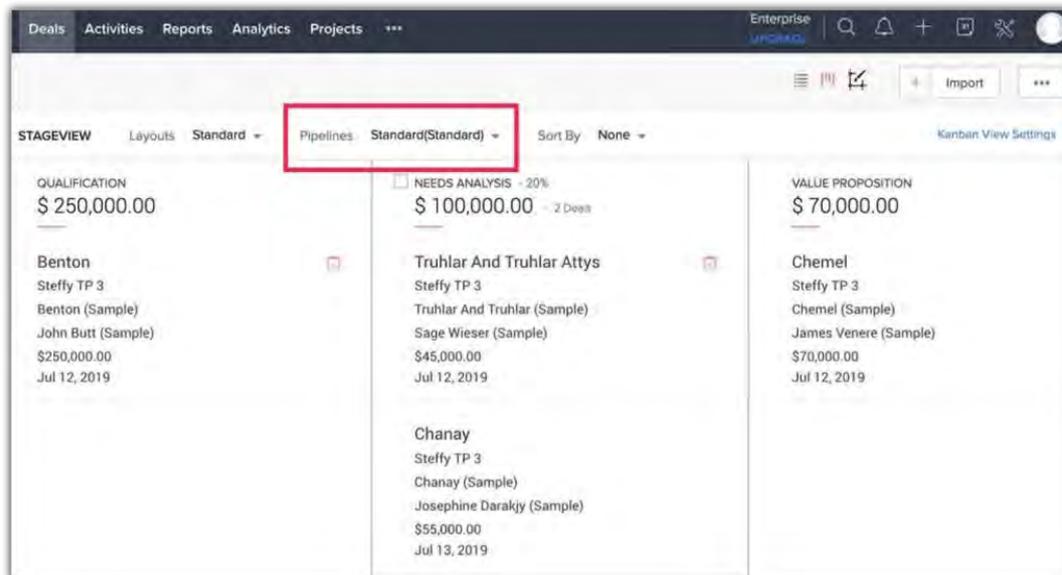
Layouts, pipelines, and stages are dependent on each other, so you should expect records to be skipped in the following situations:

- **Layout-pipeline mismatch:** While importing, you need to specify the layout the records will be imported to. If the deal's pipeline does not belong to the selected layout, the record will be skipped due to the layout-pipeline mismatch.
- **Pipeline-stage mismatch:** If the deal's pipeline belongs to the selected layout, the system will check the stage selected for the record. If the stage value is not part of the deal's pipeline, the record will be skipped due to the mismatch.

In the import history, you can check the records which were skipped and the reasons why.

Kanban view

Deals in a Kanban view can be filtered based on the layout and pipeline.



Migrating data

When you migrate from another CRM, the Pipeline field will be available during field mapping. The deals will be assigned to the layout's pipeline based on this field.

If the deals that to be migrated do not have a pipeline associated with them, they will be associated with the default pipeline in the selected layout.

Deleting a sales pipeline

To delete a sales pipeline

1. Go to Setup > Customization > Pipelines.
2. Hover over the ellipsis and click **Delete**.
If there are records associated with that pipeline, you have to transfer them to another pipeline before you can delete it.
3. Select the pipeline you are transferring the data to.
4. Map the stages from the old pipeline to the new pipeline.
5. Click Transfer and Delete.

Delete **Standard(Standard)**

Please transfer the associated deals to another pipeline and then delete it.

Transfer To

Stages in Standard(Standard)

Qualification	<input type="text" value="Select Stage"/>
Needs Analysis	<input type="text" value="Select Stage"/>
Value Proposition	<input type="text" value="Select Stage"/>
Identify Decision Makers	<input type="text" value="Select Stage"/>
Proposal/Price Quote	<input type="text" value="Proposal/Price Quote"/>
Negotiation/Review	<input type="text" value="Negotiation/Review"/>

 Closed deals will be retained in the deleted pipeline.

Note

- Deals that are already closed will be kept in the deleted pipeline and will not be transferred to a different one.
- When a layout is deleted, you can choose the layout to move the records to. If the layout the records are being transferred to has a pipeline, then you can choose the pipeline and the stage the records from the deleted layout will be transferred to.
- Closed deals from the deleted layout will be transferred to the default pipeline of the new layout.
- If a record is locked due to an approval process or review process in the Pipeline or Stage field, it will not be transferred to another pipeline when its pipeline or layout is deleted.

Wizards

What is a Wizard?

A Wizard helps you divide a long form into a series of screens, where users can enter data on each screen as they proceed to the next step until completion. A step-wise approach is less overwhelming and reduces chances of erroneous data entry, as the partially completed form can be saved as draft and submitted later.

Wizards are typically helpful when:

- you want users to complete the form only in a systematic sequence
- there are several steps involved in accomplishing something
- you want users to be able to save the form as a draft before submitting

Feature availability

Users with Administrator profile permission can create, edit, and delete Wizards. The number of wizards you can create depends on your CRM edition.

- Enterprise: Total 5 wizards/org (2 wizards/module)
- Ultimate: Total 25 wizards/org (5 wizards/module)

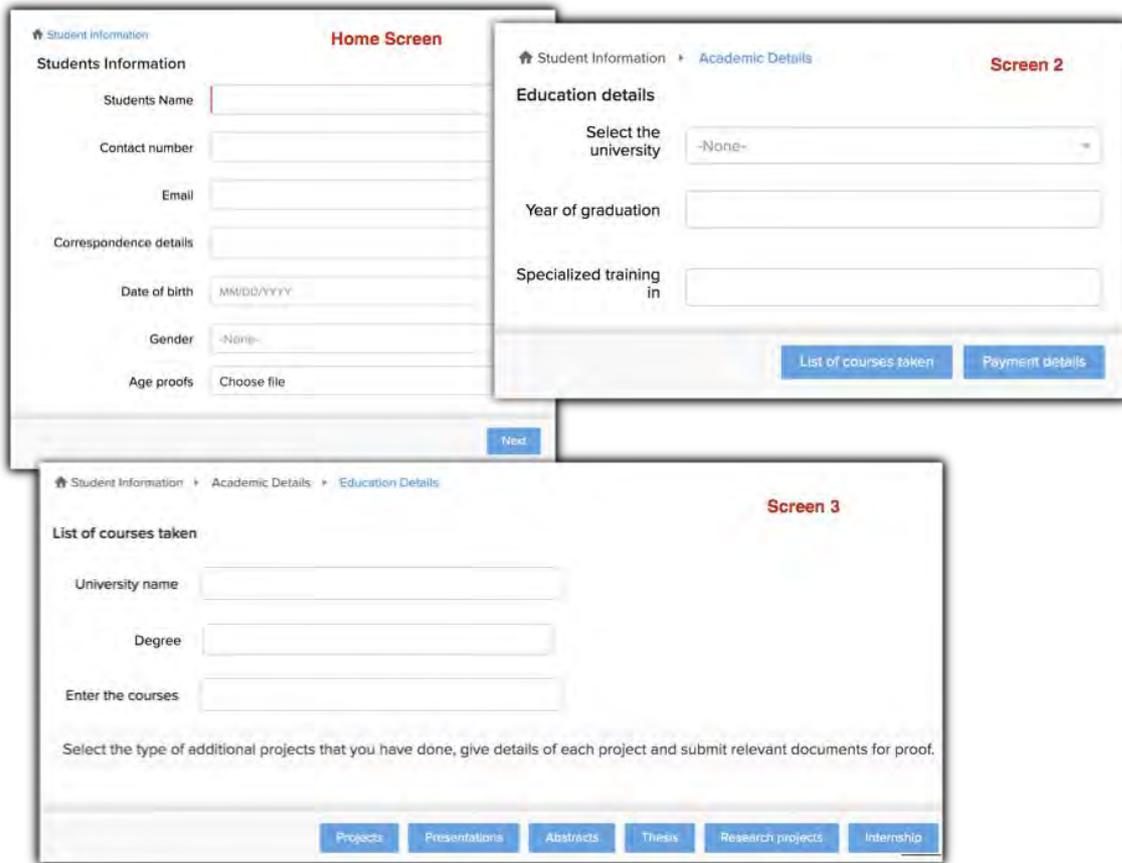
Recommended use cases

Displaying different sections of a record such as user details, employment history, educational qualification, insurance details etc., in single view can cause confusion. Instead, showing each section as separate buttons in the home screen will allow the reps or agents to navigate between the sections easily based on the customer's interest.

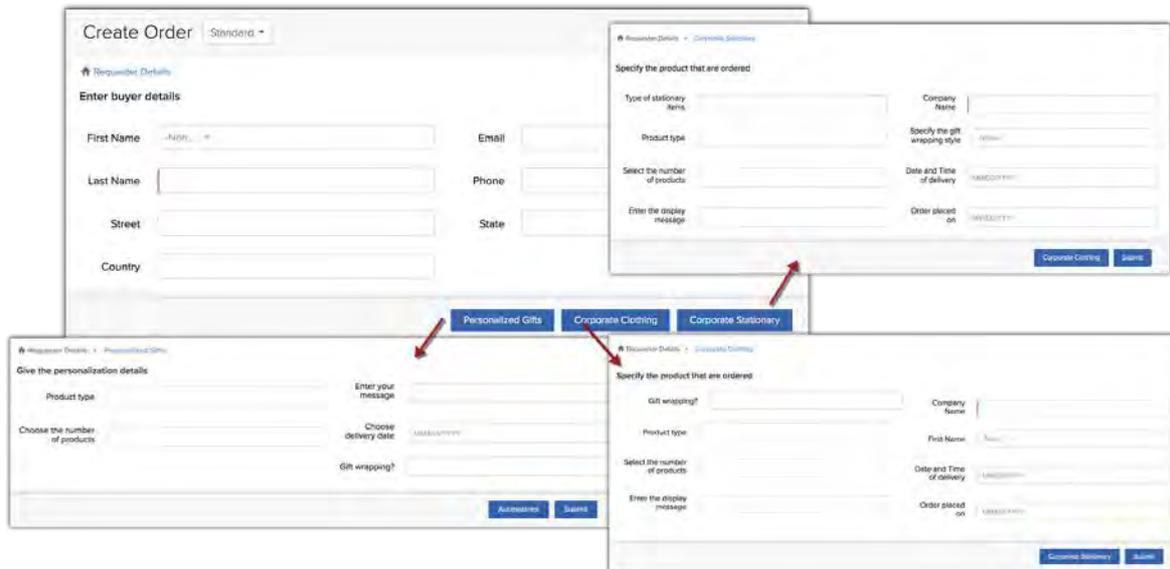
This approach can be helpful in processes where the application forms are extensive and the user wish to skip a few details at the moment like loan application, property selection, visa submission etc.

Insurance form: A simple, interactive form for purchasing insurance makes filling forms much easier and smoother.

University admission form: The application form for admission to university is much comprehensible and clutter free with the help of a wizard. Separate screens are used to capture additional details like projects, presentations etc. which reduces the chances of overlooking important details during form submission.



Product purchase form: Single product order form is divided into different sections, the agents can pull the form that they need to fill based on customers' interest.

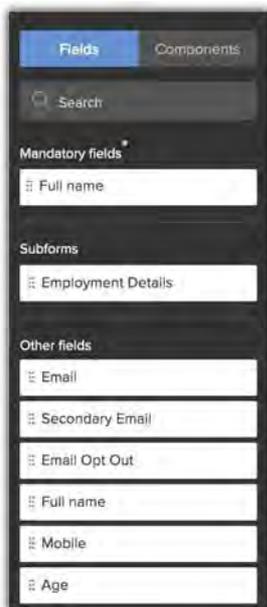


Creating a Wizard

In Zoho CRM, you can customize the record detail page using wizards, to segment a single form into several concise segments. Each section will appear as a screen and the user can navigate across the screens using buttons such as next, save, more etc. You can create wizards in both standard and custom modules and also across different layouts (you can add upto 4 layouts).

You can select the fields that should appear in each section and use different formatting options to design a unique form (wizard) to suit your business requirement. A wizard consists of following elements:

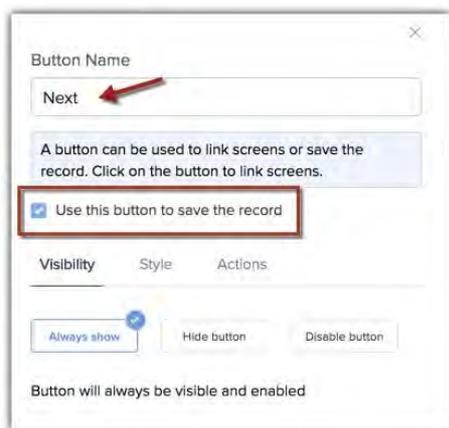
Fields: All the fields, sections, and subforms that you have added to the layout will be displayed under the Fields tab. You can drag and drop the desired fields into each segment. *Note that, you cannot create a field from this screen.*



Components: Currently, we are supporting a single line component. You can add up to 5 components in a screen.



Buttons: Buttons can be used to save a record or to link different screens. In a single screen you can add up to 10 buttons. You can use only one button to link a screen. Depending on the action that you want these buttons to perform, you can name them: **Save, Next, Edit, Product name** etc. You can specify if a button should be used to save a record by checking the **Use this button to save the record** option. For example, you can check this option to ensure that the record is saved when the **Done, Submit** or **Save** button is clicked by the user.

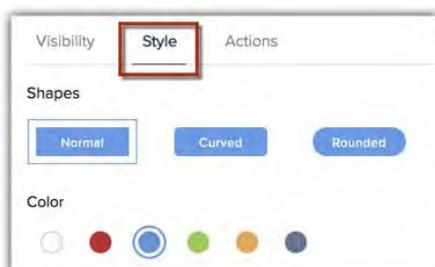


For each button you can define the visibility, style, and actions.

- **Visibility:** You can set the visibility of the button to: always show, hide button or disable button. Also, you can set conditions when the button should be hidden or disabled, for example, if the correspondence address and email address fields are empty the Next button should be disabled/hidden.

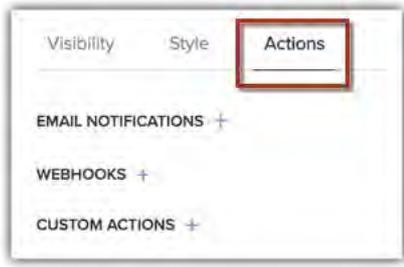


- **Style** - You can select the shape of the button as normal, rounded or curved and choose a color from the available options.



- **Actions** - You can set actions like sending email notifications to the record owner whenever the Submit button is clicked. You can also set actions using webhooks or write

your own custom actions. For example, you can write a webhook to notify the students when their application form is submitted to the university portal.



To create a wizard

1. Go to Setup > Customization > Wizards.
2. Click **Create Wizard**.

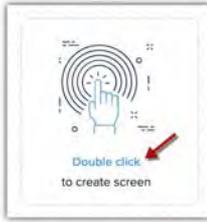


3. In *Create a Wizard* page, enter the **Wizard Name**, select a **Module** from the drop-down list and choose the **Layouts**.
4. Click **Next**.

A screenshot of the 'Create a wizard' form. It has a title 'Create a wizard' at the top. Below the title are three input fields: 'Enter wizard name' with the text 'Application Form', 'Choose module' with a dropdown menu showing 'Students', and 'Select layouts' with a dropdown menu showing 'Standard'. Below these fields is a small note: 'You can add or remove layouts anytime.' At the bottom right, there are two buttons: 'Cancel' and 'Next'.

5. In the *Design* page, **Double click to create a screen.**

You will be redirected to the wizard design page.



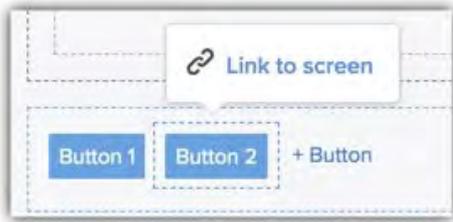
6. In the wizard designing page, do the following:

- a. Enter the **Screen Name**.
- b. Enter the Segment Title.
- c. In the *Fields* tab, drag and drop the required fields into the segment.
- d. Click the *Components* tab and drag and drop the **Text Component**. Type your content.
- e. Click **Button** and enter a name.
- f. Check Use this button to save the record, if needed.
- g. In the *Visibility* tab, select **Always show**, **Hide** or **Disable** button. Click **Set Criteria** to define conditions for the Hide/Disable functions.
- h. In *Style and Actions* tab, select a desired option.
- i. Click **Done**.

You will be directed to the main design page, where you can add further screens.

7. In the wizard design page, drag and drop the cursor from the button(s) to add another screens.

Alternately, you can click **Link to screen** option over the button.



8. Follow step 6 onwards to add fields and buttons on the subsequent screens.
9. Click **Save Wizard**.

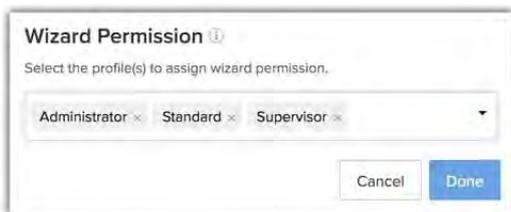
Manage Wizard Permission

You can select the profiles that should have access to a particular wizard. However, note that the layout permission will override the wizard access permission. That is, if the sales reps have restricted access to layout A, then even though they have permission to access the wizard, they will be unable to view the layout. Therefore, you must make sure the profiles that you give access to wizards have layout permissions enabled.

To manage wizard permission

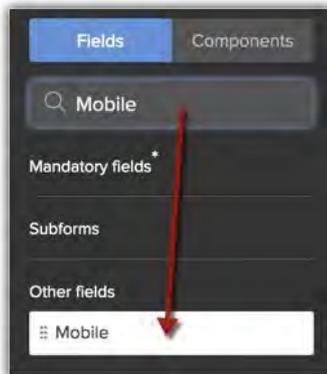
1. Click **Manage Permission** from the top panel in the wizard design page.
2. Choose the **Profiles** and click **Done**.

You can edit the permissions by adding/removing profiles after setting up the wizard.

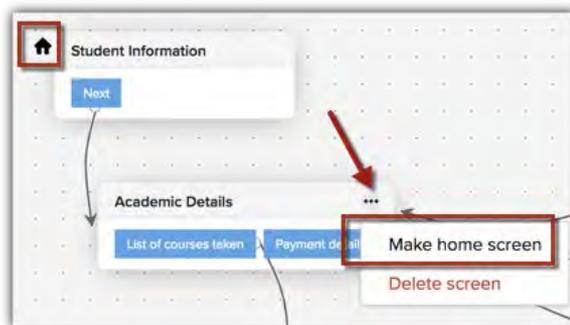


Points to remember

- Type the name of the field in the search box to find a field quickly.



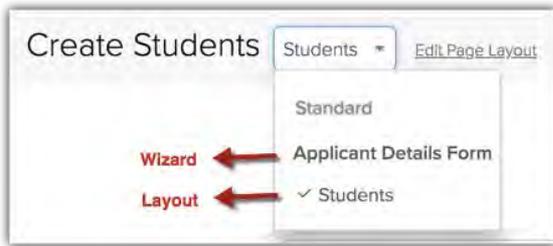
- By default the first screen will be considered as the home screen (a home icon will be added to the screen). However, you can click the more icon in any screen and make that as the home screen. You can also delete a screen from here.



- To avoid getting errors while saving a wizard, be sure to do the following:
- We have listed out all the mandatory fields: system defined and user defined mandatory fields, separately under the **Fields** tab for easy identification. Make sure you add these fields to the screens before saving the wizard.
- Assure that you don't have orphaned screens or buttons. That is, all the screens must be connected to the buttons (unless the button is used to save the record) and vice versa.
- You have added a button that is meant to save the record.
- Click **Discard Changes** to remove all the configurations that you have made and start designing afresh.

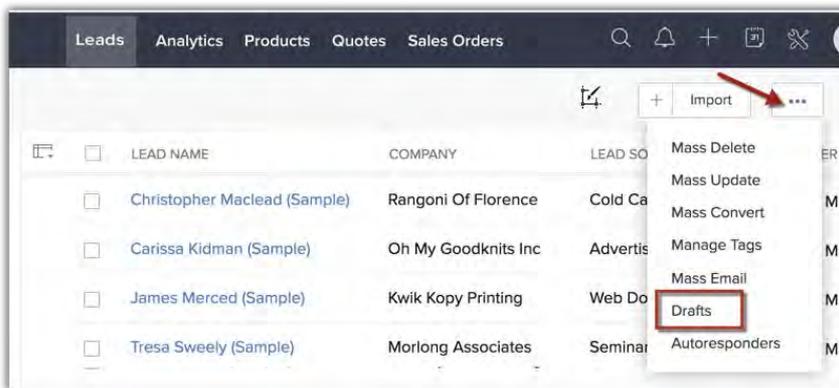
Creating records in Wizard

The CRM users who have permission to access the wizard and also have permission to access the particular layout can add a record using the wizard. The user must select the desired wizard layout from the drop-down list within the module and add the record's details, the buttons will guide them to navigate through the entire form.

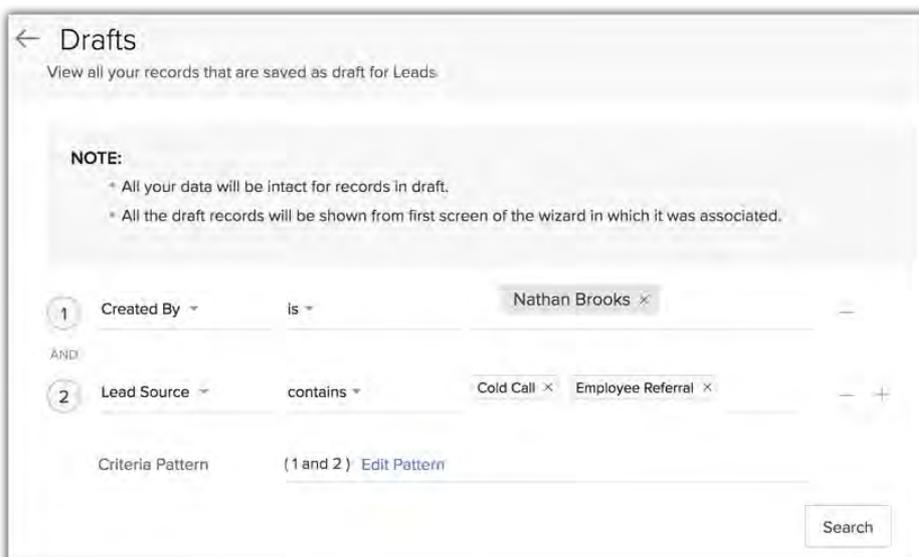


Saving the record as a draft

You can save a record whose details are partially filled as a draft and enter the remaining details later. These forms can be accessed by clicking on the **Drafts** option from the *More* icon in the module list view. Once the record is saved it will be removed from the drafts and added to the list view.



You can use the criteria to filter drafts from the list of drafts.



Note that, a draft will also be saved when an action like email notification, webhook or custom function is configured in a screen for a button. For example, if an email notification is configured for the a button, then the screen on which the button was added will be saved as a draft for your reference. The draft record will also be available under audit log.

Deleting or deactivating a wizard

You can delete or deactivate a wizard that is not in use. However, remember the following points before you choose to deactivate or delete:

- Deleting a wizard will remove the configuration and any draft records that are associated with it. Also, this operation cannot be reverted.
- Deactivating a wizard will remove all the draft records that are associated with it. You can activate a wizard when required.

List of error messages

While creating a wizard you will come across the following error messages:

- Orphan screens: If the screen is not connected with another screen.
- Save button not valid: If the save button in a screen is set before adding all the system mandatory fields.
- Invalid buttons: If the button is not configured to the save action or not linked to another screen before you save the wizard.
- No option to save: If a screen doesn't have a save button.
- Looping: If the buttons are connected in a way that the action starts and ends on the same screen. In other words, the start and end actions cannot be on the same screen.
- Save button missing: If save button is not configured before saving the wizard.
- Empty wizard: If screens are not added to the wizard.
- Duplicate name: If the entered wizard name already exists.
- Mandatory Fields missing: The screen does not contain all the mandatory fields
- Button has no save or transition: Invalid screen setup. No save button or path found.

Workflow Suggestions by Zia

Many regular activities like sending emails to customers or stakeholders, allocating tasks to the team members or updating details usually take up more time that you expect. It can be helpful to automate these activities and utilize the time on other essential tasks.

It may seem overwhelming to identify all such activities and create a process to automate them at the desired time and situation. Zia can help you identify repetitive manual activities and suggest a well-executed workflow to automate the process.

Note

- Users with Manage Automation permission can view the workflow suggestions.
- Zia will suggest workflows for Leads, Contacts, Accounts, and Deals module.

Feature Availability

Available in the **Enterprise** and **Ultimate Editions**

Enable or Disable Workflow Suggestions by Zia

The workflow suggestions by Zia will be enabled by default. You can disable the suggestions if it is not required.

To enable or disable workflow suggestions

1. Go to Setup > General > Zia > Zia Recommendation.
2. Enable or Disable the **Workflow Suggestion**.



View Workflow Suggestion

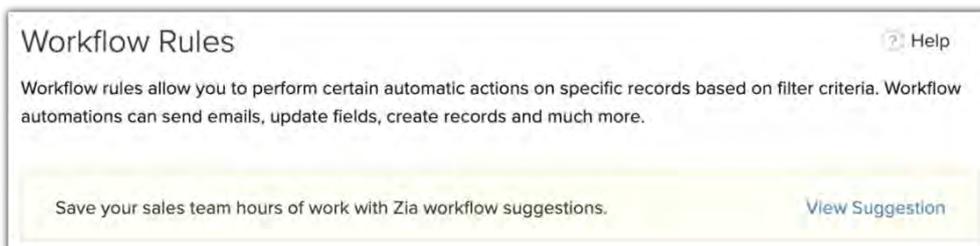
Zia suggests workflow rules by analyzing the recurring actions that you have performed. When there is a suggestion from Zia, you will be notified and can be viewed by clicking on the **Zia** icon at the bottom right corner. If you miss the notification, you can always view the suggestion from the *Workflow Rules* page. You can modify the suggested workflow by adding/removing a criteria or action. If the suggested workflow doesn't suit your requirement, you can remove it.

To view and modify workflow suggestions

1. Click the **Zia** icon (from the panel at the bottom) and select the message. You can preview the suggested workflow.



Alternately, go to Setup > Automation > Workflow Rules > View Suggestion.



2. Click **Create as Workflow**, to configure the suggested rule.
In the *Workflow Rules* page, click **Preview > Create as Workflow**.



Zia suggested Workflow for Contacts

It looks like a few of your routine activities could be automated. Save your sales team 10 minutes of work with Zia workflow suggestions.

WHEN: Record Action [Create](#)

CONDITION: This rule will be executed for all Contacts.

Instant Actions

Tasks: [Schedule demo](#)

[Create as Workflow](#)

Suggestion
Save your sales team hours of work with Zia workflow suggestions.

Attention
50% of 6 Potentials created in the last 1 week(s) are not touched by any Workflow rule(s).

Attention
100% of your Leads are without any email follow up for the past 7 days.

Attention
100% of your Contacts are without any email follow up for the past 7 days.

Attention
75% of your Potentials are without any email follow up for the past 7 days.

3. Click **Save**.

You can also modify the workflow, if required.

4. Click **Remove** to remove the suggested workflow rule.

Record Owner Suggestions by Zia

[Assignment rule](#) is designed to help you automate the process of lead assignment. You can configure different criteria per your industry's specifications like territory, product interest, lead source etc., based on which the leads will be automatically assigned to the selected rep.

You can either choose the users manually or select users suggested by Zia.

Region based allocation

@ Leads

Description

Create Rule Entry

Apply this rule to

All Records

Records matching certain conditions

Assign record to

Category

Users - Select Users

Users matching certain conditions

Zia suggested user

Would you like to check user availability before assigning ?

Yes

No

Followup Task

+ Add Task

Save Rule Entry Cancel

Note

- Your CRM account must have 1000 records for Zia to understand the existing record assignment pattern and make suggestions.

- Zia observes the record management pattern and takes all the below parameters into consideration for suggesting an appropriate record owner:

- **Existing pattern**

Zia will skim the records and identify the existing record assignment pattern. Let us consider that you assign records based on the product type and the geographic location of the customers.

- Customers from New Jersey who are interested in Mutual Funds must be assigned to Catherine Ross.
- Customers from **Georgia** who are interested in **Corporate Fixed Deposits** must be assigned to Roxanne Murphy.

So, Zia will observe this pattern and suggest an ideal user if the incoming records match similar conditions.

- **Everyday activities of the reps**

Zia will observe the type of communication a user mostly performs: email communication or calls. She will draw a pattern from the observation about the user's preferential mode of communication.

For example, if user A mostly manages email communication then the records that have value in the email field will be assigned to user A. Similarly, if the email field is empty and phone number field has a value, then that record will be assigned to a user that mostly manages calls.

- **Online status of users**

While setting the assignment rule if you check the "user availability before assigning record", then Zia will take into consideration a user's online status, namely if the user is logged in to CRM or not. If the user is not logged in, the record will be assigned to the default user.

- **Users' workload**

Zia will suggest a user based on the number of records they manage in a day. For example, if user A manages 50 customers in a day and user B manages 30 customers, then Zia will check if they have reached their maximum limit before suggesting. Zia calculates the threshold limit and suggest users who have less records as per their daily limit and she keeps a check on overloading the users.

Zia for Emails

Most business communication and transactions happen over emails, be it with customers, prospects, partners or vendors. Besides being an essential mode for communication, emails are an official repository for important information details on meeting schedules, events, business agendas, addresses, invoices, social handles, etc. are available on emails and sales representatives may spend quite a lot of time in entering such details manually into the CRM database.

In Zoho CRM, Zia can help them capture important information such as customer's personal information or details of an event right from the emails. Furthermore, without even having to read the entire conversation, one can know the intent of the email, as in, a request, a query, or complaint as suggested by Zia.

Data Enrichment from email signatures

In professional emails, signatures are considered as one's corporate identity as they contain information about the sender. It carries details about their role in the company, their social handle, and contact details. People even use email signatures to create brand recognition, drive traffic to their website, or promote events.

When such valuable information is available in signatures, why not let Zia help you capture the details in your CRM account. Zia's Data enrichment from email, facilitates data population for leads, contacts, and accounts from the email signatures. Details like email address, website, contact number, company name, social handles, designation, company location, and address mentioned in the email signature can be captured into CRM record. It will help reduce the time and effort that is needed to update a record manually and additionally ensure the accuracy of the data.

In CRM we have identified some fields that are commonly used such as fax, designation, phone number, last name, email etc. and termed them as "enrichment fields". But, as there may be a possibility of referring these fields with different names in the CRM account, to avoid confusion or incorrect data entry we let you map these enriched fields with the right CRM field.

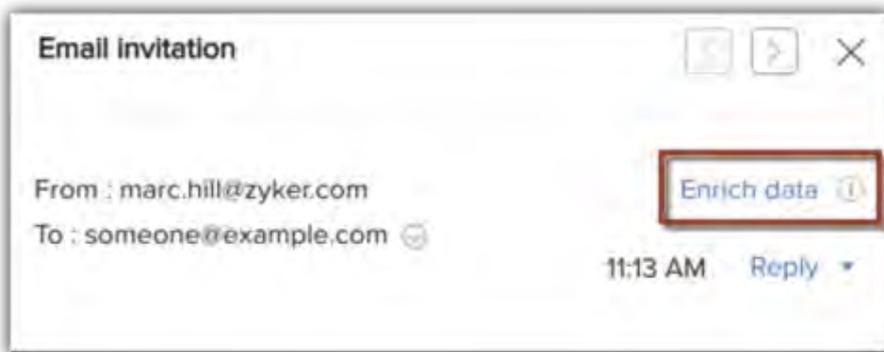
Note

This feature is available only in the Leads, Contacts or Accounts modules. Only the users who have permission to access these modules can use the feature.

To enrich data from email signatures

1. Select a record from Leads, Contacts or Accounts module.
2. Open an email from the record's related list.
3. Click **Enrich Data**.

Note: If there is no new information you will receive a notification from Zia stating the same.



4. In the *Data Enrichment by Zia* page, click **Configure field mapping**.



- In the *Enrichment Settings* page, under Zoho CRM fields tab choose the fields from the drop-down list.

Enrichment Fields	Zoho CRM Fields
Designation	Title
Fax	Fax
Phone	Mobile
Other Phone	Home Phone
Email	Email
Industry type	Business vertical

- Click **Save**.

Note

- If you have already installed the "[Data Enrichment](#)" plugin in your CRM account, few global or company based information will be auto-populated from the internet. If required, you can overwrite those fields with the information retrieved from the email signature. You can instruct CRM to do so by selecting the checkbox of the respective fields under the **Update** tab.

Data Enrichment by Zia

Zia has discovered the following data related to the Email "someone@example.com"

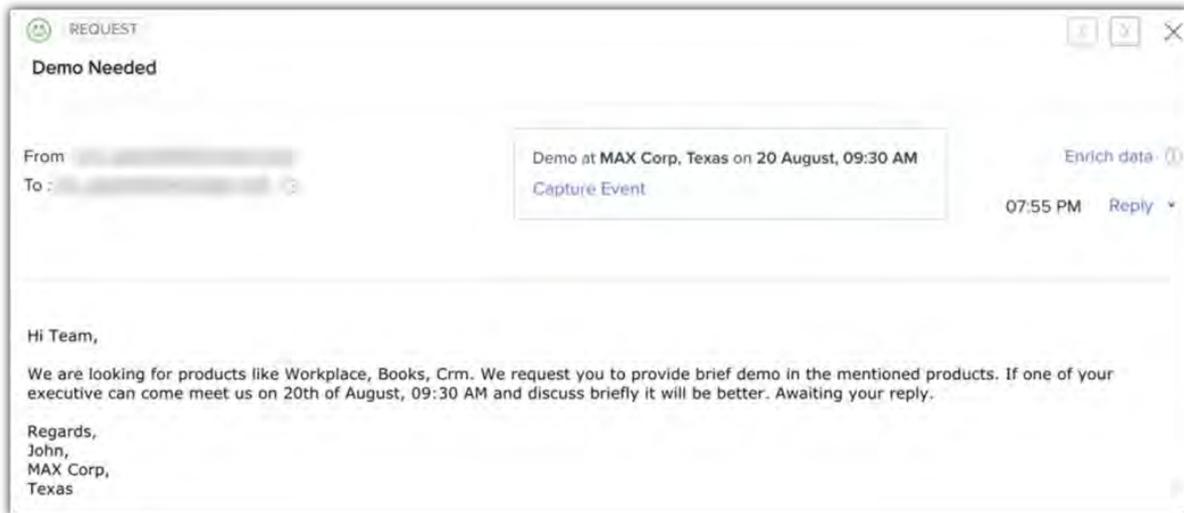
ZOHO CRM FIELDS	VALUE	UPDATE	ENRICHMENT VALUE
Contact Name	Michael	<input checked="" type="checkbox"/>	Michael Milford
City	US	<input checked="" type="checkbox"/>	New York

[Configure field mapping](#)

- You can use both the plugin and the email signature to enrich your CRM data. The former can enrich any global information on the record from the internet, while the latter can enrich personal information of a record.

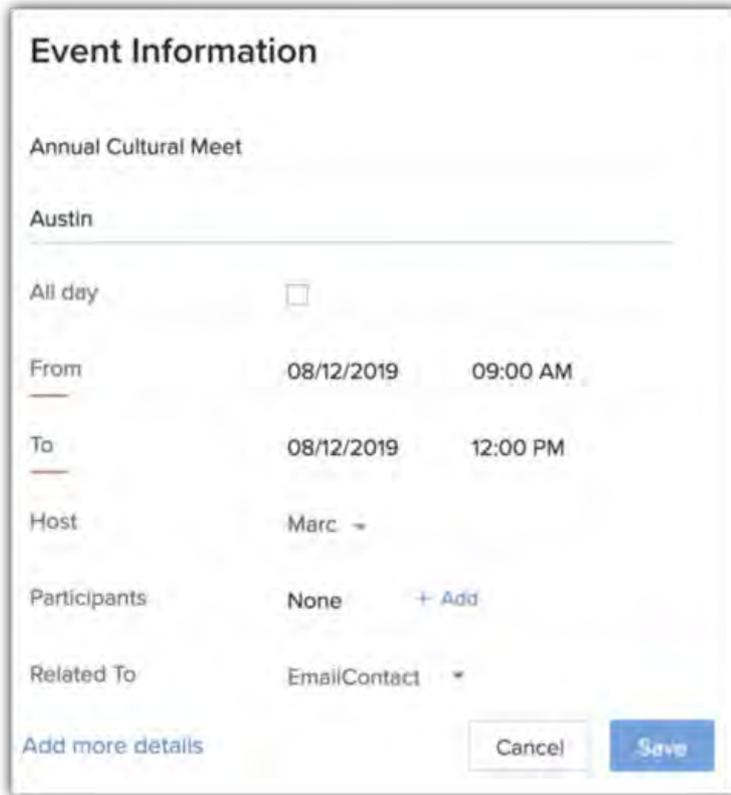
Events suggestion in an email

Customers or leads often send emails requesting for a product demo to understand the product before they begin working on it. From those emails Zia can capture the terms like demo, product, and recently released items and suggest it as an event. If you want to add such type of request as an event for the record in CRM, you can click the **Capture event** button and add the details.



To create an event from the email

1. Open an email and click **Capture Event**.
This link will be visible only if Zia identifies event related details in the email.
2. In the *Event Information* popup, view the populated details of the event.
If required, you can add/edit the details.

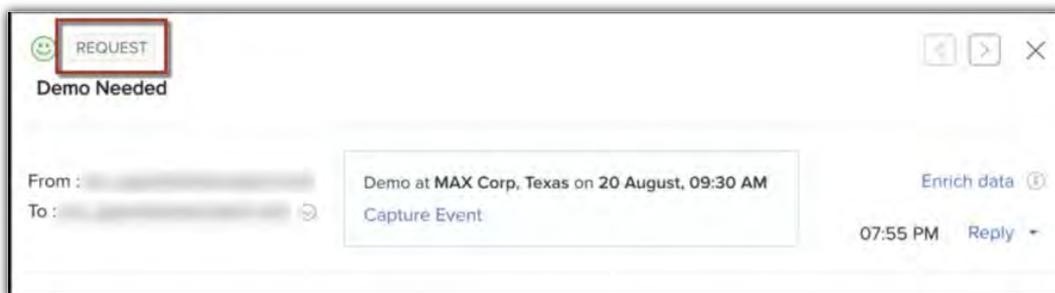


The image shows a 'Event Information' form in Zoho CRM. The title is 'Annual Cultural Meet' and the location is 'Austin'. There is an 'All day' checkbox which is currently unchecked. The 'From' field is set to '08/12/2019 09:00 AM' and the 'To' field is set to '08/12/2019 12:00 PM'. The 'Host' field is set to 'Marc'. The 'Participants' field is set to 'None' with a '+ Add' link. The 'Related To' field is set to 'EmailContact'. At the bottom, there is a link 'Add more details', a 'Cancel' button, and a 'Save' button.

3. Click **Save**.

Intent of an email

Zia will monitor the email conversations and highlight the intent of the received emails. She will understand the email content and capture the following intents: request, query, complaint, and others.



Zia Recommendation

Recommendation tool and its benefits

A recommendation tool uses artificial intelligence to identify and analyze customer data such as their purchase details, interests, requirements, and behavioral patterns to suggest the most relevant product. It also compares the behavioral patterns of other customers with similar attributes to recommend the right product or service.

With the help of a recommendation engine, you can bring a significant difference to the overall revenue, sales, purchases, conversions, click-through rates, cross-selling, and up-selling in your business. Furthermore, you can use the suggested results to modify every aspect of your marketing activities.

Feature availability

Users with Administrator profile permission can configure recommendation models. The number of models you can create depends on your CRM edition.

- Enterprise: 1 recommendation/org
- Ultimate: 10 recommendations/org (1 per module)

Zia recommendation tool

Zia recommendation is a self-learning tool that recommends the right product for the right user at the right time by understanding the behavioral pattern of the entire customer base. We have outlined some common areas where you can use the recommendation tool to pitch the right product to your customers:

Real-estate: The agents can suggest the most suitable property based on the customers' previous purchases and the attributes that they seek in a property. For example, a customer looking for an upscale condo with 4+ bedrooms, 150-200 Sqft with amenities like outdoor parking and courtyard, can be suggested similar apartments in and around the preferred location. The recommendation tool will understand the customer's preferences from the above specifications and suggest properties that have similar attributes, reducing the manual effort needed to filter the entire property listing and scouting the right one. Also, you can reduce the time and money invested in lead nurturing campaigns by sending audience-specific content, increase the chances of conversion, send personalized marketing content.

Online learning: Students who have subscribed for a particular course can be recommended similar courses based on the topic they have subscribed for, personal preferences and preferences of other students with similar characteristics. Based on the above results, you can suggest related materials such as interactive videos, assessments, supplementary education materials etc. to ensure better engagement. Zia's content-based filter lets you recommend more courses based on the current course content. For example, if a student has subscribed for *Foundation Course on Machine Learning*, you can suggest other courses that have related content like *Deep Learning, Neural Networks, Regressions* etc.

E-commerce: Customers are more likely to buy from you if they know you understand their requirements better. Therefore, in addition to suggesting products based on an individual's preference, buying patterns, and interests; Zia can use collaborative data filtering to suggest items that are often been bought alongside their product of interest. This will help you enhance the cross-selling and up-selling and definitely improve customer satisfaction and retention.

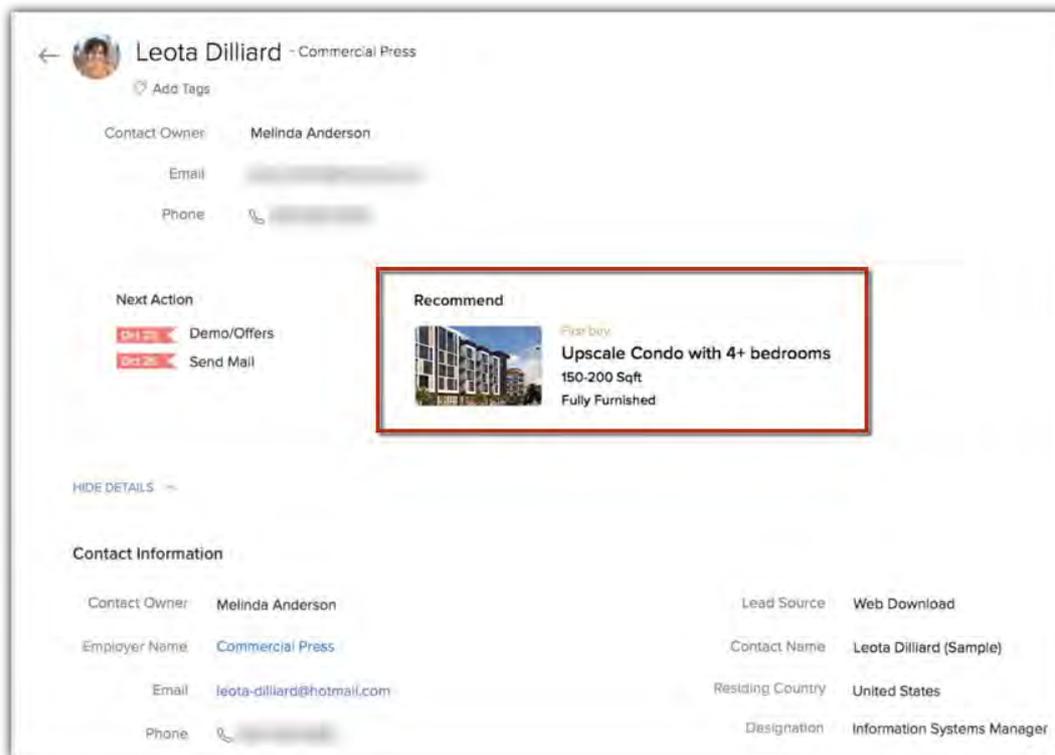
Configuring the recommendation builder

You can configure recommendations for standard and custom modules. Currently, these recommendations can be viewed only by the CRM users, because we aim at helping the sales reps, field agents and the like to provide better, faster, and relevant choices to the customers based on Zia's recommendations.

Setting up a recommendation model involves the following steps:

Selecting the source module: The module that contains information about what you want to recommend is a source module. You can define criteria, if you want to set up recommendation only for specific products.

Selecting the target module: The module that contains end user or customer information is the target module. It can be a standard or a custom module. For example, if you want to recommend courses for customers, leads or contacts, the latter's information must be in the target module. However, keep in mind that only those modules that are interrelated to the source module through a lookup field or related list can be selected as a target module. If you choose a module that is unrelated to the source module, the system will show an error message prompting you to choose another module. Once the recommendation model is set up, the system will display the recommendations within the target module. For example, here is an example of a recommended property displayed in the Properties or Apartments module. **You can create only one recommendation model per target module.**



Selecting the connecting module: A module that contains information about source and target module is an interlinking module. It is mandatory to select a connecting module because it will help Zia determine the successful transactions that take place in your business.

For example, **Deal** is the connecting module for **Product** and **Contact** modules, because it has all the information about the purchased products, date of purchase, type of customers who choose a particular product, other products that may have been purchased by them, type of products preferred by a group of customers.

Indicating the completion state of a process: The model can recommend the right product by analyzing the successful transactions that have taken place in your business. When a subscription is renewed, a deal is won, a product is purchased or a course is taken, they indicate successful completion of a sales process. These data are considered as positive values by Zia to make recommendations that best suit the customers with similar characteristics. These fields must be present in the *Connecting module*.

In addition to this you must select the data/time field that indicates the completion state of these processes, for example, purchased on, subscription renewed on, deal closed on etc. The date and time field will help Zia learn the frequency of purchases and recommend those items for repeat purchase, next purchase or items to be bought together etc.

To configure recommendations

1. Go to Setup > General > Zia > Recommendation.
2. In the *Builder* tab, click **New Recommendation**.
3. In *Create New Recommendation*, enter the **Recommendation name** and click **Next**.

4. In *Source*, select a **Module** from the drop-down list.
 - a. In *What [Module name] do you want to recommend?*, check **All records** or specify criteria and click **Next**.

- b. In *Source Module*, select a *Module* from the drop-down list.
 In *In Which [Target Module name] do you want to recommend [Source Module name] to?*, check **All records** or specify criteria and click **Next**.

- c. In *How source and target are connected?*, select a **Connecting module** from the drop-down list.

- d. In How do you want to indicate the [Connecting module name] completion state?, choose the fields and enter appropriate values.
- e. In Which date/time field will determine the above mentioned criteria from start to end?, select a field from the drop-down list.

4 How source and target are connected?
Which module establishes a relationship between Contacts and Products?
Connector Module Deals
How do you want to indicate the Deals completion state?
1 Deal Stage is Closed won
Which date/time field will determine the above mentioned criteria from start to end? Closing Time
Done

- 5. Click **Next**.
- 6. Click **Save**, to save the recommendation model.

Editing, Deleting or Deactivating a model

You can edit, delete or deactivate a model whenever necessary. Under the Builder tab in recommendation, you can view all the models that have been created. You can hover on a model and click the more icon to Edit or Delete a model. Similarly, you can toggle off a model to deactivate it.

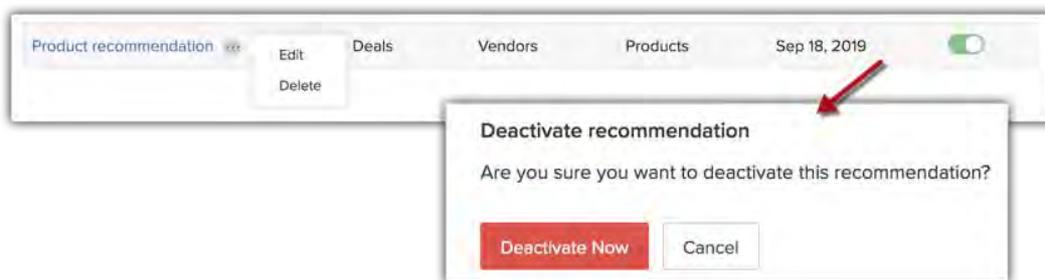


Image Validation by Zia Vision

Zia can recognize and classify images of living and non-living objects and alert whenever an invalid image is uploaded to CRM. Images of automobiles, stationary items, sports personnels, mobile phones etc. can be uploaded to train Zia in identifying objects of various kinds. You can use pre-trained object classifiers provided by Zoho CRM or images of your own for training purpose.

For example, a real estate agent can use image validation to validate property images, before adding them to the CRM system. The agent can send an image for approval from the senior agents when in doubt. By validating images before adding them to the property listings they can prevent invalid entries.

Feature availability

Users with Administrator profile permission can create, edit, and delete Orchestration models. The number of models you can create depends on your CRM edition.

- Enterprise: Total 1 rule/org (1 rule/module)
- Ultimate: Total 20 rules/org (2 rule/module)

Setting rules to validate images in CRM

Record images that are uploaded manually or enter CRM through API may sometimes be wrong or illegible. Zia can identify these images and help the reps take action to remove or replace them.

Setting up the image validation rule involves the following steps:

Records that need to undergo image validation: You can set an image validation rule for both standard and custom modules. You can define the criteria for records to undergo image validation. This can be helpful if you have a variety of record images in a single module, like both houses and villas in a *Properties* module or both cars and motorbikes in the *Vehicles* module, and only want the images of villas or motorbikes to be validated.

1 Rule name

2 Which record(s) do you want to consider?

Module

Criteria All Records Selected Records

Property type

Field to be validated

Field that contains the image: Currently we are supporting *Record Image* field only, so it will be preselected by default. Therefore, you can create image validation rule only for modules that support the **Record Image field**.

2 Which record(s) do you want to consider?

Module

Criteria All Records Selected Records

Field to be validated

Actions when Zia finds an invalid image: Zia will indicate if an image is invalid or fails to comply with the expected set of images. For example, if you have trained Zia to identify images of villas and individual houses, then an image of any apartment uploaded to the module will throw an error.

In event of invalidity of uploaded images, there are a set of actions that can be predefined for Zia to perform.

- **Do not create or update a record:** The record will not updated and no new record will be created when the image is edited.
- **Send image for approval:** Only the record image will be sent for the CRM admin's approval.

- **Send record for approval:** The entire record will be sent for the admin's approval. All the records sent for approval will be listed under the applicable image validation rule.
- **Create record by removing image:** A new record will be created in CRM without the record image.

Note: In case multiple rules are configured, a record will enter the rule that based on the configuration rules **that it matches**.

Uploading training data for Zia: You can upload either pre-trained images provided by Zoho CRM or images of your choice for training Zia in object identification. A minimum of 5 images must be uploaded. The training data is classified into two types:

- **Desired** images are the ones that you want a user to upload in CRM, for example villas. So, you can train Zia to identify villas by uploading at least 200 images of villas.
- **Undesired** images are the ones that you do not want a user to upload in CRM, for example, if you only want images of villas you can upload images of apartment buildings or shopping complexes or industrial spaces. This will help Zia to identify what is not a villa.

The pre-trained images are classified into categories, e.g.: food, cars, motorbikes, and bicycles. You can only upload one set of images at a time.



You can only upload images of one object type at a time. This applies to all three (desired, undesired, pre-trained) image types.

Best practices for uploading images

Take a look at the below cases that highlight the possible problems and the ways to troubleshoot them:

Case 1. A stationary supplier wants to validate images of pens and pencils received through bulk orders from the vendors. They upload the images of these objects as classifiers. However, when bulk orders are received most images of biros (ballpoint pens) are marked invalid.

Solution: The training data consists of images of all kinds of pens such as fountain pens, gel pens, marker pens, and pencils except ballpoint pens. Therefore, though Zia can identify a variety of pens it cannot identify a ballpoint pen and shows it as an invalid image. Hence, in order to get accurate result it is important to upload all images of all the objects that you want to be classified.

Case 2. A mobile phone dealer wants to validate images of smart phones. He uploads pictures of all the brands of smartphones he sells, but still some images of mobile phones are shown as invalid.

Solution: The dealer uploads front images of all brands of smartphones. However, some images that are taken from other angles are difficult to identify and draw similarity between objects. Therefore, it is essential to upload images of objects from various angles for ease of identification and accuracy of results.

Case 3. A distributor of toys and puzzles is confused because images of geometric or shape puzzles are identified as invalid objects though the same type of images have been used as classifiers.

Solution: A geometric shape appears similar from every angle thus uploading image of an object from either angles would always give accurate results. However, there must be enough images to draw similarity between objects. Hence, while uploading images of objects that may appear similar from all angles it is necessary to have at least 5 to 6 images (minimum requirement for Zia's image validation) of the object. We recommend to repeat one image 5 times for the system to draw correlation.

Points to remember

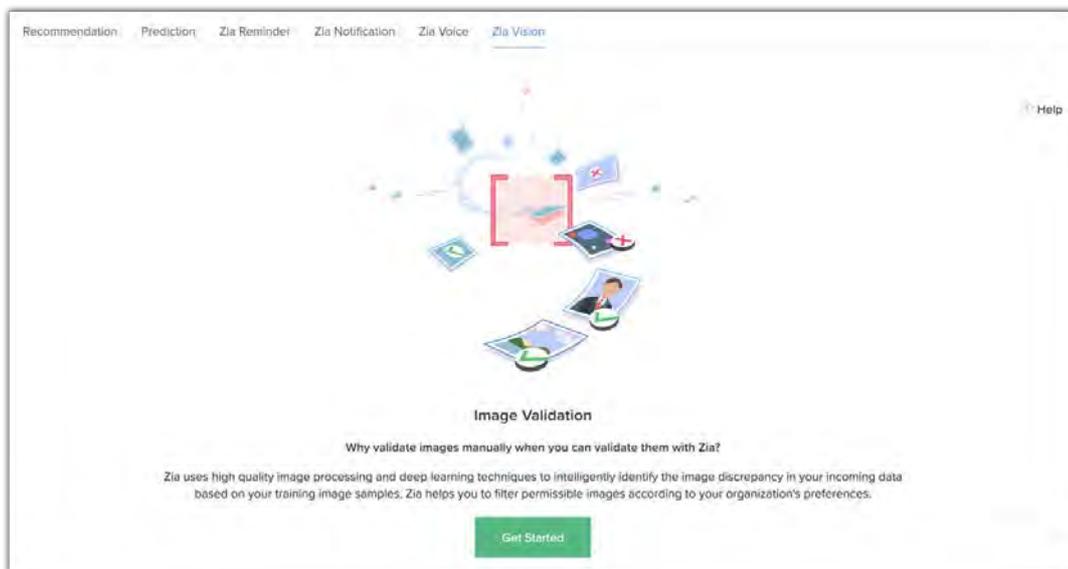
If you want to upload images from your desktop, you must follow these guidelines to achieve the best results from Zia:

- The images must be in these format: JPG, JPEG, PNG, GIF, BMP, and TIFF.
- The training data should be as close as possible to the data to be validated.
- In general, you should try to provide multiple angles, resolutions, and backgrounds in your training images.
- Vision models generally cannot recognize patterns that humans cannot. So if a human cannot recognize a pattern by looking at the image for around half to one second, the model probably cannot be trained to do it either.
- You can upload as many images as you want for a better accuracy, but minimum 5 images of a particular category must be uploaded for Zia to validate images.
- Do not combine images from different categories. Use images that best depict your category.
- The training accuracy score will be impacted if these guidelines are not followed.

Note: We calculate the accuracy of the image validation rule by evaluating all the points outlined in the guidelines. Only if a rule has a training accuracy above 80% the system will allow you apply it.

To create an image validation rule:

1. Go to **Setup > General > Zia > Zia Vision** and click **Get Started**.
If you have created rules before, click **New Image Validation Rule**.

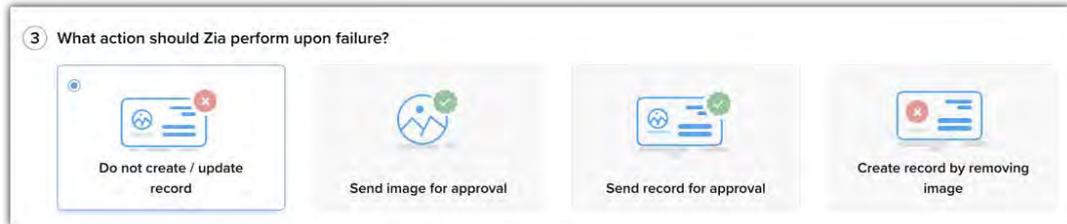


2. In *Create Image Validation Rule* page, enter the **Rule name** (e.g. Image validation for Houses and Villas).
3. In Which record(s) do you want to consider?:
 - a. Select the module from the dropdown list (e.g.: **Properties**).

- b. Set the criteria, either All records or Selected records (e.g. Property type is individual house or villa).

4. In *What action should Zia perform upon failure?*, select an option:

- Do not create or update record
- Send image for approval
- Send record for approval
- Create record by removing image



5. In *Upload Training Data*, upload **Desired** or **Undesired images**.

You can either choose from the gallery or upload your own images.

6. Click **Save**.

Delete or deactivate a rule

You can delete or deactivate a rule if required. If you have selected "approve the records upon entering the rule", then upon deleting the rule you will be notified about the records that are awaiting approval. Similarly, upon deactivating a rule the records that are awaiting approval will be retained, however new records will not be allowed to enter the rule. You can deactivate a rule from the image validation list view, by toggling off the status. To delete a rule, just hover on the rule and click the delete icon.

Zia Prediction Builder

Zia's prediction builder is a toolkit for CRM administrators to build custom predictions in their business. This simple and intuitive builder can quickly predict probable outcomes for both standard and custom modules.

Feature Availability

Available in the Enterprise and Ultimate Editions

Limits:

- Enterprise – 2 predictions per org, 2 predictions per module
- Ultimate – 20 predictions per org, 2 predictions per module

What can you predict?

You can use Zia prediction builder to predict growth by year, costs, taxes, salary expenditure, the likelihood of winning or losing a deal, the likelihood of a user buying a product, etc.

Business scenario

Zylker offers insurance solutions at competitive prices to both local and international customers. Their customer base is made up of small and medium-sized businesses from different industries. Since every customer's requirements are different, Zylker's reps are encouraged to have face-to-face discussions, visit customers' offices, share new policies and plans, and conduct surveys to learn more about their needs. For the company to reach their potential, they want to be able to predict:

- The different types of insurance a particular customer is likely to buy
- The likelihood of a particular insurance policy being bought in a specific customer
- The average revenue generated from different customers based on the type of insurance
- Any variations in year-on-year growth

These predictions can help them make better offers to their customers, modify existing sales and marketing strategies, and tweak current processes to increase the overall yield.

Specifications of the prediction builder

Supported data types

Before you start building a prediction model, you need to specify what exactly you want to predict. This is important for determining whether it's something Zia can help you with or not. Here is the list of data types that are supported by the Zia prediction builder:

- Date/time
- Number
- Boolean (Checkbox)
- Single Picklist

If your data is not in one of the above formats, Zia will not be able to make a prediction. You may need to add a custom field to store your data in the right format.

Supported modules

The prediction builder is supported for both standard and custom modules.

Data limit

The prediction algorithm can only work if you have at least 50 records that match the criteria that you used to train Zia.

Points to consider

- Use a unique name for each prediction for ease of identification. The name you choose will be used as a field label to represent the prediction output in the module. The configuration name cannot be edited once the prediction is saved.
- If you are predicting data for a picklist field, each value must have at least 75 records for the prediction model to work accurately. If one of the picklist values has more records than others, then there are chances of getting a skewed outcome because the data will be biased towards one type of value. Zia can make predictions for a maximum of 10 picklist values.
- If all the existing records have the same value for a number field, Zia will not be able to make predictions. For example, if a custom field - "number of children", has 2 as the value for most of the records, then Zia will not have any data to draw comparisons, and cannot make a prediction.

- If you make a time-based prediction, Zia will consider fields like created time as reference points to calculate future time points.
- Predictions cannot be made for fields that are generated via integration. Those fields will however, be considered as contributing factors for making predictions.
- Zia will take 24 hrs from the time of configuration to make predictions. The scheduler will follow the organization's timezone.
- The model will be retrained once every fortnight.

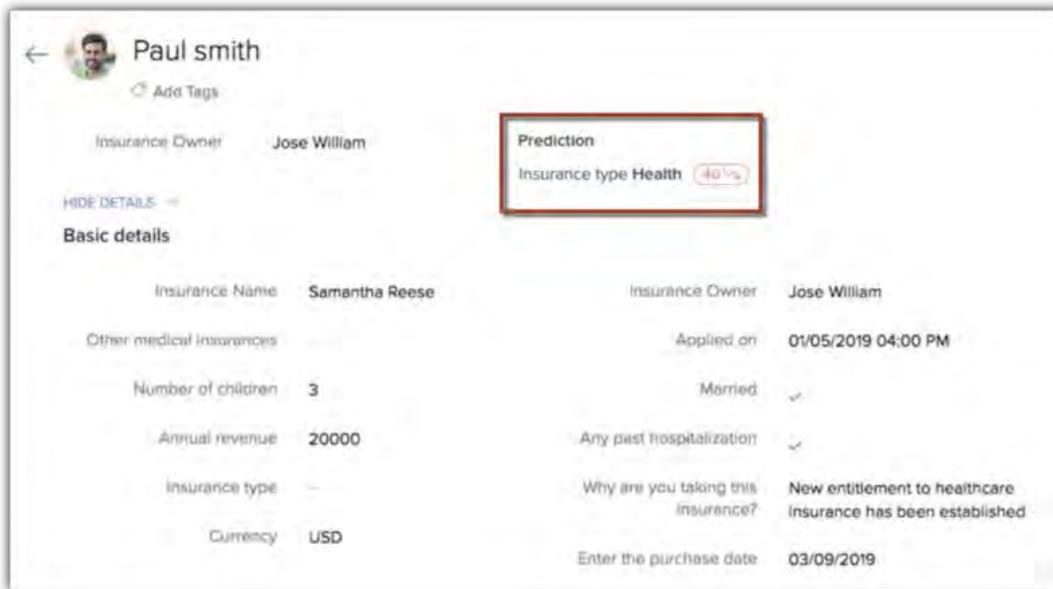
When to use which field type

You can plan and modify (if required) your data types in CRM based on the information you want to be able to predict:

- If you want to predict salary, expected growth, or revenue, you will need to have this data in **numerical or currency** fields.
- If you want to predict whether the user will buy a product, the likelihood of winning a deal, or whether a subscription will be renewed, the data will need to be in a **picklist** field.
- If you want to make time-based predictions like when a deal will be closed or a product be delivered, the data will need to be in a **date/time** field.
- If you want to predict likelihood for binary true/false or yes/no data (these values can be in **picklist or checkbox** fields) then the prediction result will be represented in terms of a percentage ranging between 0 to 100.

Where can you see the prediction outcome?

The prediction outcome will be displayed in a custom field that will be automatically created in the record once you configure a prediction. The field name will be the same as the prediction name. Therefore, it is recommended to use unique names that relate to the prediction value and are easily understandable within your organization.



Note: By default, the term "prediction" will be added to the custom field, so we recommend not to enter the term "prediction" in the prediction name.



Designing the prediction model

Once you have decided what you want to predict, the field that represents the value, and the module that contains the field, you are ready to build the prediction model.

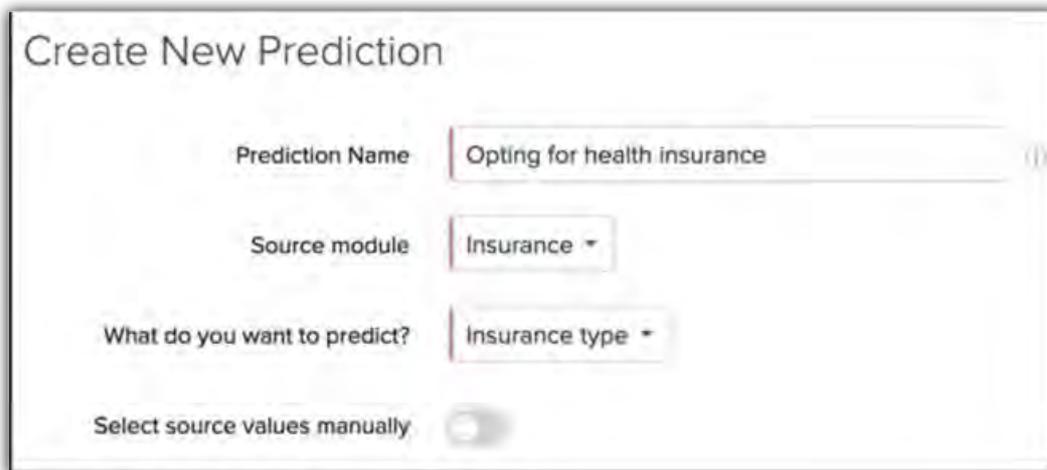
Components in the prediction builder

The Zia prediction builder consists of the following components:

Prediction name: Enter a unique name for the prediction builder for easy identification and understanding across your organization. The name you enter here will be used as a field label for the prediction results.

Source Module: Choose the module that contains the field which you want to predict. It can be either a standard or custom module.

What do you want to predict?: Select the field which has the information relevant to what you want Zia to predict. If Zylker wants to predict the likelihood of health insurance being bought by IT companies, it will select the picklist field called "Insurance type"..

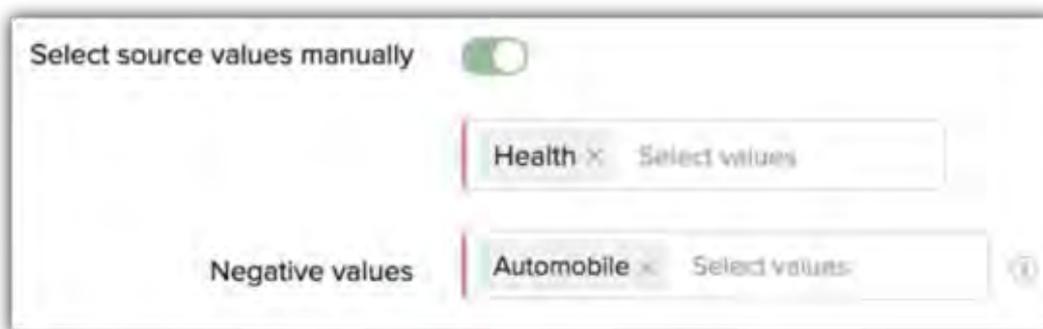


The screenshot shows a form titled "Create New Prediction". It contains the following fields:

- Prediction Name:** A text input field containing "Opting for health insurance".
- Source module:** A dropdown menu with "Insurance" selected.
- What do you want to predict?:** A dropdown menu with "Insurance type" selected.
- Select source values manually:** A toggle switch that is currently turned off.

Select source value manually: This field will be displayed only if a picklist field is selected for the prediction. You can toggle it if you want Zia to predict an outcome for selected values only. If Zylker wants to predict the likelihood of health insurance been purchased, we will select the picklist value "Health".

You can select multiple picklist values in a source value, for example, "health" and "personal accident". In that case, Zia will create a prediction for the selected values.



The screenshot shows the "Select source values manually" section of the form. The toggle switch is turned on. It contains two input fields:

- The top input field contains "Health" and "Select values".
- The bottom input field is labeled "Negative values" and contains "Automobile" and "Selected values".

Define negative values: Values that are unrelated to the data you want to predict are negative values. By defining these values, you will set a boundary for what data is relevant to Zia. In our example, you could select "automobile" insurance as a negative value.

Note: The option to select a negative value will be displayed only if you have selected a single picklist value in the source.

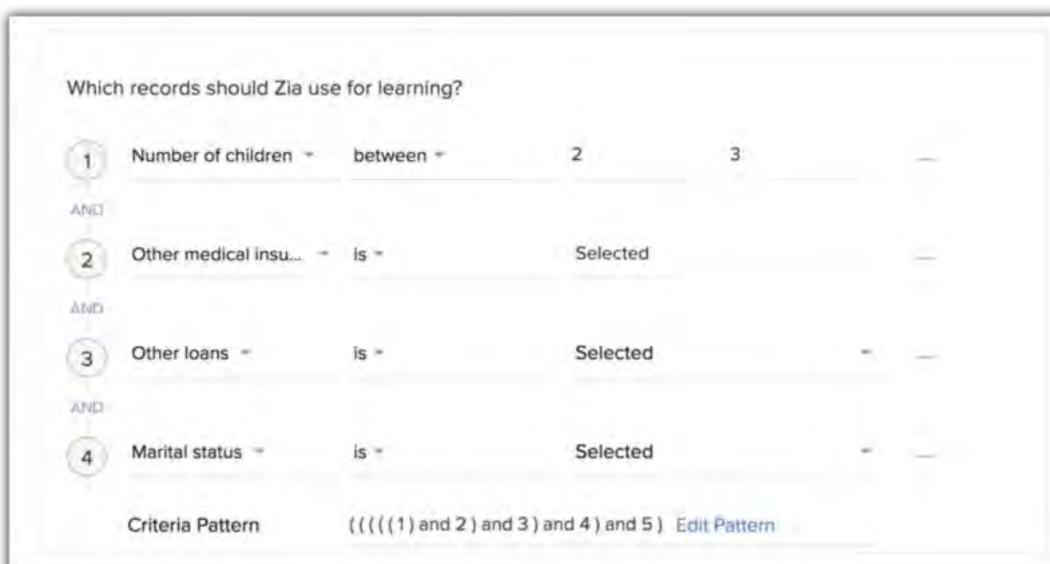
Filtering predictions: If you want only selected records to be considered for making a prediction, you can establish the criteria using the filter option. For example, Zylker wants to predict only if the IT companies would purchase health insurance, so they can use the filter to mention industry type as IT. Any record that doesn't meet this criteria will be excluded from the prediction.



Records that Zia should consider as learning data: If you want to predict a picklist field, it is not mandatory to define learning data. By default, Zia will take all the existing records into consideration for making a prediction—you should have at least 200 records with data related to what you want to predict. However, you can distinguish the records that have the right values by specifically selecting them.

For example, if family medical history, annual income, other medical insurance, marital status or age have values that will help Zia make the prediction, then you can select these fields as learning data.

Note: It is mandatory to select learning data for number, date/time, and boolean fields.



Creating a Prediction Model

You can build a prediction model for standard and custom modules.

To create a prediction builder

1. Go to Setup > General Settings > Zia.
2. Under the *Predictions* tab, click **New Prediction**.
3. Enter the **Prediction Name** and select a module [**Insurances**] from the drop-down list..
4. In **What do you want to predict?**, select the appropriate field from the drop-down list.
Toggle **Select Source Value Manually** to specify the fields.
5. Choose the field(s) [Health].
Only if you select a picklist field for prediction and choose a single source value, you must mention the negative value too. [Automobile].
6. Click **All records** [Insurances] or **Specific records** [Industry is IT] from the drop-down list.
7. In **Which records should Zia use for learning?**, select the fields and the values to use for the prediction [marital status, family medical history, income etc.].
8. Click **Save**.
9. . In the custom field creation *Attention* popup, click **Yes, Create**.

Quadrant Analysis

In your business if you want to measure or compare a limited set of data, it can be done by using a chart, KPI, etc. But when you have a large amount of data in hand and would like to pinpoint the areas to focus, a Quadrant analysis can help in such situations.

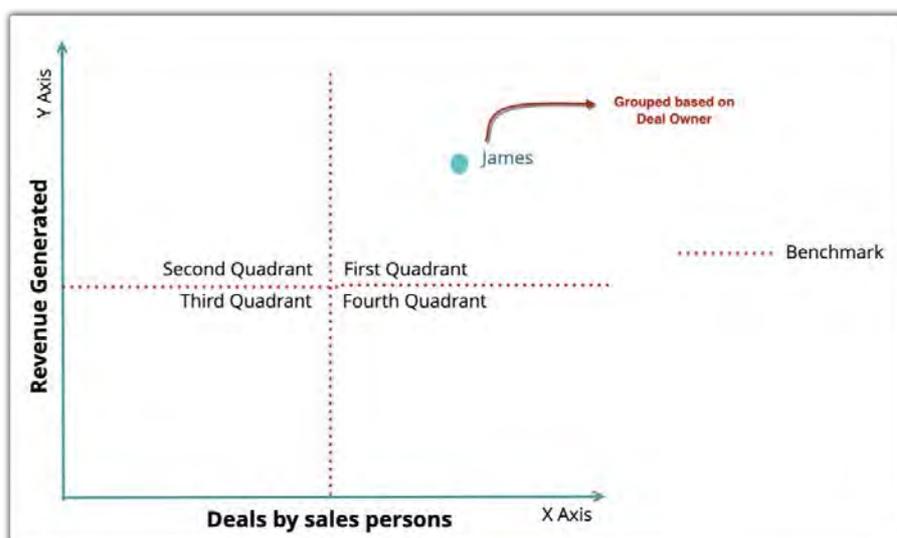
Quadrant analysis scatters the data that you want to analyze/measure into four quadrants. You can analyze data such as the **type of campaigns vs the revenue generated** to identify the campaign that has been more effective or **leads created vs lead source** to identify the source from which you are gathering more leads for the company.

Components of a quadrant analysis

Axis: The parameters are defined in the X and Y-axis, based on which data will be plotted in the graph. X - Axis represents the horizontal line and Y - Axis represents the vertical line. For example, **X-Axis** represents the **Number of Deals** and **Y-Axis** represents the **Revenue Generated**, the data based on these two metrics will be plotted on the appropriate quadrant.

Grouping: Allows you to specify how you want to group the data that is measured in the X and Y-axis. For example, Deal owner, Created date, Deal Stage, etc. So if grouping is based on the Deal Owner, you will be able to see the number of deals created by the deal owner and the revenue generated by them.

Benchmark: The threshold limit for the X and Y-axis can be defined in Benchmark. This splits the axis into four quadrants.



Feature Availability

- Available in the Enterprise and Ultimate Editions
- Limits – 10 and 25 quadrants respectively.

Types of Quadrant Analytics

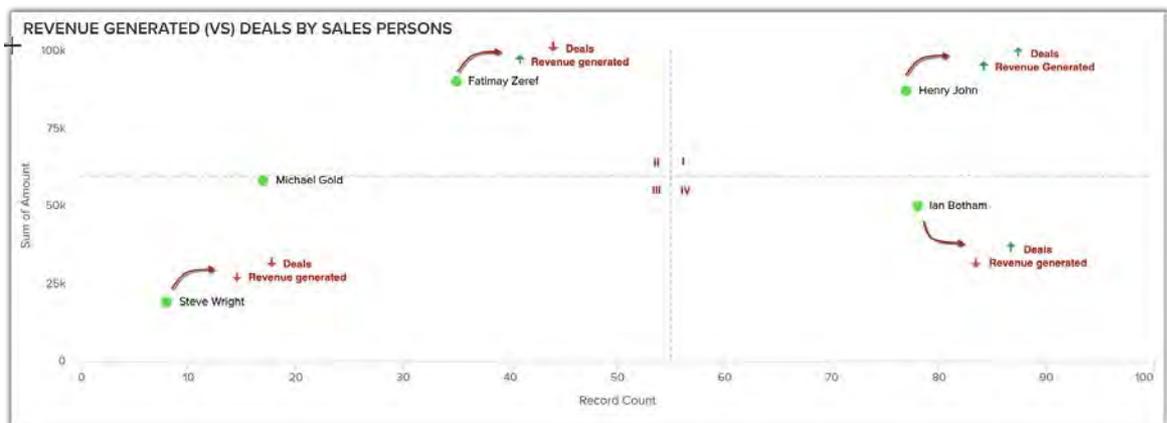
There are two types of quadrant analytics: **Standard** and **Advanced**.

Standard

This analytics allows you to visualize the data based on the following:

- The module you have chosen
- How you want to group the data. i.e. **Date** or **Dimension**
- The metrics you define to visualize the data (X and Y-Axis). Example, X-axis - **Count of deals**, Y-axis - **Sum of Amount**.
- The benchmark

For example, you are creating a quadrant analytics to view the **Deals by sales persons vs Revenue Generated**. Once all the components are defined, the data will be plotted in the appropriate quadrants.



From the above quadrant analytics, you can infer the following:

- **Henry John** has more number of deals and has generated more revenue for the company. He lies in the first quadrant.
- **Fatimay Zeref** has less number of deals and has generated more revenue. She lies in the second quadrant.

- **Steve Wright** has less number of deals and has generated less revenue. He lies in the third quadrant.
- **Ian Bothom** has more number of deals and has generated less revenue. He lies in the fourth quadrant.

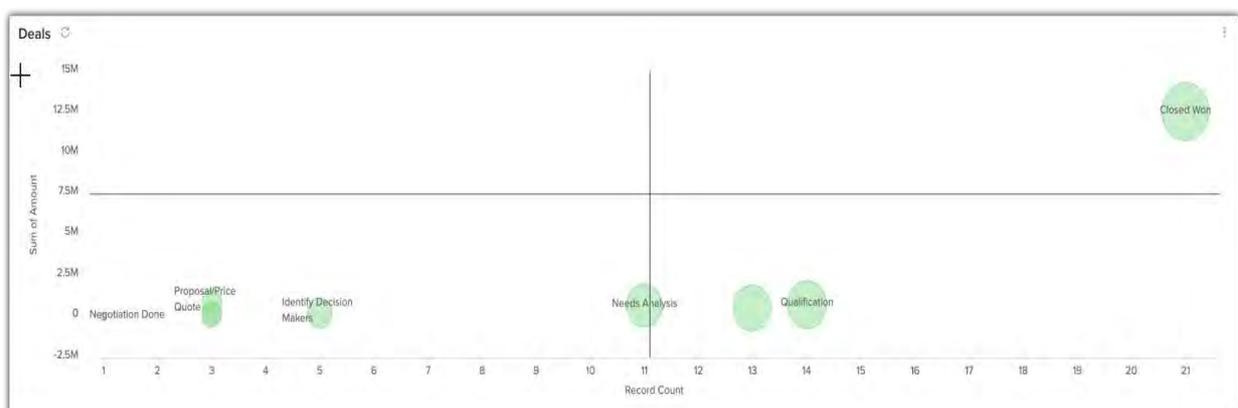
From this, you can infer that the sales rep in quadrant one and two are performing better than the ones in the quadrant three and four.

Advanced

Advanced analytics is an extension of standard analytics by allowing you to define how you want to group the data that you want to visualize in four quadrants. This type of analytics can be used to determine the type of business that generates more revenue for the company, or the deals present in different stages of the sales pipeline, etc. This will be indicated by the different sizes of the plot area. LARGER the value, bigger the plot area will be. In the advanced analytics, you can visualize the data based on:

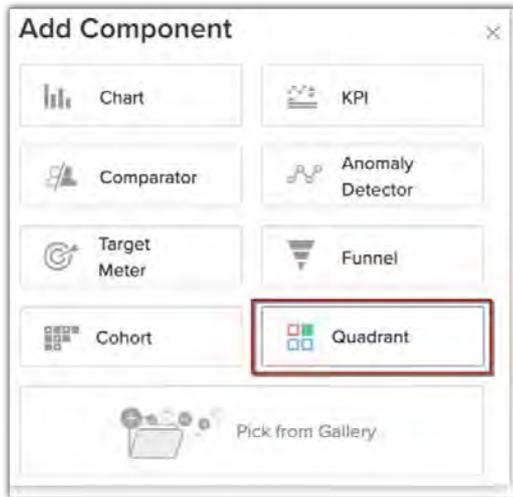
- The module you have chosen
- How you want to group the data. Eg. Based on deal stage.
- How you want to measure the grouped data. Eg. Number of deals.
- The metrics you define to visualize the data (X and Y-Axis). Example, X-axis - Count of deals, Y-axis - Sum of Amount.
- The benchmark.

Say you want to group the data based on Deal stage and measure them based on the number of deals in a particular stage. Once they are defined, you will be able to visualize that, more the number of deals in a particular stage, more the area of the plot will be. This helps you to identify the majority of deals present in a particular stage.



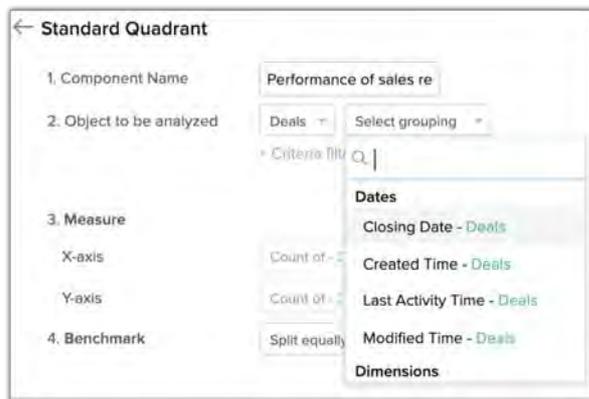
To configure quadrant

1. In the **Analytics** tab, click **Add Component** and choose **Quadrant**.

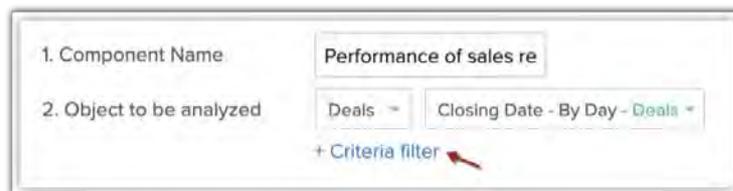


2. In the *Choose Quadrant Style* page, choose either **Standard** or **Advanced**.
3. In the quadrant builder page, do the following:
 - a. Enter the **Component Name**.
 - b. Under object to be analyzed, choose the module and select grouping from the drop-down list.

Grouping can be based on a date or dimension.



- c. Click **+ Criteria Filter** and add the criteria based on which you want the records to be analyzed.



If you choose **Advanced**, you can select how you want to measure the grouped data from the drop-down list.

The screenshot shows a reporting configuration interface. At the top, under '2. Object to be analyzed', there are two dropdown menus: 'Deals' and 'Closing Date - By Day - Deals'. Below this is a '+ Criteria filter' section with a 'Select measure' dropdown. A search bar with a magnifying glass icon is present. A list of measures is displayed, including 'Count of - Deals', 'Sum of Amount - Deals', 'Minimum of Amount - Deals', 'Maximum of Amount - Deals', 'Average of Amount - Deals', and 'Sum of Discount - Deals'. On the left side, there are sections for '3. Measure' (with 'X-axis' and 'Y-axis' labels) and '4. Benchmark'.

- d. Under **Measure**, choose the **X-axis** and **Y-axis** from the drop-down list.
- e. Specify the **Benchmark**. You can either choose **Split equally** or **Define Custom Values** and specify the values for X-axis and Y-axis.

The screenshot shows the '4. Benchmark' section. A dropdown menu is set to 'Define Custom values'. Below it, there are two input fields: 'X-axis' with the value '20' and 'Y-axis' with the value '3000'.

- f. Click **Save**.

Cohort Analysis

Cohorts are a group of users, customers or data that share similar characteristics at any given point of time. Cohort analysis can be beneficial in understanding customer behaviour across the life cycle or their buying trends and patterns or in analyzing the support costs over a period and similar such metrics. Results drawn from the analysis can be used to adjust the existing services or products to the identified cohorts and finally observing the resultant impact on overall health of the business.

Feature Availability

- Available in the Enterprise and Ultimate Editions
- Limits – 10 and 25 cohorts respectively.

Types of Cohort Analysis

Time-based cohort analysis

Time based cohorts are helpful in understanding a pattern or change that happen weekly, monthly, yearly or quarterly. Lets consider some examples:

- **Studying month-wise deal closure pattern** - You can run a cohort analysis to see the deal closure pattern for the past months. The total number of deals that were closed in the first, second, third and fourth month from the month of creation will help understand the month-wise deal closure pattern. The cohort below clearly shows that the deals created in February and March showed maximum deal closure in the first and second months from creation and also that there was a considerable dip in the closure

after the second month.

Creation Date	Record Count	Closing Date from Creation Date in month(s)			
		1	2	3	4
January 2019	150	60	40	15	10
February 2019	270	58	43	42	35
March 2019	115	78	20	10	4
April 2019	124	20	19	15	10

- Day-wise product purchase frequency** - In retail business, it will be helpful to get a quick insight on how often a particular product is purchased by the customers. You can run a cohort for the product category with a timeline from sale start to sale end date (purchase end date) and see the number of times a product was bought from 1st day till the 5th day of a sale period. The below data shows a considerable increase in the purchase by the third day. The data also indicates that customers have made more purchases in the electronics category in comparison to other categories.

Product Category	Total Purchase	Sales End Date from Sales Start Date in day(s)				
		1	2	3	4	5
Men's Fashion	3000	300	350	400	570	500
Women's Fashion	5000	250	45	350	455	200
TV and Appliances	4000	200	110	90	86	112
Books and Kindle	3500	450	350	460	500	490
Electronics	5000	1200	1000	1500	2000	1800

Segment-based cohort analysis

Customers can be segmented on various parameters such as the type of product purchased, subscription opted for, type of service chosen. From a sales perspective you can group your leads based on their source or origin, geographic location or type of occupation. Some organizations find it useful to group their customers based on the business size like startup,

medium-sized, or enterprise-level and also the industry type to understand their buying frequency and product preferences.

Analysis on a segment helps in getting deeper insights about a group's interest, pattern, and behavior, allowing you to pitch a more personalized marketing campaign. It also lets you draw specific inferences that can be used to optimize existing processes for better results. Consider these examples.

- Buying pattern after sale** - Consider this, you analyzed the buying pattern six months after an "end of season" sale and noticed that most of the customers who purchased during that time had continued to purchase every consecutive month. You must consider them as loyal buyers and focus more on retaining and engaging them by sending personalized campaigns like early bird offers, exclusive discounts, and festival coupons.

Product Category	Record Count	Sales End Date from Sales Start Date in month(s)						Total Unit ...
		1	2	3	4	5	6	
Men's Fashion	300	30	35	22	12	24	13	\$645.00
Women's Fashion	655	450	237	340	250	300	350	\$929.00
TV and Appliances	400	40	50	55	60	45	10	\$14,100.00
Books and Kindle	600	46	54	60	35	25	15	\$610.00
Total	1955	566	376	477	357	394	388	\$20,742.00

- Business size-wise purchase pattern** - Let's consider another case where the marketing strategies can be tweaked as per the product's purchase frequency. A cohort analysis on different business sizes versus their purchase frequency can help you understand if a certain product interests a type of business or not and then, market the products based on the audience's interest and requirement.

Business size	Total Purchase	Sale started from Purchase end in month(s)			
		1	2	3	4
Small sized	20	4	4	3	2
Medium sized	500	150	150	200	350
Enterprise level	1000	400	450	500	600
B2B	30	3	6	7	0
Others	45	10	5	10	4

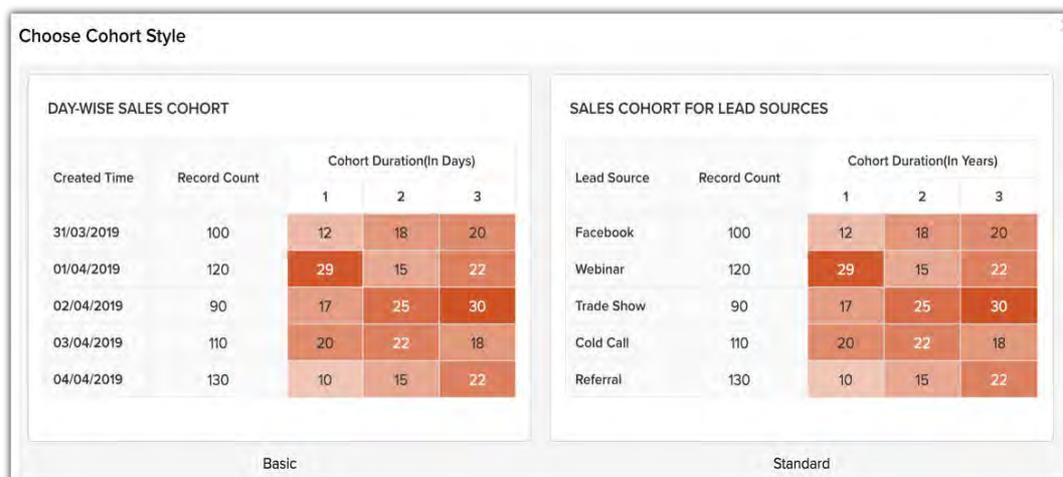
This analysis shows that a particular product has not been purchased much by the small-sized, B2B, and other orgs. Whereas, right from the first month there has been consistent increase in the purchase rate in medium and enterprise level orgs. So, you can conclude that the latter group is more interested in the product than the former cohort group. Therefore, instead of targeting all the organizations, your marketing efforts must be inclined towards these two groups that have shown the maximum interest. You may review the least purchased group for any issues with the product or service offered and find ways to market them better.

Configuring Cohort in Zoho CRM

You can create three types of cohorts:

Basic - A basic cohort lets you make date-wise analysis. For example, you can choose created, modified, last activity or any other custom date/time field.

Standard - A standard cohort lets you run an analysis using dimensions or pick-list field. You can use standard or custom picklist fields such as industry type, product category, lead source, lead status, and record owner.



Advanced - Is a combination of basic and standard cohort. You can analyze using either of the two parameters: dates or dimensions. Also, you can add additional metrics such as the sum of annual revenue, total number of leads, sum of purchases, and average unit price. Any number

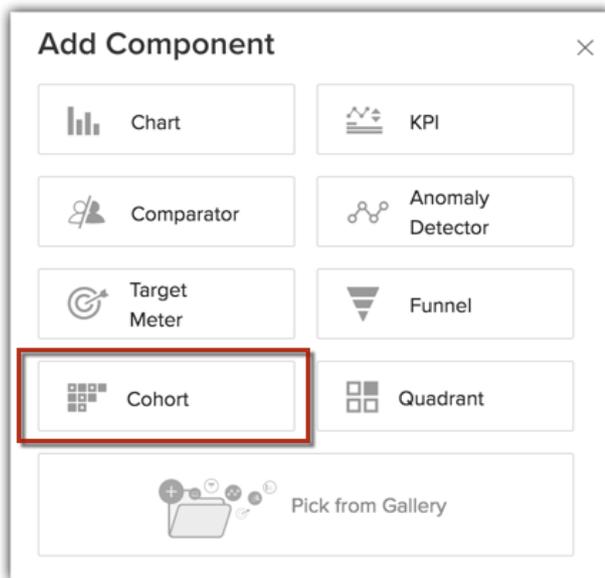
field can be used for additional metrics.

SALES COHORT FOR LEAD SOURCES					
Lead Source	Record Count	Cohort Duration(In Weeks)			Sum of Amount
		1	2	3	
Facebook	500	200	100	100	\$20,000.00
Referral	570	100	210	190	\$35,637.00
Webinar	230	70	100	30	\$149,300.00
Trade Show	840	190	270	300	\$230,600.00
Cold Call	970	500	270	130	\$520,350.00
Advertisement	860	190	270	300	\$260,000.00
Total	3970	1250	1220	1050	\$1,525,887.00

Advanced

To configure cohort

1. In the Analytics tab, click **Add Component** and select **Cohort**.



2. In *Choose Cohort Style*, select the desired cohort type from basic, standard and advanced cohorts.
3. In the *Cohort builder* page, enter the following details:
 - a. **Component Name** - Enter the component name, such as purchase frequency after end-of-season sale or sales cohort for lead sources.
 - b. **Cohort Analysis For** - Select a module and grouping from the drop-down list.
Note - Grouping can be either by date or dimension.

- c. **Cohort Data** - In both the places select the number fields for which you want to run the cohort. For example record count, total purchases, product count etc. versus the count of records.
- d. **Criteria Filter** - Mention a criteria if you want only specific records to be considered.
- e. **Duration from** - Select the duration of your analysis, like sales start to end date, purchase start to end date, created time to modified time.

Note - Only the Date and date/time based fields will be listed here.

1. Component Name: Business size-wise distril

2. Cohort Analysis for: Accounts | Industry - Accounts

3. Cohort Data: Count of - Accounts
+ Criteria filter
vs
Count of - Accounts
+ Criteria filter

4. Duration from: Sales started Time to Purchase End Time
Duplicate Groupings are not allowed

5. Duration Interval: By Month

6. Duration Range: 1 - 10 (In Months)

- f. **Duration interval** - Choose day, week, month, quarter or year.

5. Duration Interval: By Month

- By Day
- By Week
- By Month
- By Quarter
- By Year

- g. **Duration Range** - Select the range for which you want the results, such as 1-4 or 7-14.

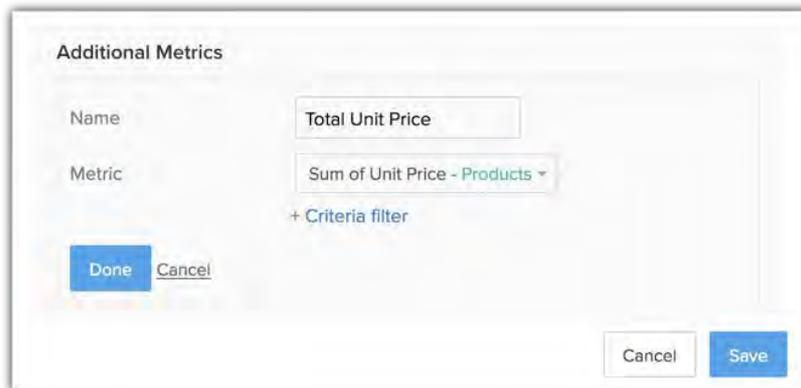
The maximum duration range can be up to 10 (1-10, 15-25 etc.).

5. Duration Interval: By Month

6. Duration Range: 1 - 6 (In Months)

- h. **Additional Metric** - Click **Add Metrics**, to add more values from any number field into the cohort.

You can define the criteria to consider only specific records.



- 4. Click **Done**, to save the additional metrics.
- 5. Click **Add & Reorder** to change the configurations.
- 6. Click **Save**.

Webform A/B Testing

Webforms are interactive HTML forms published on web pages that require a person to fill in the details and submit. Like any other Webform, the ones created in Zoho CRM can be embedded on your web page for various purposes. For example, to gather feedback, place product orders, raise service request, etc. This information submitted through the form is captured automatically in your Zoho CRM account.

Let us say, you have a lead generation form on your landing page that is not giving you as many leads as expected. You may want to look into the reason for this as the form is the gateway between your website and visitors. There are many best practices to increase the performance of Webforms. Among others, something simple as reducing the number of fields and changing the colour and text of your CTA button can boost up the rate of form submissions. But how can you try out these experiments on CRM's Webform and identify the best performing one without losing time and traffic to your form. A/B testing can help you with that.

A/B testing is basically an experiment where two or more variations of a Webform is shown to different segments of the website visitors simultaneously. By comparing the performance of the variants the winning form is identified and used to get the best results. So, instead of making changes to your lead generation form based on assumptions, the A/B Testing feature for Webforms in Zoho CRM can help you take an informed decision and select the form that gives better results.

The process of A/B Testing Webforms in Zoho CRM

The process of A/B Testing can be categorized into three:

Start A/B Testing

This involves selecting the Webform for which you want to execute the A/B testing and create variants. Once the variants are created, you can set up A/B testing by specifying the target audience along with the duration for running this experiment.

View A/B Testing Results

Once A/B Testing is started, you can view the status and the statistics on the performance of the original form and the variants.

Launch the winner

After you run this test for a period of time, the winner will be declared based on the conversion rate i.e. the percentage of visitors who submitted the form. You can launch the winner, which means the form that performed well will be replaced with the original form on the web page.

Feature Availability

Available in Enterprise and Ultimate editions.

- **Limits in Enterprise:** 2 A/B Testing per module and one A/B Testing per Webform.
- **Limits in Ultimate:** 10 A/B Testing per module and 3 A/B Testing per Webform.

Terminologies in this feature

- **Original Form** - A Webform for which you want to carry out the A/B testing.
- **Variant** - The version(s) of an original Webform.
- **Visitors** - Number of people who have visited the web page that hosts the Webform.
- **Unique Submissions** - The first form submission made by a visitor. Multiple submissions can be made but only one submission per visitor will be considered as an unique submission.
- **Conversion Rate** - The percentage of visitors who submitted the Webform.
- **Abandon Rate** - The percentage of visitors who started filling the form, but failed to submit it.
- **Complete Submission** - Number of visitors who filled all the fields in the Webform and submitted it.
- **Partial submission** - Number of visitors who did not fill all the fields in the Webform before submission.
- **Improvement Rate** - The percentage rise in the number of submissions received from the variants with respect to the original form.
- **Leading** - During A/B testing the variant or the original Webform with maximum conversion rate will be marked as leading.
- **Winner** - At the end of the testing period, the original form or the variants which has a better conversion rate will be adjudged the winner.

Start A/B Testing

Create Variants of the original Webform

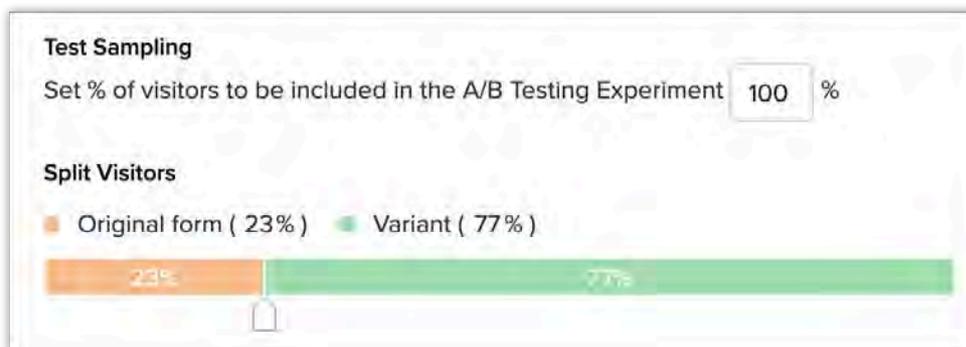
You can create different versions of the original Webform by including more fields, modifying the field properties, changing the Call To Action buttons, changing fonts, revising the background colour of the form and so on. All the changes that you make in the variant can be viewed from the **Changes List**. You can also revert the changes, if necessary.

A/B Testing Configuration

Setting up A/B Testing involves defining the percentage of visitors that should be roped in for the A/B testing. Further, the percentage of visitors who should view the original Webform and the variants should also be specified. The date and time or the number of visitors after which the A/B Testing should end determines the duration of your A/B Testing. You can also save the A/B Testing configuration as draft.

Test Sampling: Specify the percentage of visitors that should participate in the A/B testing.

Split Visitors: Specify the percentage of visitors who should view the original form and the variants. For example, 77% of the visitors will view the variant while the remaining 23% will view the original form.



The screenshot displays the A/B Testing Configuration interface. Under the 'Test Sampling' section, there is a text input field labeled 'Set % of visitors to be included in the A/B Testing Experiment' with the value '100' and a '%' symbol. Below this, the 'Split Visitors' section features a legend with two items: 'Original form (23%)' represented by an orange square and 'Variant (77%)' represented by a green square. A horizontal bar chart below the legend shows a green bar for 77% and an orange bar for 23%, with a small white icon at the bottom center of the bar.

Test Ends: Specify the duration of the A/B Testing. The maximum duration can be three months. The duration can be specified in the following ways:

- End after a specific day, week, or month
- Mention the from and to dates

- End after a the visitor limit is reached. For example, after 350 visitors have viewed the Webform, A/B Testing can be completed.

Status of A/B Testing

Once the A/B Testing has been started, the status of the A/B Testing can be categorized based on the following:

- **Running** - Determines an ongoing A/B Testing process.
- **Scheduled** - When the A/B Testing is scheduled to take place at a later time.
- **Completed** - Once the A/B Testing is completed.
- **Paused** - When the ongoing A/B Testing is kept on hold temporarily.
- **Launched** - When the **Winner** is launched replacing the original Webform.

Note: If you have the original form along with two variants say, Variant 1 and Variant 2. Variant 1 has been adjudged the winner with a slightly higher conversion rate than Variant 2. In such cases, you may want to still proceed with Variant 2 over Variant 1 for various reasons. So, even if the Winner is declared, you can go ahead and launch the variant of your choice.

- **Drafted** - A preliminary version of the A/B Testing that you have configured before executing it.

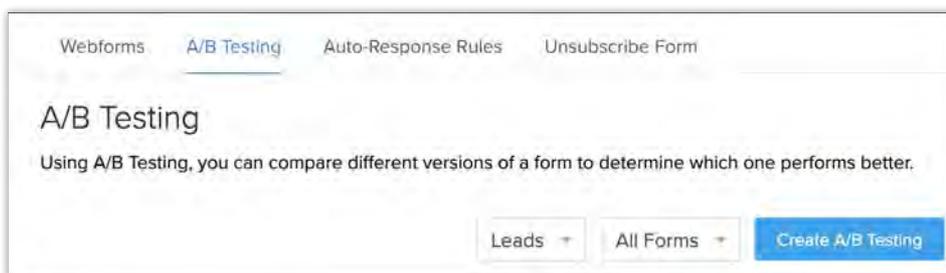
Note

- At any given time, only one A/B Testing for a Webform can be in the Running state.

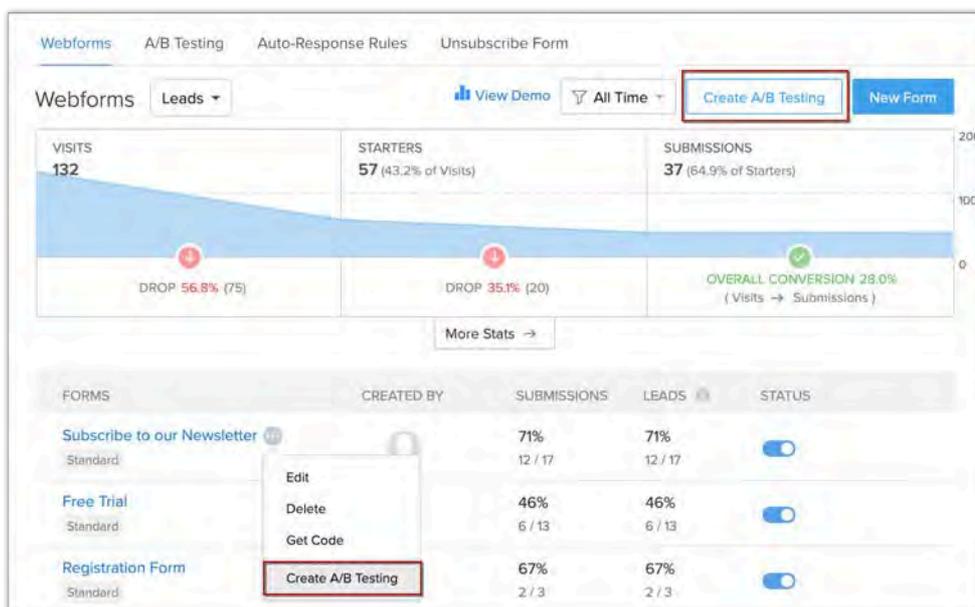
Setting up A/B Testing

To set up A/B Testing

1. Go to Setup > Developer Space > Webforms > A/B Testing.
2. In the *A/B Testing* page, click **Create A/B Testing**.



Alternatively, you can create A/B Testing by clicking **Create A/B Testing** button from the Webforms page or by moving your mouse pointer to a desired Webform under the *Webforms* tab and click **More > Create A/B Testing**.



3. In the *Create A/B Testing* page, enter the following:
 - a. **A/B testing Name** - Specify a name that can be used to refer to this experiment.
 - b. **Form name** - From the drop-down list, choose the Webform which you want to test.
4. Click **Create**.

You will be redirected to the WYSIWYG editor, where you will create a variant of the

original form.

5. Customize the variant as required. You can do the following:

- a. In the *Variant* Tab click **More > Clone/Delete** to clone or delete a variant.

- b. Click the Add icon (+) to add a new variant.
- c. Click **View changes** to view the list of changes made to the variant with respect to the original form.
- d. Hover over the filed in the *Changes List* page and click **Revert** to undo the change.

- e. Click **Preview** to view how the variant looks.

6. Click **Next**.

7. In the *A/B Testing Configuration* pop up, do the following:

- a. Enter the percentage of visitors to be included in the A/B Testing experiment in the **Test Sampling** field.
- b. Split the original form and the variants among the visitors by dragging the handler to the left or right.
- c. Specify when the test should end.
- d. Select the checkbox to notify the winner of the A/B Testing through email.

- e. Click Start A/B Testing.
- f. Click **Save as Draft** to save the A/B Testing configuration as draft.

A/B Testing Configuration

Test Sampling
Set % of visitors to be included in the A/B Testing Experiment %

Split Visitors
 Original form (50%) Variant (50%)

Test Ends
 After Days
 Specific date range
 After -visitors

Notify me the A/B testing winner through email

NOTE:

- Once the test ends, original form will be served in all its locations.
- Webform with the highest conversion rate will be considered as the winner of A/B Testing.

Buttons: Cancel, Save as Draft, Start A/B testing

Note

- A/B Testing works only for webforms that are hosted in Embed/iFrame format.
- You can schedule the A/B testing for a later date.
- Once A/B Testing has been started, the configurations or the variants cannot be edited.
- Once the A/B Testing is done, only the original form will be available for all the visitors until the winner is launched.

View A/B Testing Results

You can view the A/B testing result by hovering over the A/B Testing name and clicking the **View Results** option. There are two tabs namely, Preview and Analytics.

A/B TESTING NAME	VARIANTS	CREATED BY	TEST CONDITION	STATUS	WINNER
Feedback Form - Testing	1		79 day(s) 9 day(s) remaining	Running	View Results

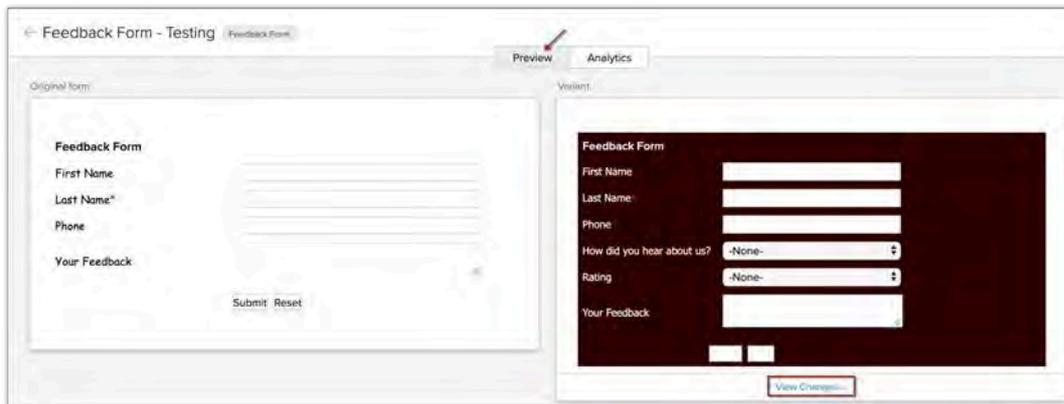
Note

- After completion of A/B testing it will take ten minutes to declare the winner.

- The Analytics will not be dynamically updated. You need to refresh the page to view the updated results.

Preview Tab

This displays the original form along with the variants that you have created. You can preview the form variants in full screen by clicking  - the Expanded View icon. Further, the changes made in the variants with respect to the original form can be seen here.



Analytics Tab

The Analytics tab displays the following:

A/B Testing Details

This section displays details such as:

- The duration (Days/Visitors) of A/B Testing.
- Number of days, weeks, months or visitors after which the A/B Testing will complete.
- The user who started the A/B Testing.
- The status of A/B Testing.



A/B Testing Stats

This section displays the following details:

- Experiments - which lists the Original Form and the Variants.

- Unique Submissions by Visitors.
- The **conversion rate** and **improvement** in the conversion rate by comparing the Variant with the Original form.
- **Percentage of visitors** allotted to the original form and the variants.

A/B Testing stats 12620 visitors have been participated from Jul 1, 2018 - Aug 9, 2019

EXPERIMENTS	UNIQUE SUBMISSIONS / VISITORS	CONVERSION RATE	IMPROVEMENT	% OF VISITORS
Original form	2320 / 4760	48%	Baseline	34%
Variant 1 Winner	1930 / 3040	63%	31% ↑	33% Launch
Variant 2	638 / 4820	13%	72% ↓	33%

- **The Leading form** - During the A/B Testing process, the Variant or the Original form that has the maximum conversion will be marked as **Leading**.
- **The Winner form** - Once the test is completed, the original Webform or the variant that has the maximum conversion rate will be declared the **Winner**.

Points to remember

- In the event of the conversion rate being the same for all the variants, the winner will be decided based on the following criteria in order:
 - Minimum abandon rate
 - Highest complete submission rate
 - Original Form
- If the conversion rate is 0 for all the Webforms, the winner will not be declared and the notification email will not be sent to the user who started the A/B Testing.
- If the conversion rate is 0 for the original form, the improvement value for the variants will not be defined.

A/B Testing stats 1 visitors have been participated from Jul 18, 2019 - Jul 27, 2019

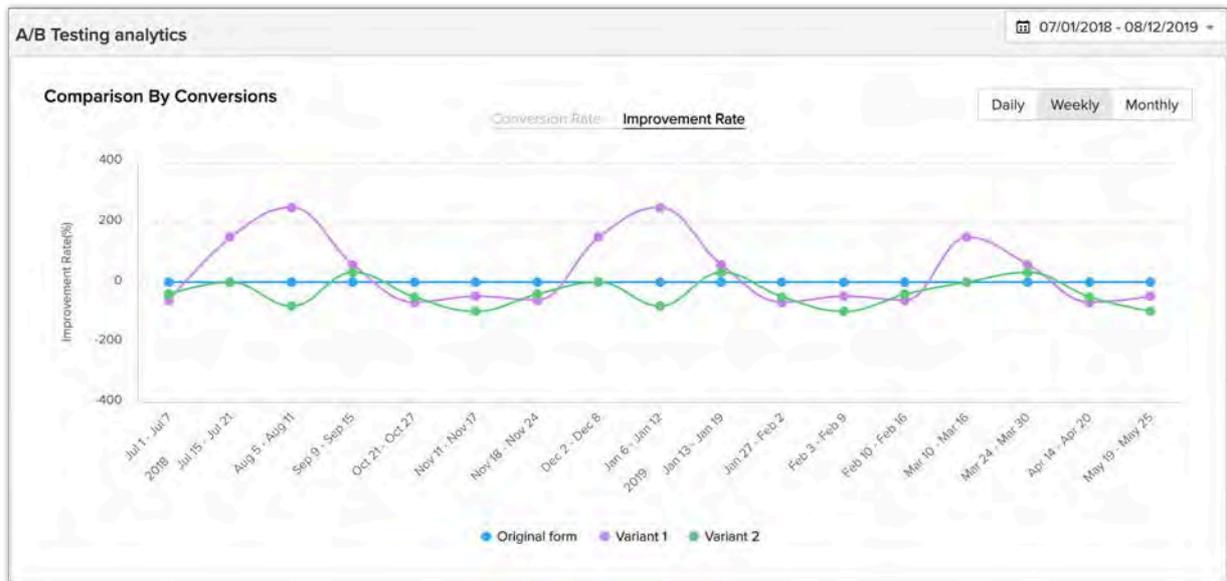
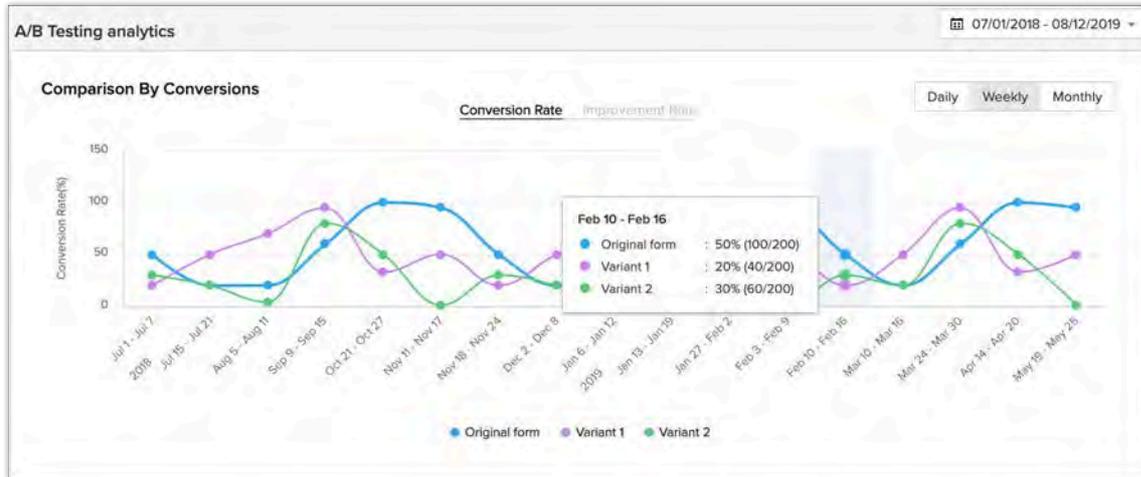
EXPERIMENTS	UNIQUE SUBMISSIONS / VISITORS	CONVERSION RATE	IMPROVEMENT	% OF VISITORS
Original form	0 / 0	0%	Baseline	10%
Variant 1	0 / 0	0%	Undefined	17%
Variant 2	1 / 1	100%	Undefined	73% Launch

A/B Testing Analytics

The graphical representation displays comparisons between the original form and the variants. You can view the comparison for:

The rate of conversion

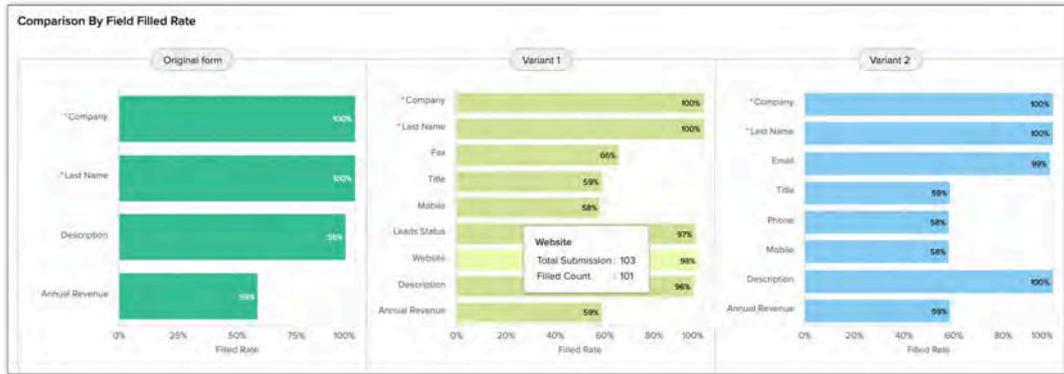
This graph displays the comparison of the conversion rate and the improvement rate between the Original form and the variants.



The fields filled in the Webform

This graph displays the rate at which the fields in the Original Webform and the Variants are

filled.



Pause A/B Testing

If you temporarily pause the A/B Testing, the original Webform will be served to all the visitors and the variants will not be shown. Once resumed, the A/B Testing process will continue to function.

To pause A/B Testing

- Go to Setup > Developer Space > Webforms > A/B Testing.
- In the list view under the *Status* column, click **Pause**.

A/B TESTING NAME	VARIANTS	CREATED BY	TEST CONDITION	STATUS	WINNER
Feedback Form - Testing Feedback Form	1		79 day(s) 9 day(s) remaining	Running Pause	View Results

Alternatively, you can open the A/B Testing and hit the **Pause** button next to the **Status** in the *A/B Testing Details* section.

A/B Testing Details				Test Sampling: 100%
TEST CONDITION 79 day(s)	REMAINING 9 day(s)	STARTED BY Patrick Jane	STATUS Running	Pause

You

can also filter the list based on Status using the filter button ().

- Click **Resume** to continue the testing.

Feedback Form - Testing Feedback Form	1		79 day(s) 9 day(s) remaining	Paused Resume	View Results
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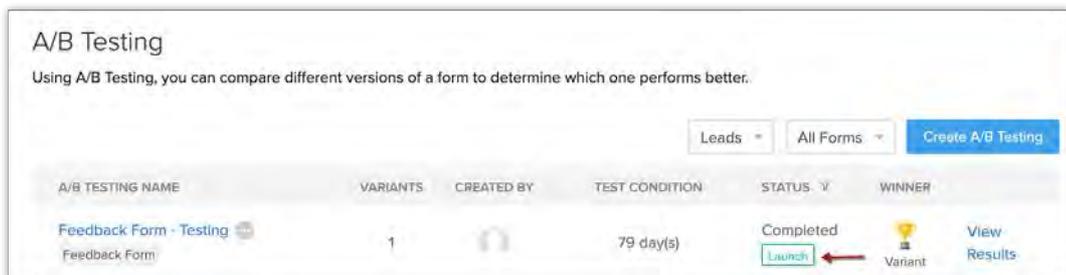
Launch a Webform

Once the A/B Testing is done and the winner is declared, you can launch the winning Webform which means the original Webform will be replaced in the web page with the winner form. Since the winner is adjudged based on the Maximum Conversion rate, it is ideal to launch the **Winner**. You can also launch the original Webform or the variant if required.

To launch a webform

1. Go to Setup > Developer Space > Webforms > A/B Testing.
2. In the list view under the Status column, click **Launch**.

The Winner will only be launched by clicking this launch button. Alternatively, you can open the A/B Testing, move your mouse pointer over the experiments in the A/B Testing Stats section and click **Launch**.



Webform Analytics

Webforms are the most common tool used by organizations for lead generation. As the lead submits the form their information is captured in CRM from where the reps take it up for the further follow-ups and nurturing processes. Most of the times, organizations host multiple webpages that help them focus on a wider audience and generate more leads. It is also important to analyze the performance of each webform to understand if they are serving the desired purpose. There are several parameters that can help you determine the performance:

- Number of visits to the webforms
- Number of submissions
- Percentage of fields that are usually filled in the form
- Whether the leads have any deals associated with them

Benefits of Webform Analytics

Webform analytics help you analyze the performance of the webforms by identifying how well the visitors interact with your webforms and what causes them to drop off. Let's take an example.

Zylker Inc is a technology company that offers product training to its customers from all regions. They host a webform in the company's website, that captures information about the interested customers.

They notice a dip in the number of forms submitted from few regions and decide to analyze the performance of the forms for each region and observed the following:

- Fields such as Date of birth, correspondence address, Fax, website, and company name were not filled by most of them.
- Majority of the forms were submitted from Austria, France, Spain, and Sweden.
- Least number of submissions were from Canada, Norway, and Brazil.

These vital statistics can help them to improve the form and increase its efficiency.

Feature Availability

Available in the **Enterprise** and **Ultimate Editions**

Limits in Enterprise: 1,00,000 visits per month with three months of data for analysis.

Limits in Ultimate: 3,00,000 visits per month with six months of data for analysis.

Key terms in webform analytics

Visits: The number of times the website that has the webform is viewed. Every website refresh will be considered as individual visits.

Unique Visitors: The number of visitors who viewed the website that has the webform. However, the website refresh will not be taken into consideration.

Starters: The first interaction with the fields in the webform.

Submissions: Number of visitors who submitted the form.

This can be further classified into Partial and Complete submission.

- **Partial submission:** If fields in the webform are skipped, yet submitted.
- **Complete Submission:** If all the fields in the webform are filled and submitted.

Conversion Rate: It is the percentage of submissions from the total number of visits.

View Overall Form Analytics

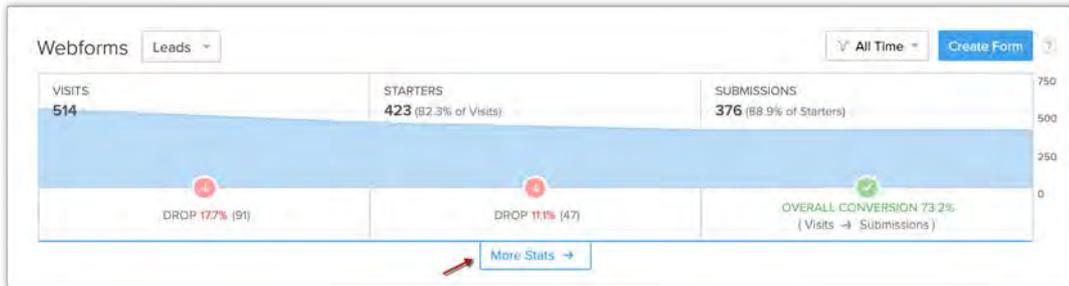
The overall analytics of your webform can be viewed from the webforms page.

Note: Webform Analysis can be viewed for **Leads, Contacts, Cases,** and **Custom Modules.**

To view the overall form analytics

1. Go to Setup > Developer Space > Webforms.

2. Click **More Stats**.



Overall form analytics

The overall analytics provides complete information on the performance of webforms by offering various statistics. This allows you to understand the form behaviour and compare the webforms in a module to identify the most successful one. The analytics are classified in the following sections.

Submission based on Forms

This analytics gives you an insight based on the submissions received for the webforms. You can see the number of Leads submissions received across all the webforms created for a module.



From this section, you can gather the following:

- **Total Submissions** - Displays the total number of submissions made using the webforms.
- **Max Conversion Rate** - Displays the webform that has the maximum conversion rate.
- **Max Drop Rate** - Displays the webform that has the maximum drop in conversion. Further this section displays a graphical representation of number of **Visits**, **Starters**, and **Submissions** for the webforms that are displayed.
- Hovering over the graphical representation, displays the number of visits, unique visitors, starters, submissions, and the conversion rate for webform.

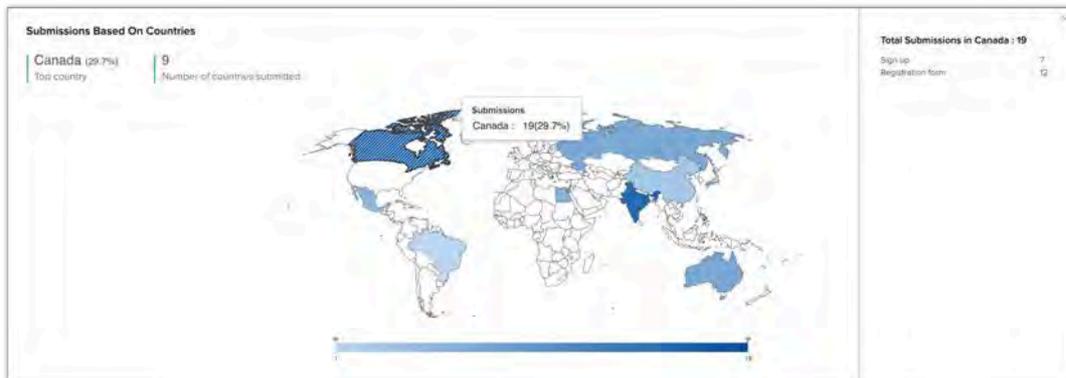


You can also view the metrics in a tabular view.

FORM NAME	VISITS	UNIQUE VISITORS	STARTERS	SUBMISSIONS	CONVERSION RATE
Contact Us	1177	810	360	95	8.1%
Subscribe to our Newsletter	1751	1220	720	190	10.9%
Free Trial	2327	1630	1080	285	12.2%
Registration Form	2901	2040	1440	380	13.1%
Sign Up	3478	2450	1800	475	13.7%
Registration Form	5225	3670	2520	665	12.7%

Submission based on Countries

Submissions from your webform are categorized based on the country from where the submissions are made. This analytics allows you to view the total number of submissions made from a particular country by clicking on them.



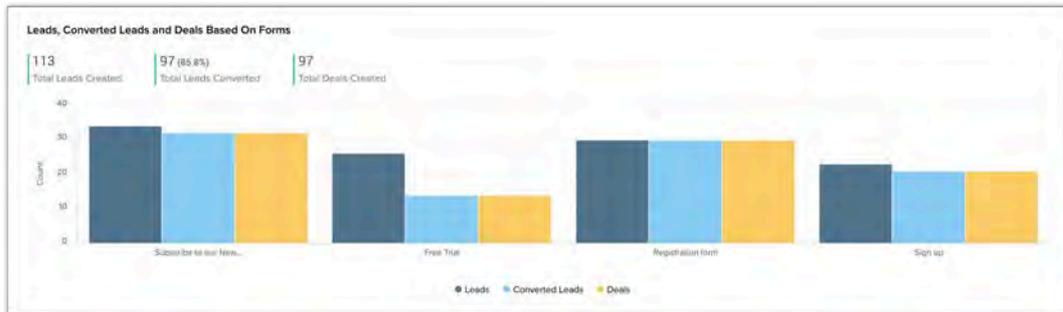
Additionally, the following metrics are captured:

- **Top Country** - Displays the country with a maximum percentage of submissions.
- **Number of Countries submitted:** Displays the total number of countries from where the webform submissions originated.

You can also view the metrics in a tabular view.

Leads, Converted Leads, and Deals based on forms

The transition that takes place for records generated from the webforms can be obtained from this section. You can see the number of leads created and out of which the number of leads that are converted and the deals associated with them.



You can also see the following metrics:

- **Total leads created:** Total number of leads created, taking into account the submissions made from all the webforms in the leads module.
- **Total leads converted:** Total number of leads that are converted and the rate of conversion is displayed
- **Total deals created:** Total number of deals created for the records submitted through the webform.
- Hovering over the graph displays the metrics that are specific for the webform such as: Total leads created and their status.



Note

- This analytics is available only for the **Leads** module.

Revenue based on forms

The revenue generated from closed won deals associated with records generated from the webform are captured in this section.



The following metrics are displayed:

- **Current Revenue:** Revenue generated from closed deals related to the records submitted from the webform.
- **Previous Revenue:** The revenue generated by closed deals previous to the duration specified.
For example, if the webform analytics is filtered based on **Current Month**, then the revenue generated in the previous month will be captured.
- **Growth Rate:** The increase in revenue from the previous revenue generated to the current revenue.

Note

- Previous Revenue and Growth rate will be available only if a time based filter is specified.

View analytics for Individual Webforms

Here the analytics of individual webforms in a module can be obtained by clicking the **View Analytics** button next to the webform.

FORMS	CREATED BY	SUBMISSIONS	LEADS	STATUS
Sign up Showered		34% 25 / 74	31% 23 / 74	<input checked="" type="checkbox"/> View Analytics

This comprises of three sections:

- Based on submissions
- Based on region
- Based on the module

Analysis based on submissions

Information related webform submissions will be displayed in this tab.

Form Submissions

This displays the number of form submissions received in a particular day. The data can be filtered from Daily, Weekly, or Monthly.

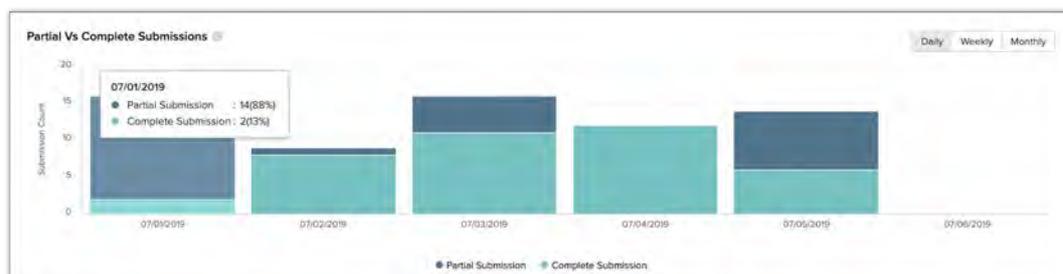


Certain key metrics related to form submissions are captured as follows:

- Total Submissions:** The number of submissions received for the webform will be displayed.
- Average Submissions:** The average number of submissions received for that particular webform.
- Maximum Conversion:** The date in which the webform achieved maximum conversion rate. It is the percentage of number of visitors who visited the webform and also submitted it.
- Maximum Dropout:** The date in which the webform received minimum conversion. It is the percentage of the number of visitors who visited your webform but failed to submit it.

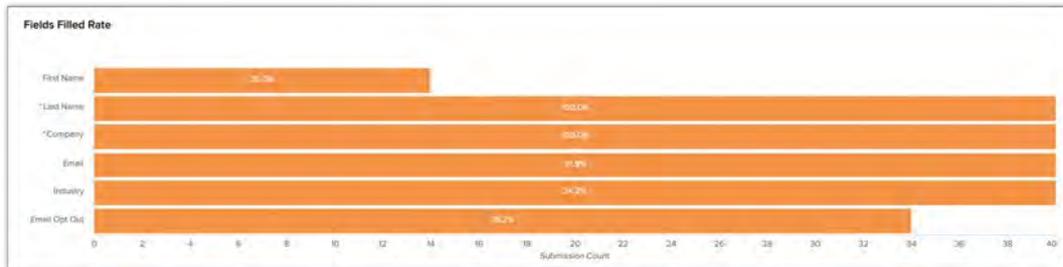
Partial vs Complete Submission

Allows you to trace how the submission are made in your webform. Whether all the fields are filled or if anything is missed.



Fields filled rate

At times, the visitors skip certain fields in the webform. This analysis gives you an idea about the fields that are constantly filled in your webform and the ones that are not. If the fields in a webform are found to be skipped, you can replace those fields to yield better results.



Note

- This statistics is available only for the Ultimate edition.

Submission based on Region

The submissions for your webform is classified based on countries and are displayed in this section.



This section also displays:

- Top Country:** Displays the country with a maximum percentage of submissions.
- Number of Countries submitted:** Displays the total number of countries from where your webforms are submitted.

Submission based on Module

Analytics in this section displays the submissions in a selected module. For example, Leads module, you can see the following:

- **Leads Created** : The total number of qualified leads captured from the webform will be displayed. Qualified leads are the records which has entered the leads module in your CRM account.

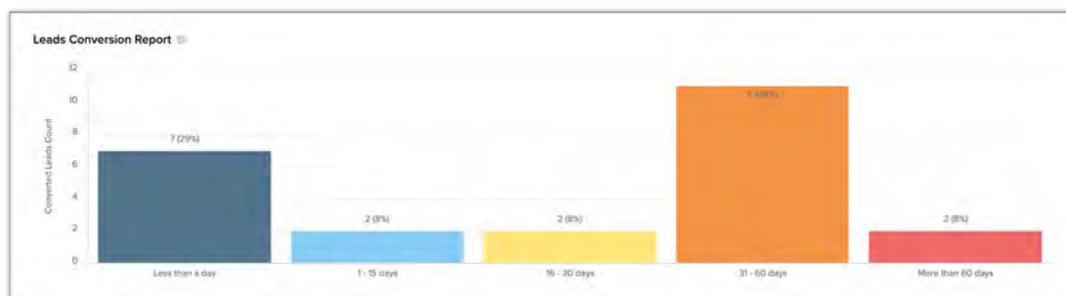


This analytics also displays:

- **Submissions:** Total number of submissions made in a webform irrespective of duplicates, unvalidated records.
- **Duplicates:** If the newly submitted record is already present in your CRM, then it will be classified as duplicates.
- **Validation failed:** If the submission doesn't satisfy the validation rules specified.
- **Waiting for approval:** If the records submitted are waiting to be approved by a user.
- **Double opt-in:** When submissions are received in a webform which has double opt-in enabled and they aren't confirmed yet, they will be captured here
- **Leads:** Total number of leads that are added which doesn't include duplicates, failed validation, waiting for approval and waiting for double opt-in entries.
- **Converted leads:** Total number of leads that are converted.

Leads Conversion report

This displays the number of days taken for a lead to be converted into a contact.



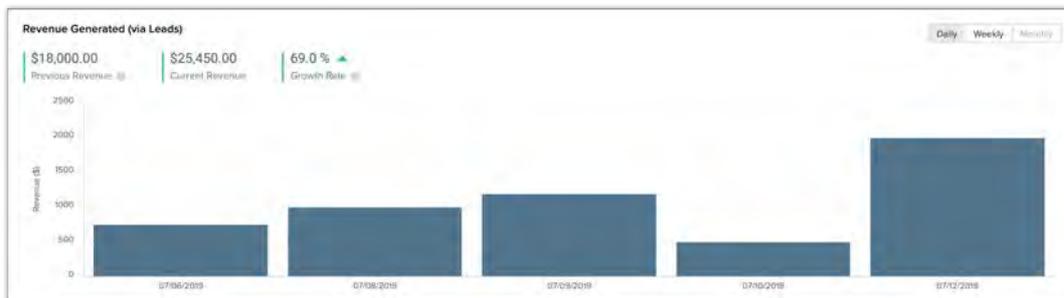
Deals Created (via leads)

Displays the number of deals created in a day for the lead that is captured using this webform. You can view the total and average number of deals created, along with the total and average number of deals closed.



Revenue Generated (via Leads)

The revenue generated from closed won deals associated with a record generated from the webform are captured in this section. You can also see the previous revenue, current revenue and the Growth.



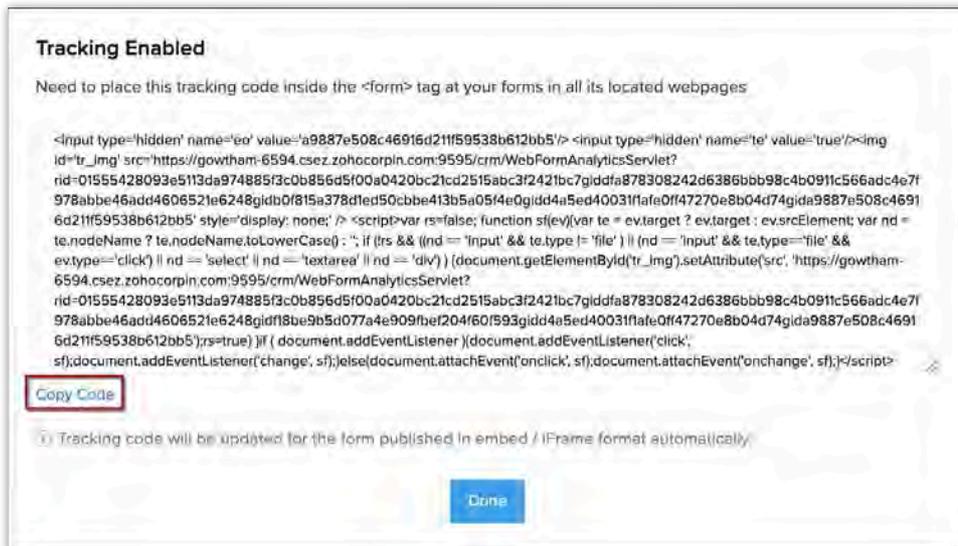
Enable Tracking for webforms

The webform analytics should be enabled manually for all the existing webforms. If the embed/iframe code of the webform is embedded in your webpage, then you can simply click **Enable Tracking** to start analyzing the webform. Only when the source code of the webform is used to embed, the following steps should be executed:

To enable tracking for webforms embedded using source code

1. Hover over the webform and click **Enable Tracking**.

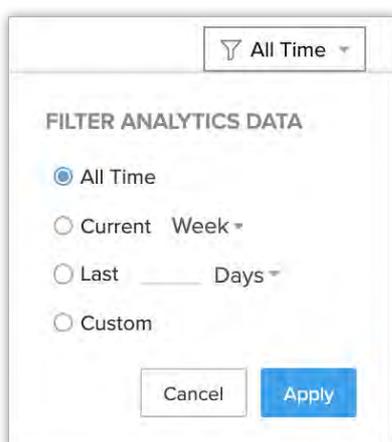
A popup displays the tracking code.



2. Copy the code.
3. Paste the code inside the <form> tag in the webpage where you have embedded the source code of the webform.
Webforms published using iFrame or Embed code will be updated automatically.
4. Click **Done**.

Filter Analytics Data

The duration for which you want the overall form analysis to be displayed can be specified using the filter.



You can filter the analytics data based on the following:

- **All time:** Analytics for all your webforms till the current date will be shown

- **Current Week/Month/Year:** Displays the webform analytics only for the current week/month/year
- **Last [x] days/weeks/months/years:** Specify the number of days/weeks/months for which the webform analytics will be displayed. For example, if the filter is set as 'Last 10 days' analytics will be provided for the last 10 days, excluding the current day.
- **Custom:** Specify the custom dates for which you would like to view the analytics.

Zoho CRM Analytics App

Dashboards in CRM, represents your data in graphical format which allows you to take a quick glance at various important metrics for your business. It consists of various components such as Charts, KPI, Comparator, Anomaly Detector, Target Meter, Funnel, Cohorts, Quadrants. Each component has its way of representing the data and can be chosen accordingly.

Managing your business involves meeting clients, attending conferences, organizing trade shows and so on. When you are constantly on the move, there is a gap between you and the CRM that you use to manage your business. Monitoring the day to day activities such as the tasks that you have, events that you have scheduled, or other metrics such as revenue generated in the current week, number of deals in the pipeline, etc. cannot be tracked when you do not have access to your desktop.

To keep you in the loop, the **Zoho CRM Analytics** app lets you access all the dashboards that you have created from your mobile devices.

- You can view the data that each component represents in the form of a report. The records from the report can also be opened from your Zoho CRM Mobile application.
- You can also share the components of your dashboard via various medium such as Cliq, Whatsapp, Email, etc. This bridges the gap between you and your CRM, by allowing you to access all the metrics and the relevant records wherever you go.

System Requirements

- **Android:** Android 5.1.1 (Lollipop) and above.
- **iOS:** Version 11 and above.

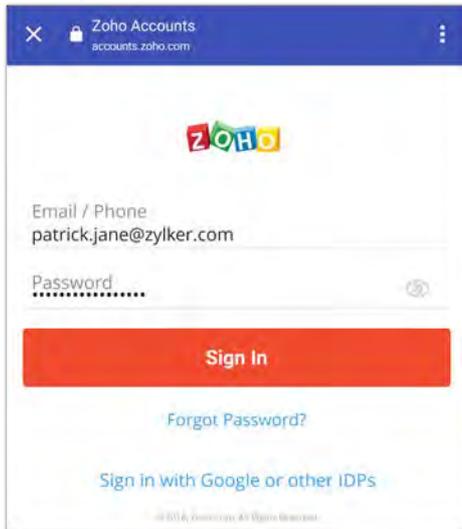
Log in to the application

You can log in to the Zoho CRM Analytics application using the Zoho CRM account credentials. Once you are logged in, all the default and the custom dashboards will be listed.

To log in from android or iOS device

1. Open the **Zoho CRM Analytics** mobile app.
2. Tap **Start/Sign In**.

3. Enter your **Email/Phone** and **Password**, and tap **Sign In**.



Using the Application

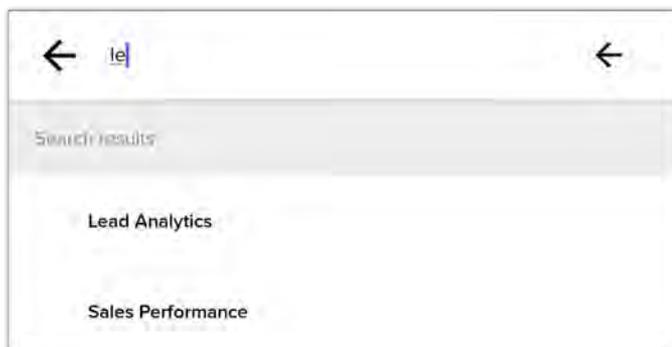
Once you log in to the CRM app, all the default and the custom dashboards that you have created can be viewed. You can further drill down the components present in the dashboard and view the appropriate reports.

Search Dashboards

The search button from the *Dashboards* window helps you find the dashboard that you are looking for.

To search dashboards in Android

1. From the *Dashboards* window, tap the **Search** icon (🔍).
2. Enter the dashboard name in the **Search Dashboard** textbox.
The dashboards matching the search keywords will be displayed.



3. Tap the dashboard from the search results to view them.

To search dashboards in iOS

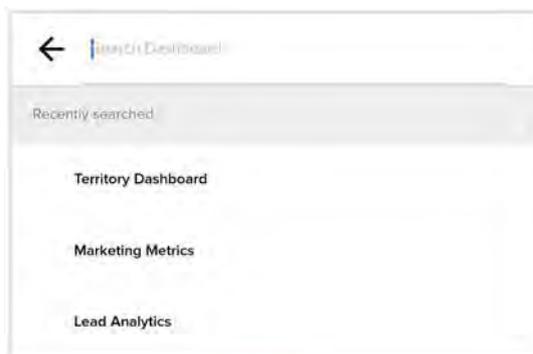
1. From the *Dashboards* window, enter the name of the dashboard in **Search Dashboards** textbox.



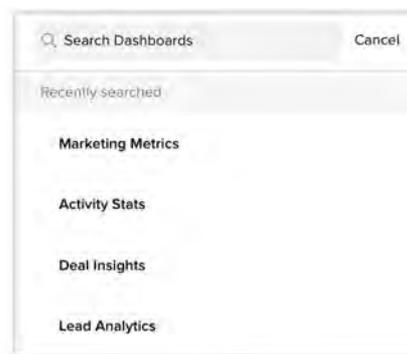
2. Tap the dashboard from the search results to view them.

Recently searched suggestions

All the dashboards that you have recently searched and viewed can be accessed by tapping the **search** icon. You can tap the dashboard that is listed to view them in detail.



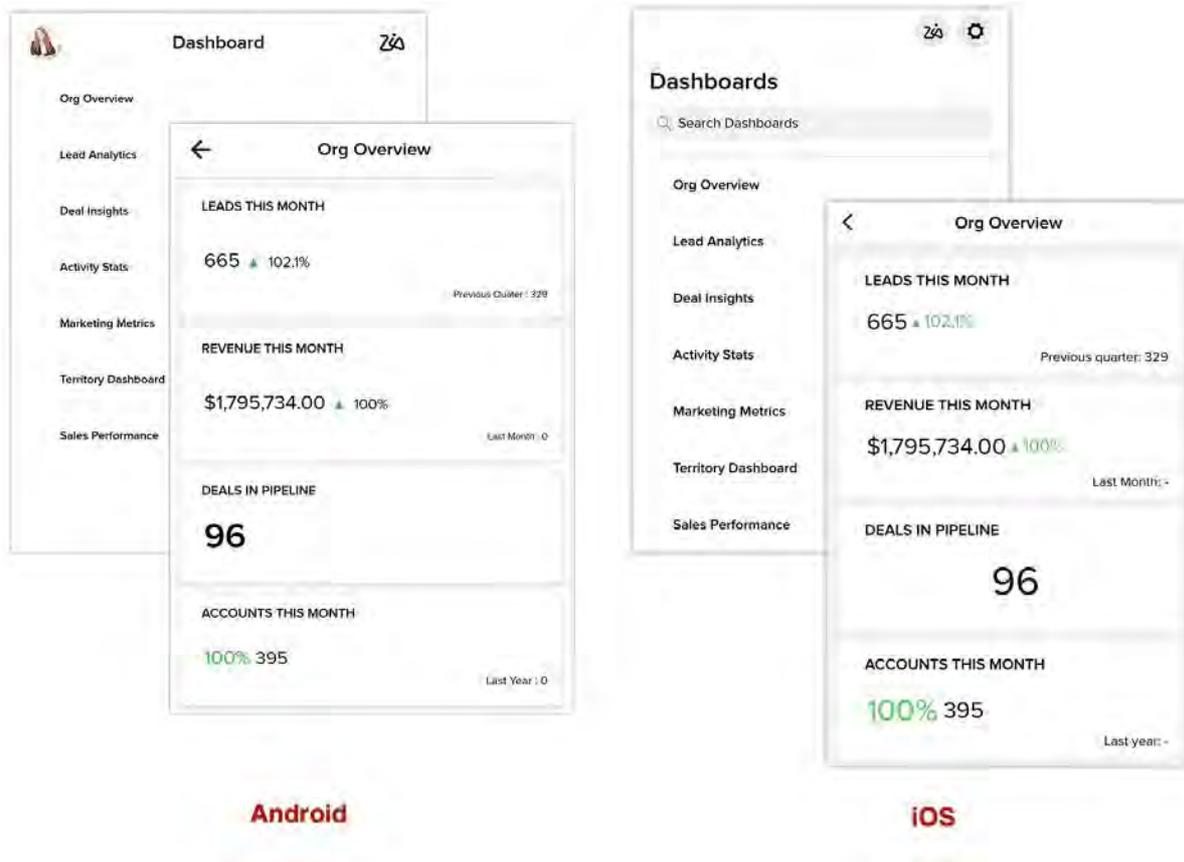
Android



iOS

View dashboard details page

Once you have launched the app, tap on the dashboard that you want to view in detail. This displays all the components that are present in the dashboard. You can further tap on a component to view it in full screen.



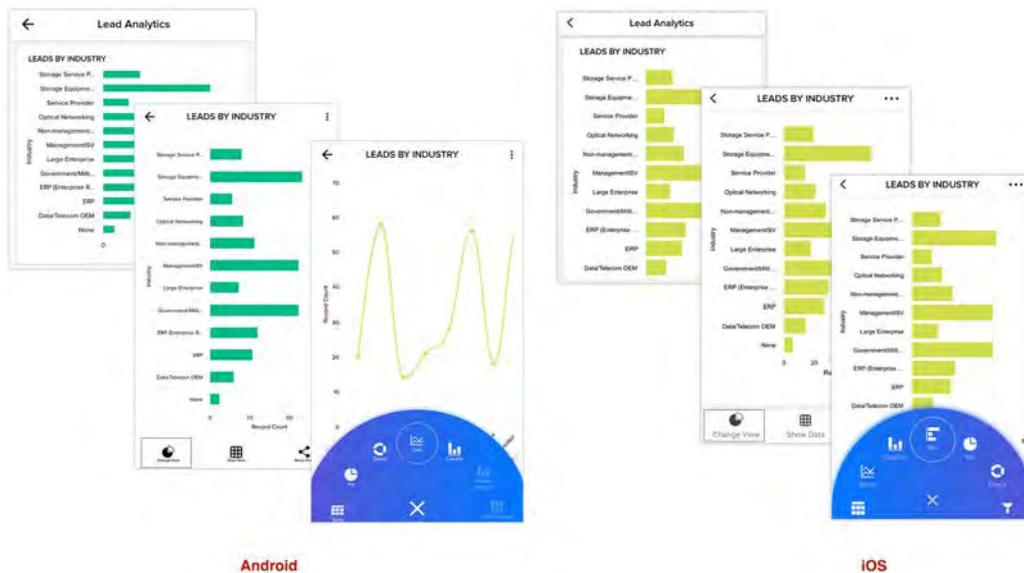
Changing chart view

You can find a variety of chart components such as Bar, Column, Pie, Line, Donut, Table, Area, Heat Map. in your dashboards. If a component in your dashboard is represented in the form of Chart, you can switch between different types of chart and visualize the data. Please note that changing the type of chart here does not change the default chart type of your component.

To switch between different charts

1. Open the Dashboard and tap on the component.
2. Tap on **Change View** button.

3. Choose a type of chart from the *Radial Pie* menu.

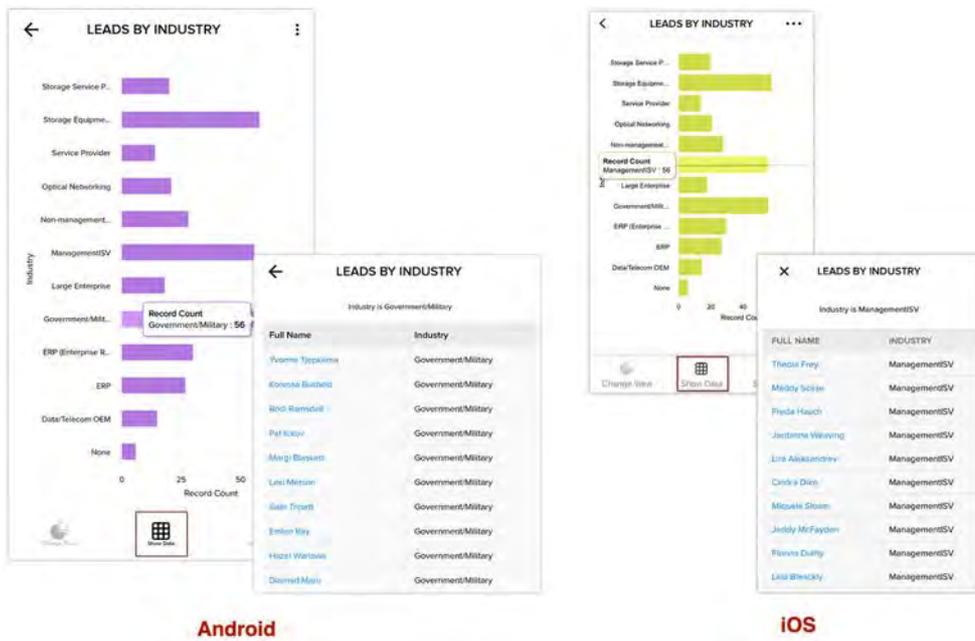


View data represented by the components

A dashboard is a collection of various components and each component displays a specific metric say, *Number of deals in pipeline*. The data is represented based on the type of component in the dashboard and you can further drill down and view underlying data which displays all the records in the form of a report. You can further tap on a record to view the details in your Zoho CRM Mobile application.

To view the data

1. Open a dashboard and select a component.
2. Tap on a region from the component.
3. Tap **Show Data**.
The complete list of data will be displayed.



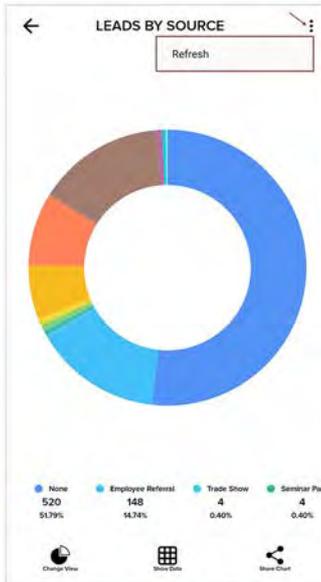
4. Tap on a record from the list to open it in your Zoho CRM Mobile application. If you do not have the Zoho CRM Mobile app, the record will open on your browser.

Refreshing dashboard

Refreshing the dashboard allows you to view the updated changes. You can refresh all the dashboards at once, refresh a specific dashboard or a component in the dashboard.

- In the Dashboards window, swipe down from the top to refresh all the dashboards at once.
- Select a dashboard and swipe from the top to refresh all the components in the dashboard.

- Select the component and click **More > Refresh** to refresh that particular component.



Android



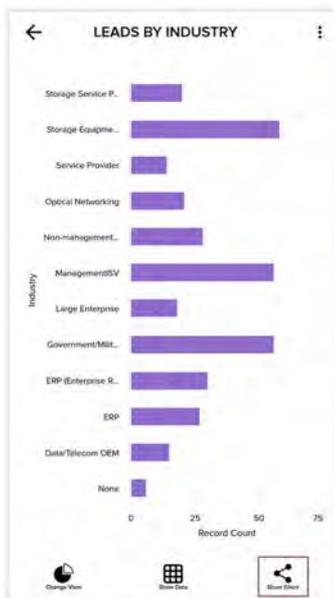
iOS

Sharing dashboard components

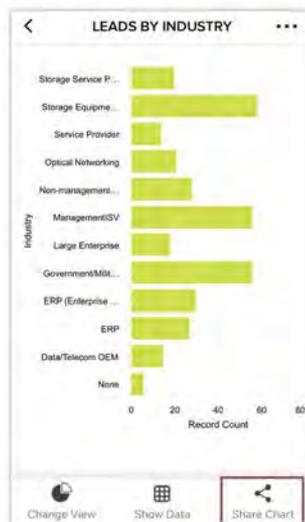
The components present in the dashboard can be shared as an image across various channels.

To share a dashboard component

1. Select a dashboard and tap on the component that you want to share.
2. Tap on **Share Chart** and choose any medium.



Android

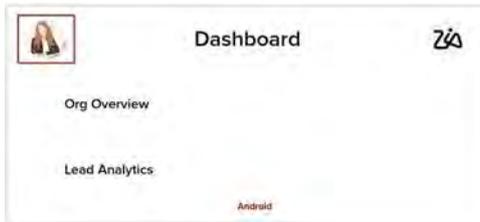


iOS

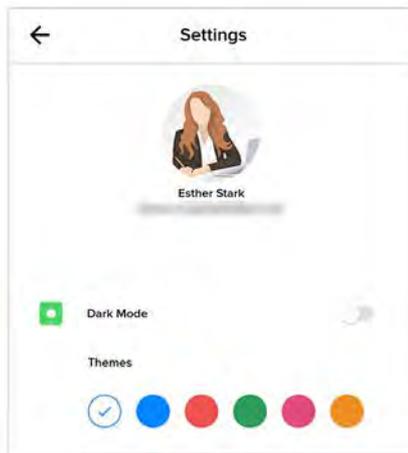
Settings

From the settings window, you can modify the theme of the app, submit feedback and sign out from the application.

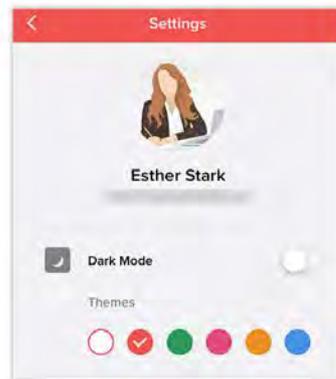
- To go to the settings window, tap on your profile icon from the Android device and the settings icon (⚙️) from the iOS device.



- You can enable the **Dark Mode** toggle switch to view the application in a black background or tap the color under themes.



Android



iOS

- To sign out from the application, scroll down and tap sign out.

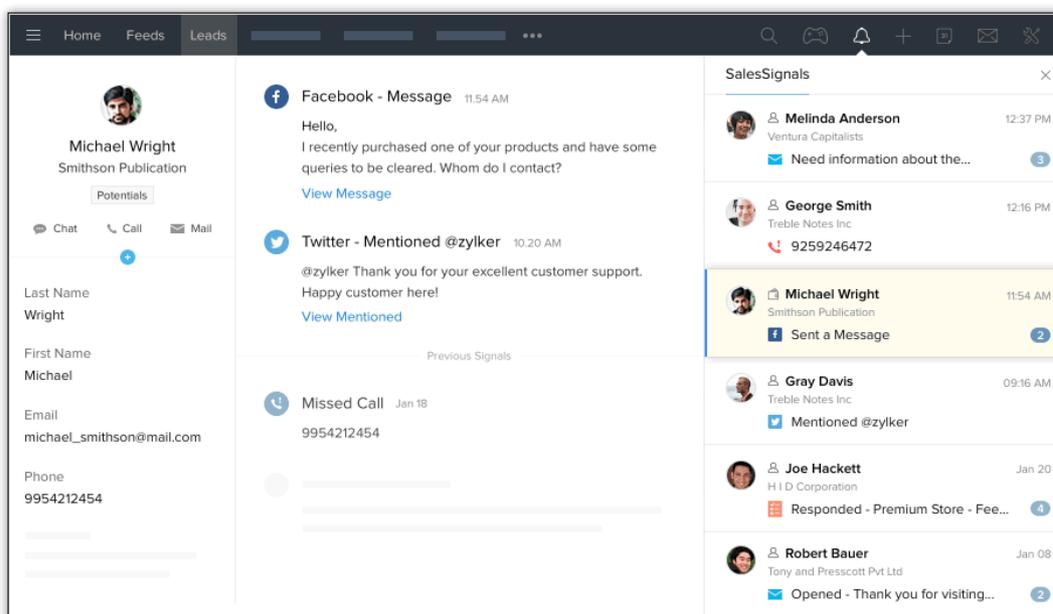
Signals

Signals in Zoho CRM provide real-time notifications of all touch points from your leads, contacts, or potential customers. You can keep track of all the customer interactions across various channels and follow-up with them from one central place, your Zoho CRM account. Signals improve timely communication and enable you to follow-up with your leads and contacts, and close deals quickly.

For example, consider that you have a lead with whom you have scheduled a demo next week. The lead is visiting your website to know more about your products. With Signals, you will receive notification as soon as the lead visits your company's website. You can identify the web pages the lead has accessed, the time spent, and the information your lead is interested in. These details will help you prepare for a demo for the prospect.

You can also receive signals from any third-party application you have installed. All you have to do is integrate these third-party applications with your CRM through APIs.

The below image shows the notifications from different leads, contacts, and potential customers from different applications like email, telephony, and social media sites.

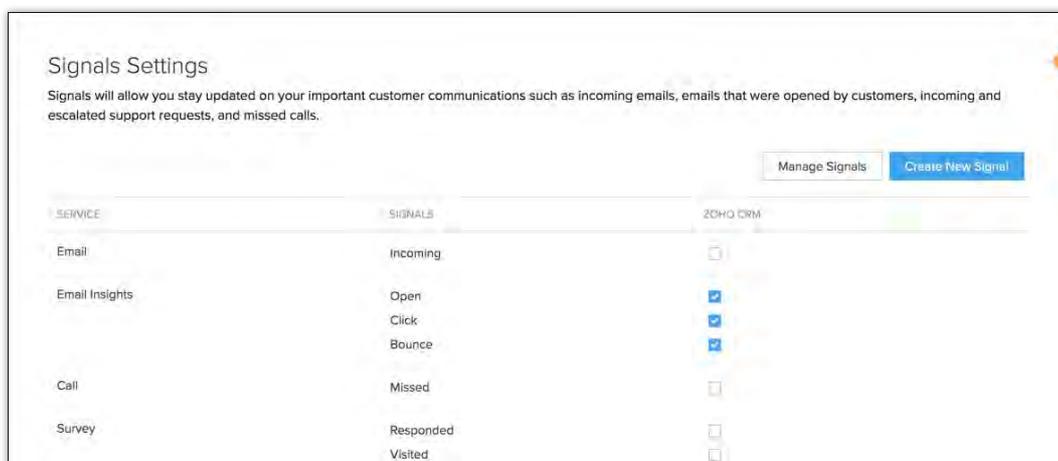


Default Signals through Zoho Integration

Zoho CRM offers signals that are available, by default, from its native integration with other Zoho products such as Zoho PhoneBridge, Zoho Survey, Zoho Campaigns, Zoho SalesIQ, Zoho Desk, Zoho Webinar, and Zoho Backstage. Follow the below steps to enable these signals.

To enable/disable Signals

1. Go to Setup > Channels > Signals.
2. In the *Signals Settings* page, turn the required settings ON to enable or OFF to disable a signal.



The below table lists the type of signals and when they are displayed.

Signal for	Displayed when
Incoming Email	Mails are received from leads, contacts, or potential customers. The Incoming checkbox will be selected by default on enabling Email.

<p>Email Insights</p>	<p>A lead, contact, or potential customer opens an email sent from CRM, clicks a link in the email, or when the email has bounced.</p> <p>The status of the email can be "Opened", "Clicked", or "Bounced".</p> <p>The Signals notifications for Email Insights can be enabled only if you have enabled Email Insights under Settings > Setup > General > Email Settings.</p>
<p>Call</p>	<p>Missed calls are received from leads, contacts, or potential customers. You must activate Zoho PhoneBridge integration in Zoho CRM to enable the Signals settings for missed calls.</p>
<p>Survey</p>	<p>Survey responses are received from leads, contacts, or potential customers. You must integrate Zoho CRM with Zoho Survey Integration to enable SalesSignals for survey responses.</p>
<p>Campaign</p>	<p>A lead, contact, or potential customer opens an email sent from an email campaign, clicks a link in the email, or when the email has bounced.</p> <p>The email status can be "Opened", "Clicked", or "Bounced".</p> <p>You must enable the Zoho Campaigns Integration to enable Signals for campaigns.</p>
<p>SalesIQ</p>	<p>You receive missed chats from leads, contacts, or potential customers. You must activate the Zoho SalesIQ integration to enable SalesSignals for missed chats.</p>

Desk	<p>New support tickets, comments, or responses are received from leads, contacts, potential customers, or customers.</p> <p>You will also receive SalesSignals notifications for support tickets that are overdue or escalated or when a new rating is provided by a customer for a support personnel.</p> <p>You must activate the Zoho Desk integration to enable Signals for support tickets.</p> <p>Note: You can filter the Signals notifications for new tickets, comments, and responses based on leads, contacts, or potential customers.</p>
Backstage	<p>You receive a notification when tickets are purchased and when the attendee checks in to the event or if the ticket is cancelled. You must activate the Zoho Backstage integration to receive backstage notifications.</p>
Webinar	<p>You receive a notification when registrations are made. You must activate the Zoho Webinar integration to receive notifications.</p>

The Signals notifications are displayed when you click the *Notifications* icon () on the top-right corner of the *Zoho CRM home* page. You can identify the SalesSignal type based on the icon displayed below the lead or contact's name and view them. You can receive and view SalesSignals notifications only if they are configured in Zoho CRM.

For more details on how each signal looks upon receiving, refer to the [View Signals](#) page.

Creating Custom Signals

Apart from the default signals, Zoho CRM now allows you to

- Create your own signals.
- Raise them using a function or an API from a third-party application.

- Display the signal as a widget (the way you want it) or show in the Zoho CRM's default view.

Follow the below steps to create a new signal in Zoho CRM.

1. Go to Setup > Channels > Signals.
2. Click **Create your Own Signal**. The *Create New Signal* box opens.
3. Fill in the following details:
 - a. **Label** - Display name of the signal you want to create. This is a mandatory field.
 - b. **Service** – The name of the service you want to receive notifications from. This is the third-party app where the event occurs that you want to be notified of. You can choose from the list of previously created services, or create a new one.
 - c. **Namespace** - Unique value for the custom signal. This namespace is used to raise the signal from custom function or the API. It is treated as the identifier to raise the signal. This is a **system-generated field**; you cannot modify it.
 - d. **Signal icon** - An icon for your custom signal.
 - e. **Trigger Signal via** - The method to invoke the signal. Possible methods are invoking the signal via an API or through a function.
 - f. **Function** - This option will be displayed when you choose to invoke the signal through a function. This drop-down lists the functions of the type "Signals". If there are no functions of this type, you can create a new function from here.
 - g. **Webhook API**- The webhook URL for the function which will trigger the signal. Note that you must register this URL with the third-party service from which you

want to raise the signal when an action happens in that service.

Create New Signal Help

Label: Desk to CRM

Service: Zoho Desk

Namespace: zohodesk_desktocrm

Signal Icon: Choose file No file chosen

Trigger Signal via: Function [Learn More](#)

Function: Raise Signal from Desk

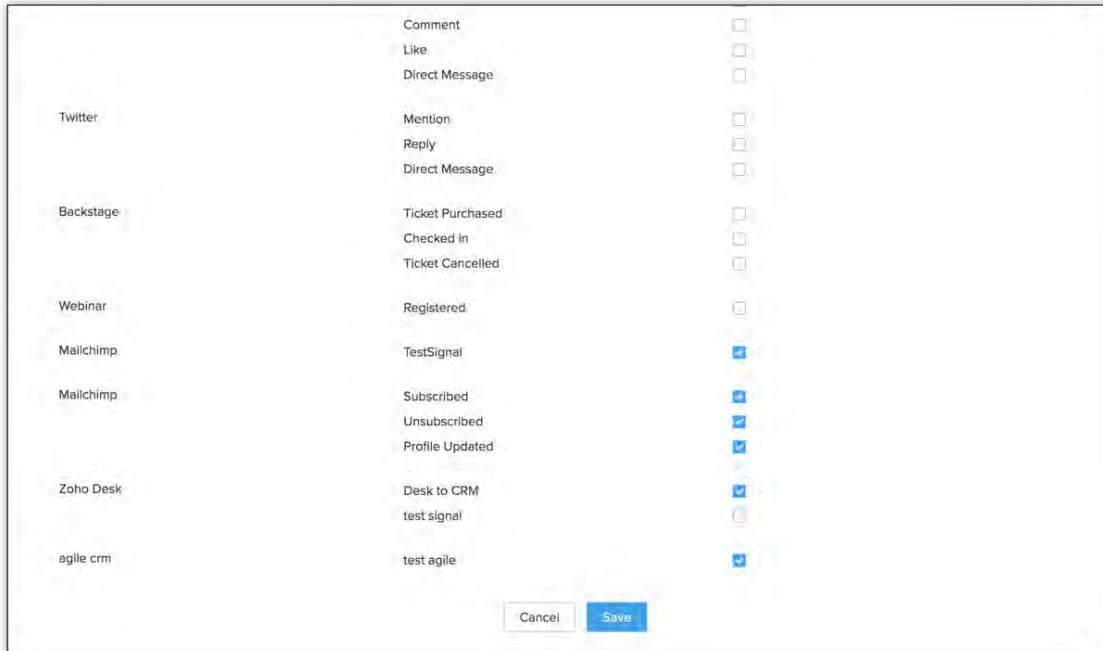
Webhook API: `https://crm.zoho.com/crm/v2/functions/raisesignal/actions/execute?auth_type=apikey&zapikey=1003.6619c5745649c7b6aaf3f2b659074fd5.20a729f3c5eeeb0385f70ea9662e5b6a`

View signal details through: Default View [Preview](#)

[Cancel](#) [Create](#)

- h. **View Signal Details through** - Choose how you want to view the notification from the signal, either in the default view or through a dedicated widget for the signal.
 - i. **Widget** - This option is displayed when you choose to view the notification from the signal in a widget. This drop-down lists the widgets of the type "Signals". If there are no widgets of this type, you can create a new widget from here. Refer to the section "Displaying Signals in a Widget" of this document for more details.
4. Click **Save**.

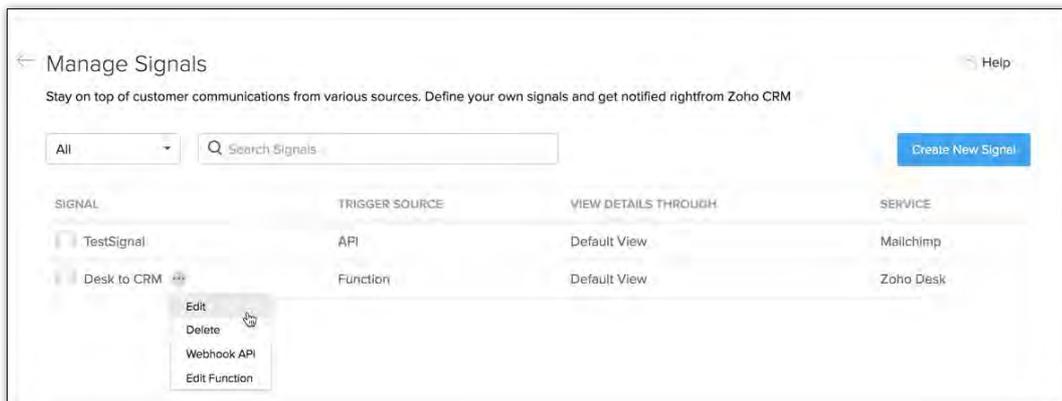
You can now see that the signal is added to the list of signals on the Signals Settings page.



Managing Signals

1. Go to Setup > Channels > Signals > Manage Signals.
The Manage Signals page displays the available custom signals.
2. Click the **more options** icon near the signal that you want to edit.

You can edit or delete the signal, view the webhook API of the function that raises the signal, or edit the function.



Note that these options are available only when your signal is triggered by a function. If your signal is raised by an API, then you can only see the options *Edit* and *Delete*.

Raising a Signal through a Function

You can raise a custom signal that you created through a function. You must invoke the webhook of that function, which in turn, raises the signal.

When should you raise a signal through a function?

1. The third-party (in which the event occurs) allows you to only register a webhook URL in their service.
2. You do not know the format in which the third-party sends back data to the webhook URL when the event occurs.

In both these cases, you need a middle layer (middleware) to

- Consume the webhook call from the third-party application and
- Construct your pay load to raise the signal.

Here, a function can act as a middleware, through which you can provide its webhook URL to get notified of the events in the third-party application. Since most third-party apps support only basic authentication, Zoho allows you to trigger functions with the ZAPI key authentication. Also, you can construct the pay load and trigger the signal through out of the box "integration task" or the invoke URL of the signal.

While creating a signal, follow the below steps to raise a signal through a function.

1. Select the function (of the type "Signals") that you want to bind with the signal from the *Function* drop-down in the *Create your Signal* pop up.
2. The system automatically populates the webhook URL of the function in the Webhook API field. You must register this URL in the third-party service. Whenever an event occurs in the third-party service, this webhook triggers the function which will raise the signal.
3. Select the view type of the signal from the *View signal details through* drop-down.

Sample function code to raise the signal

```
namespace = "zohodesk_newticketalert";
  subject = "New Ticket created #"+ticket_id;
  message = "New Ticket with "+ticket_subject+" created
in Zoho Desk"+" from "+email;
  signalMap = Map();
  signalMap.put("signal_namespace", namespace);
```

```

signalMap.put("email", email);
signalMap.put("subject", subject);
signalMap.put("message", message);
result = zoho.crm.raiseSignal(signalMap);

```

Here, **raiseSignal** is a predefined task in functions. When you pass a constructed map to this connection, it raises the Signal notification. This internally calls the signal notifications POST API.

Note

- If there are no functions of the type "Signals" under the chosen category, you can create a new function from this dialog box. Click *Create New Function* in the *Function* box.
- Your function must have the code to parse the data received from the third-party service, and raise the signal.
- You can have the logic to raise multiple signals in a single function.

Raising a Signal via an API

When should you raise the signal via an API?

When the third-party allows you to make a POST request with the details of the event and supports the OAuth2.0 authentication.

In this case, you can construct a JSON body with the details of the event and make a POST request to the Signals API directly.

When you want to raise a signal through an API, you must establish a connection between the third-party app and Zoho CRM. Refer to [Connections](#) to know more.

Request URL: <https://www.zohoapis.com/crm/v2/signals/notifications>

Request Method: POST

Attributes

Attribute	Description
signal_namespace String, mandatory	Unique name of the signal.
subject String, mandatory	A short description about the signal. Accepts up to 100 characters.

message String, mandatory	A detailed description about the signal. Accepts up to 1000 characters.
email/ID String, mandatory	Email ID of the contact or lead, or the record ID, to whom you want to raise the signal.
actions JSON array, mandatory	Details of the third-party extension such as the display name of the page you want to open, the URL, and how you want to open the link. Refer to the "actions" table for details about each key in this array.

actions

Attribute	Description
type String, mandatory	Represents that the details page of the third-party extension os given as a link. The value for this key is link .
open_in String, mandatory	Represents if you want to open the third-party link in a new tab or as a pop up. The possible values are tab and popup .
display_name String, mandatory	Represents the display name of the link.
url JSON array, mandatory	Represents the URL of the third-party extension.

Note

- You can format the contents of the "message" key. The following are the formatting options.
 - Bold:** Enclose the contents in asterisks (*). Example: *This content is bold.*
 - Italics:** Enclose the contents in carets (^). Example: ^This content is in italics.^
 - Line break:** Use ~br~ to insert a line break. Note that you must not insert a line break between either of the other two formatting options.

Sample POST Body

```
{
  "signals": [
    {
```

```

"signal_namespace": "surveymonkey.responded",

"email": "p.boyle@xyz.com",

"subject": "Welcome Zoho CRM 2020",

"message": "*ZOHOO Corporation* offers ~br~ ^Online      Business, ~br~Network and IT
Infrastructure Management Applications, ~br~ Software Maintenance  and Support Services^",

"actions": [

{

"type": "link",

"open_in": "popup",

"display_name": "View Email",

"url": "www.google.com"

}

]

}

]

}

```

Raising a Signal through Zoho Flow

Zoho Flow is an integration platform which connects cloud applications. It helps you set up workflows to automate information exchange among the apps you use. With Zoho Flow, you no longer need to learn code to integrate.

A flow is the combination of a trigger and action(s). The trigger kickstarts the flow, and the actions are tasks executed by the flow. The trigger can be a data update or a scheduled point in time.

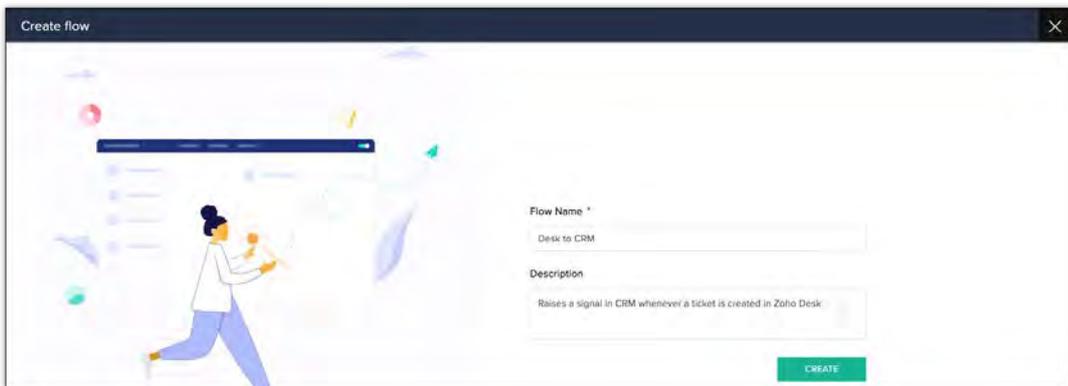
Consider an example where we have a flow that triggers a function in Zoho CRM whenever a new ticket is created in Zoho Desk. Let us now look at the steps to raise a signal in Zoho CRM whenever a ticket is created in Zoho Desk.

Here, you can either use the pre-defined **Raise Signal** integration task as an action block in your flow, or create a custom function to raise the signal.

Creating a Flow using the Raise Signal Integration Task

Raise Signal is a pre-defined action that has the entities to raise a signal from a service and display it in Zoho CRM. All you have to do is, use this action block in your flow and map the fields whose data the third-party service sends with the fields in CRM.

1. Follow the steps in the “Creating a New Signal section” and create a new signal in CRM.
2. Go to [Zoho Flow](#). Log in with your Zoho account, if not already.
The My Flows section opens.
3. Select **CREATE FLOW**.
4. Specify the **Flow Name** and a **description**.

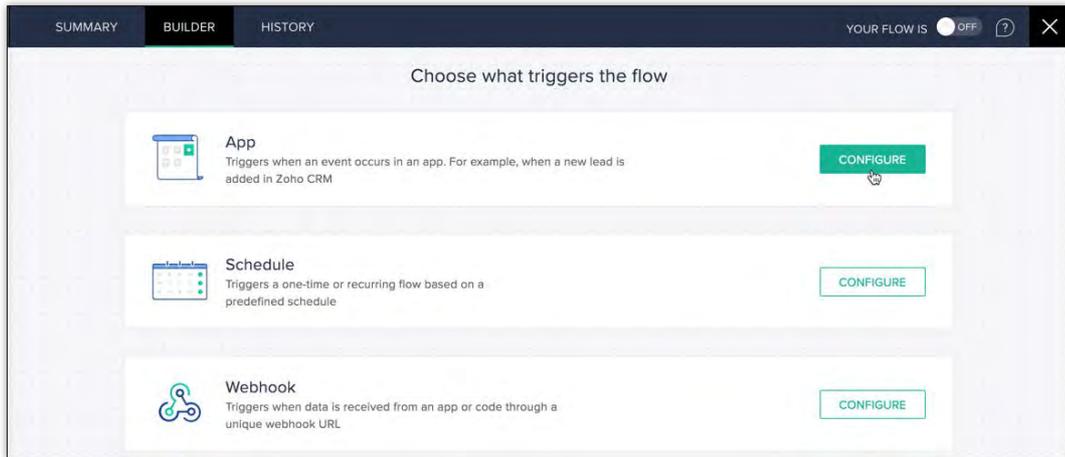


The screenshot shows a 'Create flow' window with a dark header and a close button. The main area is white and contains a form. On the left, there is a colorful illustration of a person in a white shirt and blue pants running towards the right, surrounded by various icons and documents. The form on the right has two input fields: 'Flow Name *' with the text 'Desk to CRM' and 'Description' with the text 'Raises a signal in CRM whenever a ticket is created in Zoho Desk'. A green 'CREATE' button is located at the bottom right of the form.

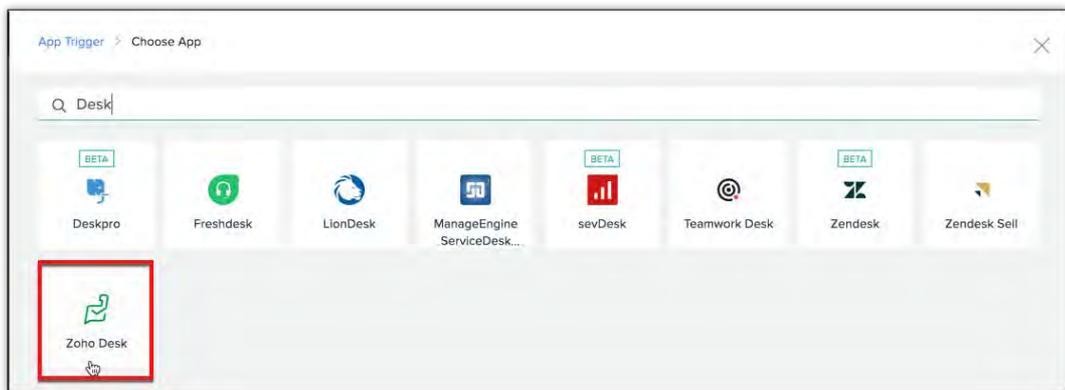
5. Choose what triggers the flow. In our case, it is the App.

6. Select **CONFIGURE** to configure the app.

Flow displays a list of apps.



7. Choose **Zoho Desk** from the list of apps and click **NEXT**.



8. Choose **the Zoho Desk Trigger**.

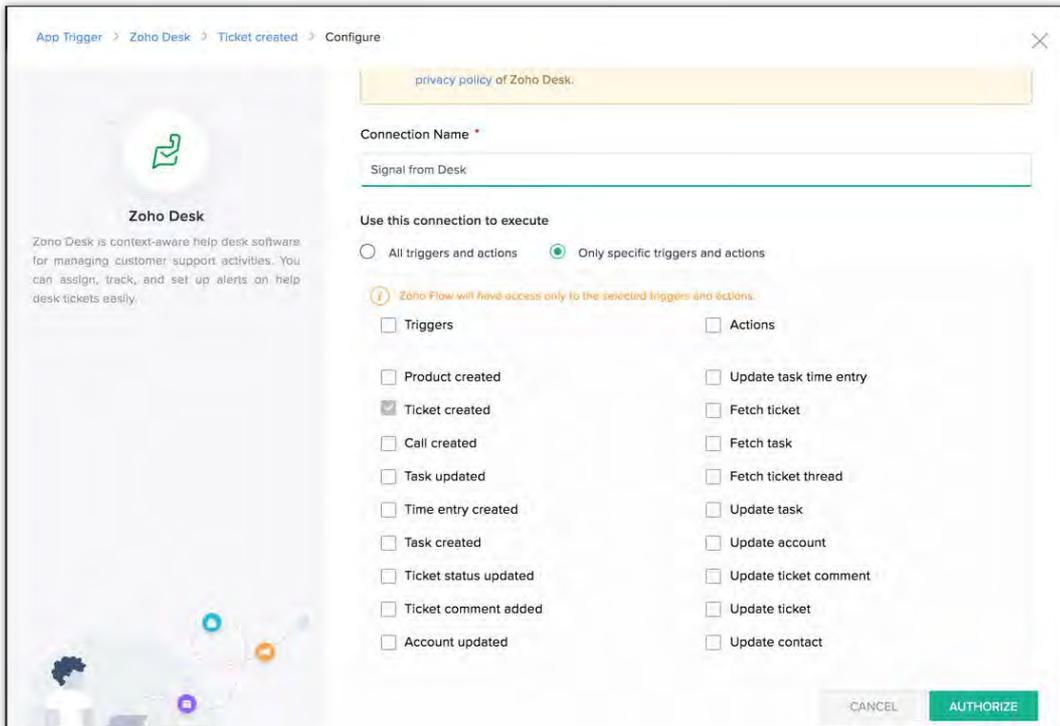
This trigger executes the flow. In our case, **Ticket created** is the trigger.

9. Click **NEXT**.

10. Create a connection to connect Desk and CRM. Specify the connection's name(Signal from Desk) and the triggers and actions that execute the connection.

11. Click **AUTHORIZE**.

Zoho Flow redirects you to Zoho Accounts.

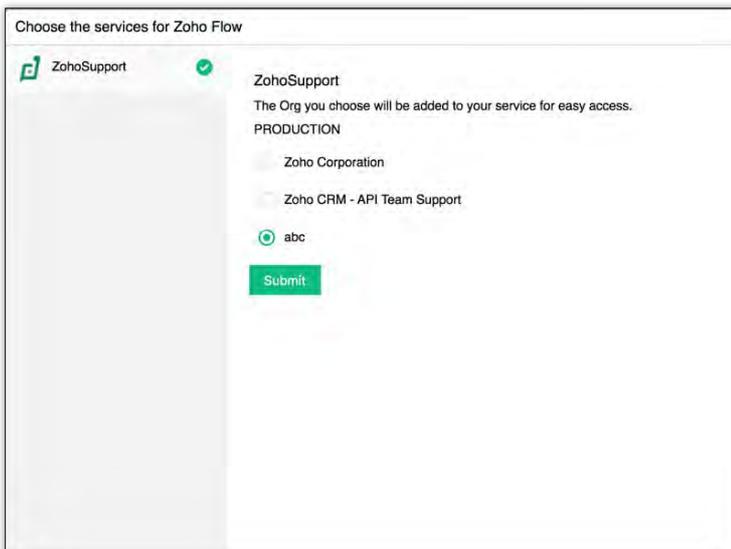


12. Choose the org and the environment you want Zoho Flow to access data from.

13. Click **SUBMIT**.

The resultant page displays the user data that Zoho Flow wants to access.

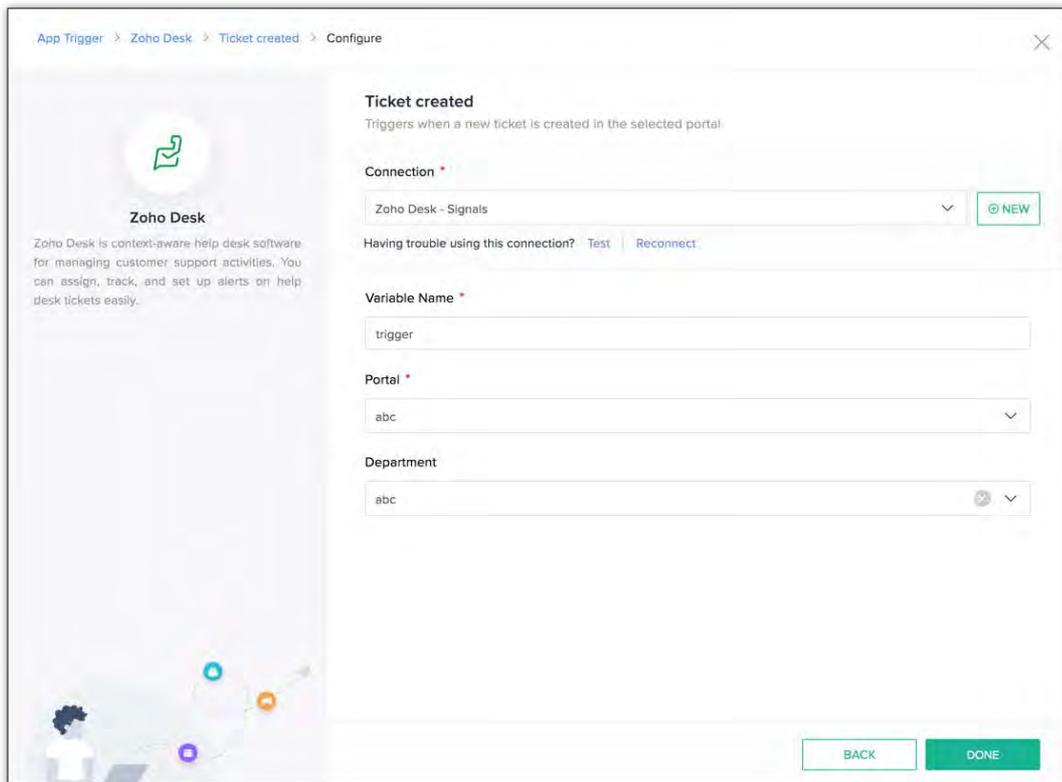
14. Click **Accept** to grant consent.



15. Specify the *Variable Name* for the trigger and choose the portal and the department.

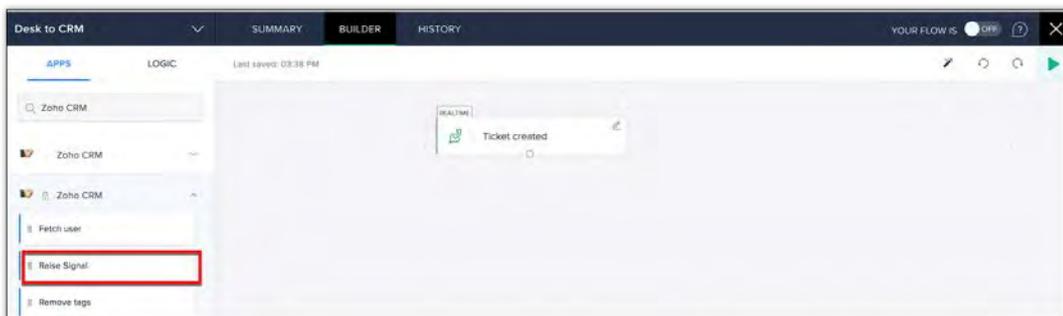
16. Click **DONE**.

Zoho Flow's Builder opens. The builder contains the flow block of Zoho Desk.



17. Under the **APPS** tab, choose the app where you want to send the signal notification to (Zoho CRM, in our case).

18. In that drop-down, you can see multiple action blocks. Select **Raise Signal** and drag and drop this in the builder.



19. A form opens. The *Variable_Name* is already populated; you can choose to edit this, too.

- a. Choose the *Service* where the event occurs (here, Zoho Desk).
- b. Choose the *Signal*.
- c. Choose the *Module*. This is the module in CRM where the system checks for information about the lead or contact that raised the ticket in Desk.
- d. Specify the *Entity ID* (record ID) or the *Email* of the lead or contact that raises the ticket.

- e. Enter the *Subject* and *Message* for the signal notification.
- f. Apart from these system-defined fields, the third-party application may send more information about the event occurrences. You can also capture these information using the custom fields (a maximum of 5 fields are allowed), and send it as a signal information. The data from third party should be mapped in custom field in the <key>:<value> format. Example: average_resolution_time:20minutes.

20. Click **DONE**.

Your flow is now ready.

Creating a Flow through a custom function

You can use a custom function to raise the signal when you have multiple leads or contacts who can raise a ticket.

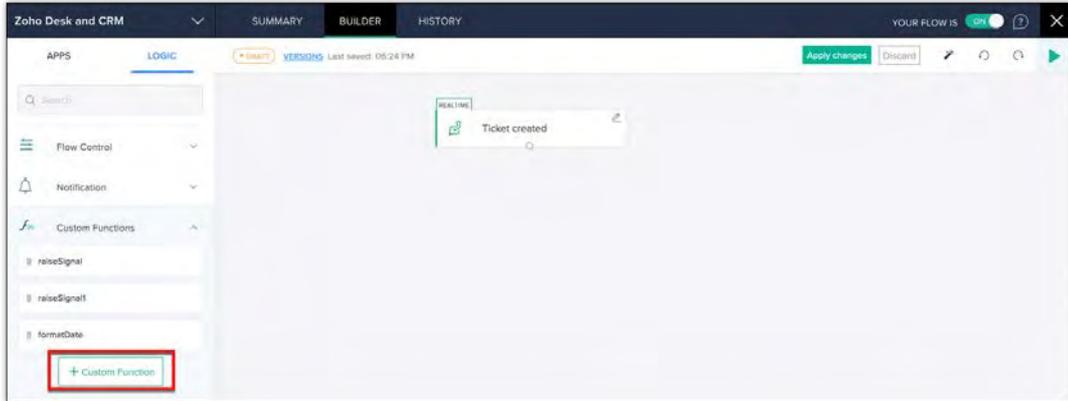
Use the **raiseSignal** integration task in your function code to raise a signal in Zoho CRM. You must pass a constructed map with the details of the notification from the third-party to this integration task.

Note

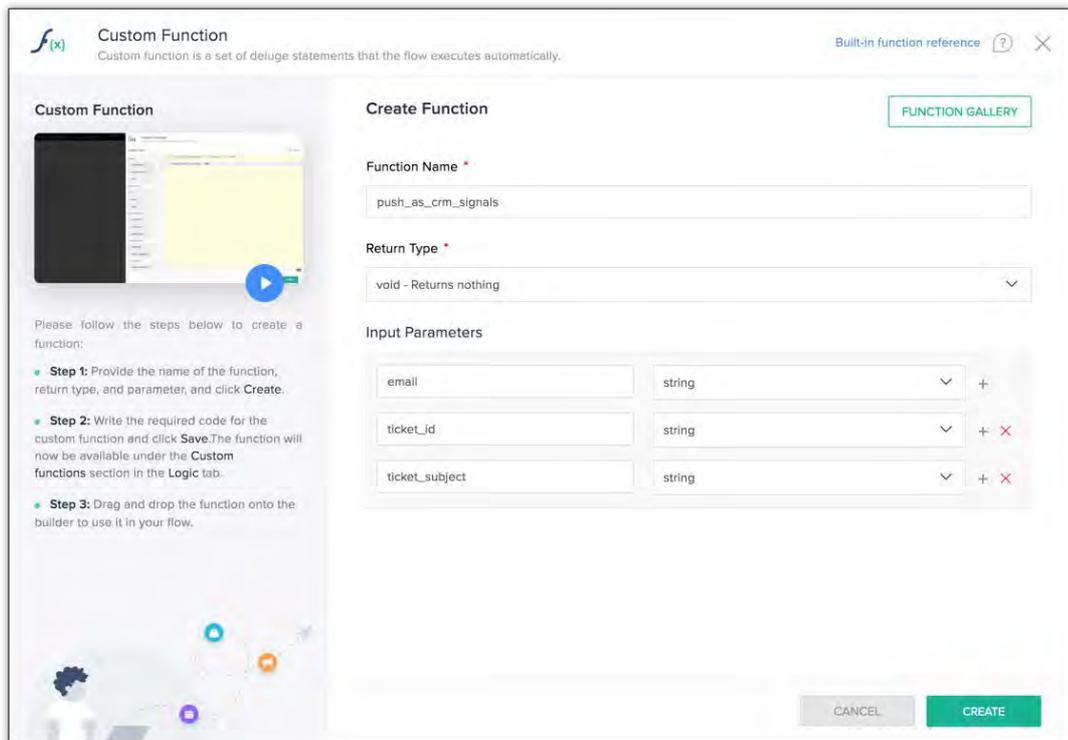
You must make API calls to the third-party service to obtain the necessary details such as the email or any other custom field to include that in the function here.

Follow the steps 1 to 11 in the previous section.

1. Click *+Custom Function* in the left pane to create and associate the function to raise the signal from Flow.



2. Specify the function name and the input parameters with their data types.



3. Click *CREATE*.
4. Use the below code snippet in your function to raise a signal when the event occurs. In this function, `raiseSignal()` is a pre-defined integration task that raises the signal. You must pass a constructed map with the details of the notification to this integration task.

```
void push_as_crm_signals(string email, string ticket_id,
string ticket_subject)

{
    namespace = "zohodesk_newticketalert";
    subject = "New Ticket created #" + ticket_id;
```

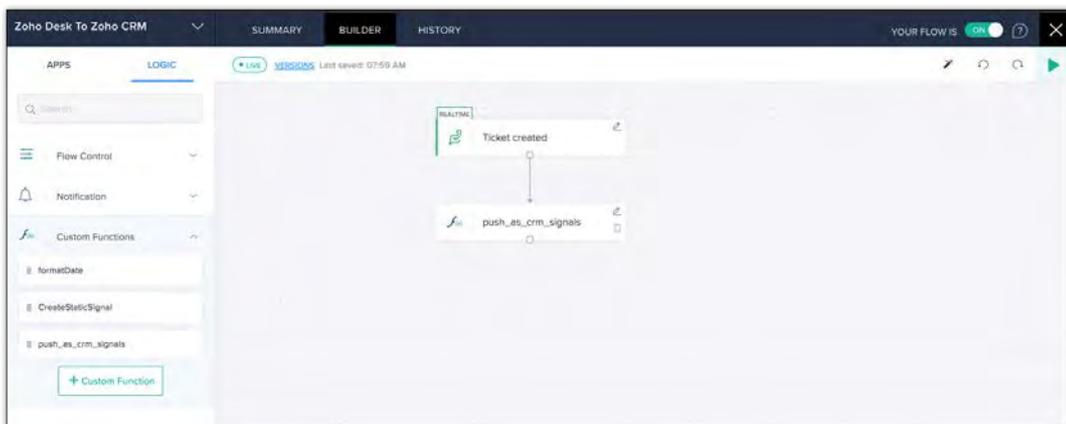
```

        message = "New Ticket with "+ticket_subject+" created
in Zoho Desk"+" from "+email;
        signalMap = Map();
        signalMap.put("signal_namespace",namespace);
        signalMap.put("email",email);
        signalMap.put("subject",subject);
        signalMap.put("message",message);
        result = zoho.crm.raiseSignal(signalMap);
    }

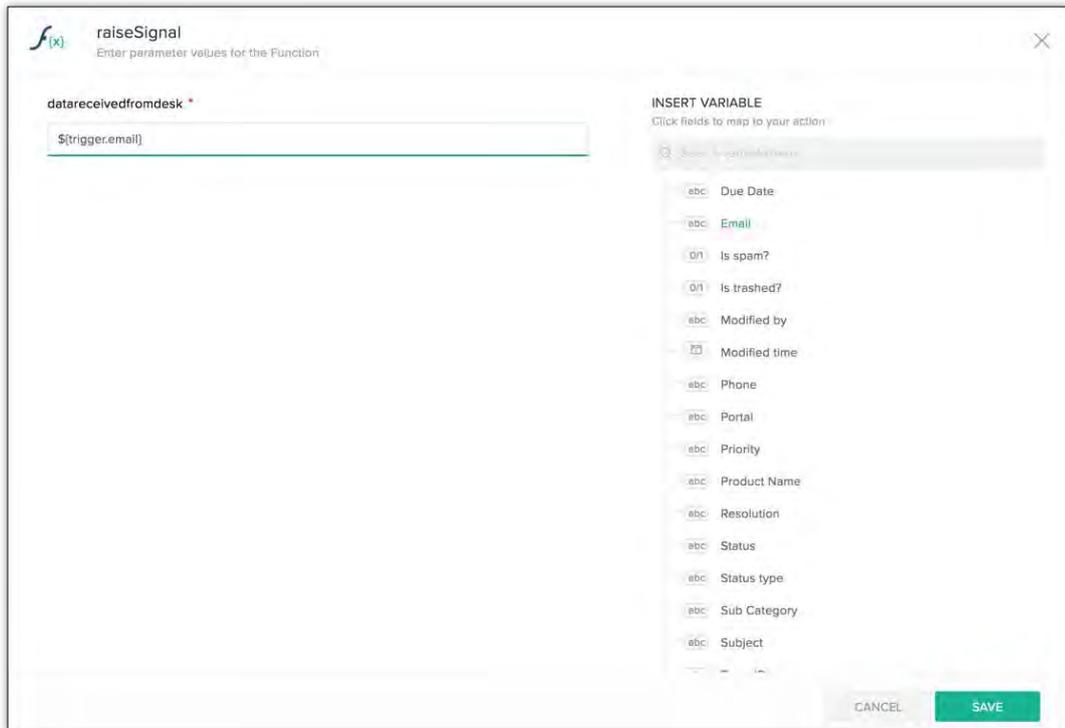
```



5. Click **SAVE**.
6. Use the **EXECUTE** button to test the correctness of your function.
7. Drag and drop this function from the left pane to the builder.



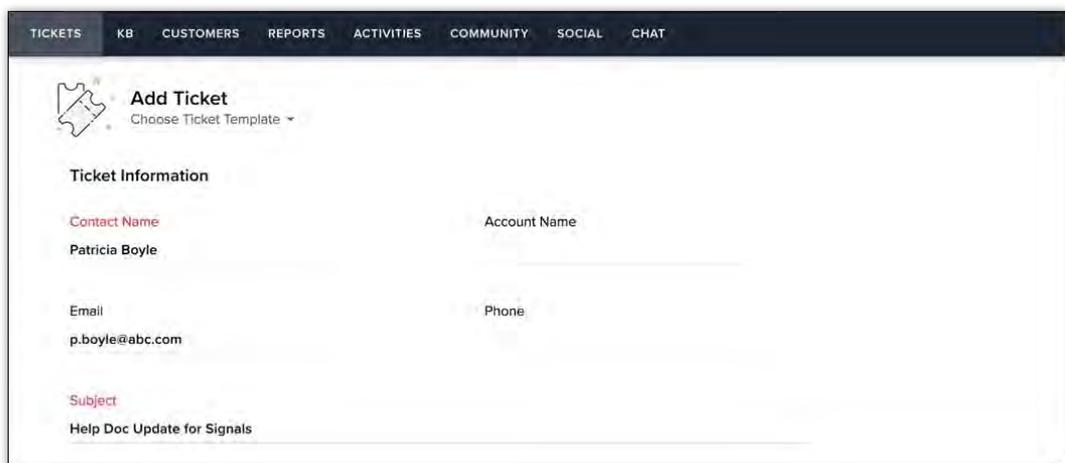
- Click the edit icon in the function block inside the builder.
This opens the window to map the fields in Desk with the function's parameter.
- Choose the email field as the function takes email of the lead or contact that created the ticket as the value to the parameter.
- Click **SAVE**.



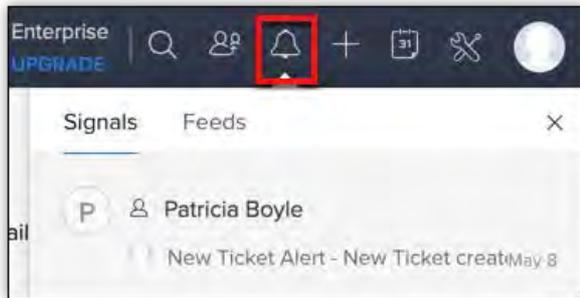
- Click the play button at the top right corner of the builder to test the flow.

Testing the Flow and Raising the Signal in CRM

- Create a ticket in Desk. Note that the person who creates the ticket must be a contact in CRM. If not, Desk creates a contact in that name with that email ID.



2. Go to CRM.
The bell icon notifies you of a new signal.
3. Click it to open the notification.



Displaying the Signal in a Widget

While creating a custom signal, you can choose to display the signal in the default view or as a widget.

The Default View



This is a very basic view of the signal with the data from the function that raises the signal.

The Widget View

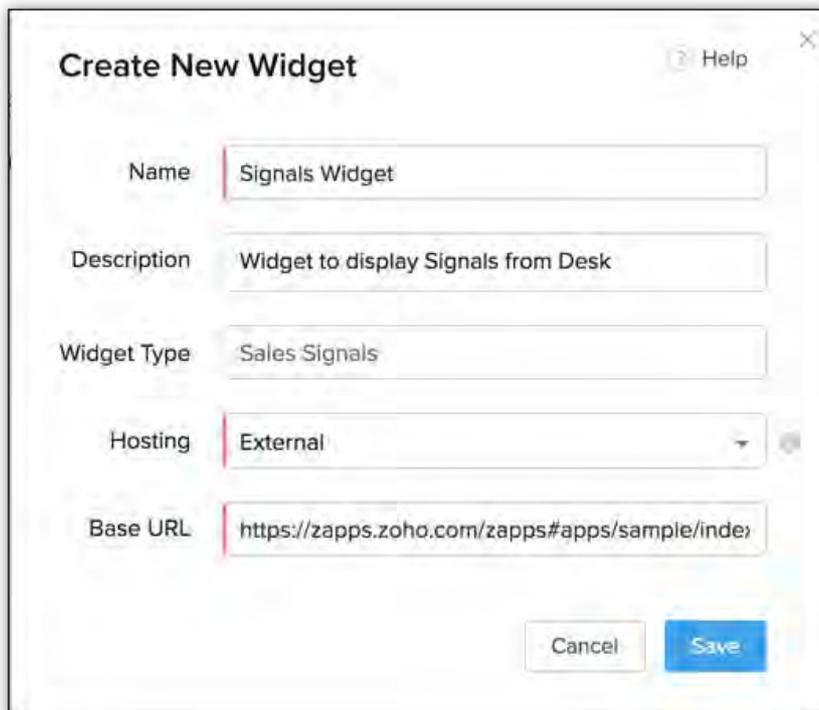
Widgets are embeddable UI components that display data from a third-party app as per your requirement. You can write your own HTML and JS code, and use them in CRM to present the data according your needs.

Let us consider an example scenario where we have a survey in Zoho Survey. When a user responds to that survey, a function raises the signal in Zoho CRM and displays the details of the survey in a widget.

Follow the same steps as mentioned in the **Creating a New Signal** and the **Raising a Signal through a Function** sections. When you want to display the signal in a widget, choose the option **Widget** from the *View signal details through* drop-down.

Creating a Widget

1. Choose the widget from the list if you already have widgets of the type "Signals". If not, select *Create NewWidget*.
2. Specify a name, description, and the hosting type of the widget.
3. Based on the type of hosting, specify the base URL of the widget (for external hosting) or the index page and upload the file that contains the widget's HTML (for internal hosting).



The screenshot shows a 'Create New Widget' dialog box. The fields are filled with the following information:

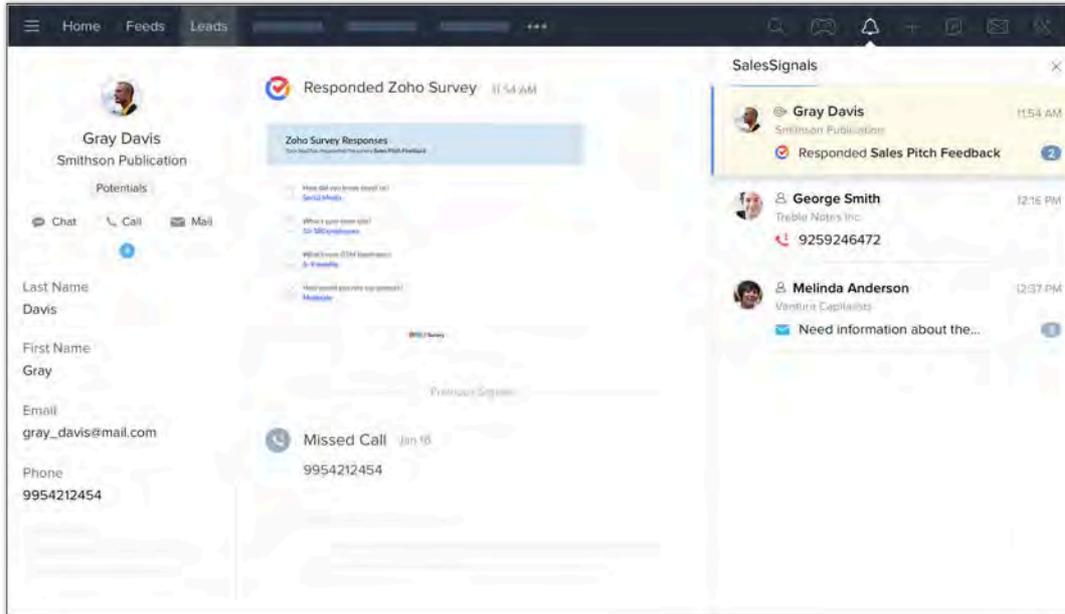
- Name:** Signals Widget
- Description:** Widget to display Signals from Desk
- Widget Type:** Sales Signals
- Hosting:** External
- Base URL:** https://zapps.zoho.com/zapps#apps/sample/inde

Buttons: Cancel, Save

4. Click **Save**.

The widget will be created and displayed in the Create New Signal pop up.

Here is a sample of how the widget displays a signal in Zoho CRM.



For more details about widgets, refer to [Installing the CLI](#) and [JS SDK for Zoho CRM](#).

You must send the details of the signal to the widget through PageLoad.

PageLoad Data for the Widget

```
{  
  
  "record": {  
  
    "id": "644958000000452257",  
  
    "module": "Leads",  
  
    "name": "Boyle",  
  
    "email": "p.boyle@abc.com"  
  
  },  
  
  "data": {
```

```
"AUDITEDTIME": "2020-04-28 12:00:54.0",  
  
"subject": "Zoho Survey Notification",  
  
"message":  
"best_crm=HubSpot+CRM&best_browser=Mozilla+Firefox&best_mail=Zoho+Mail&  
survey_title=Product+Feedback"  
  
}  
  
}
```

The PageLoad data contains two keys viz, record and data.

The “data” key consists of the response from the survey from the user. In our case, this contains the answers to the survey questions. The widget parses this data and displays it.

