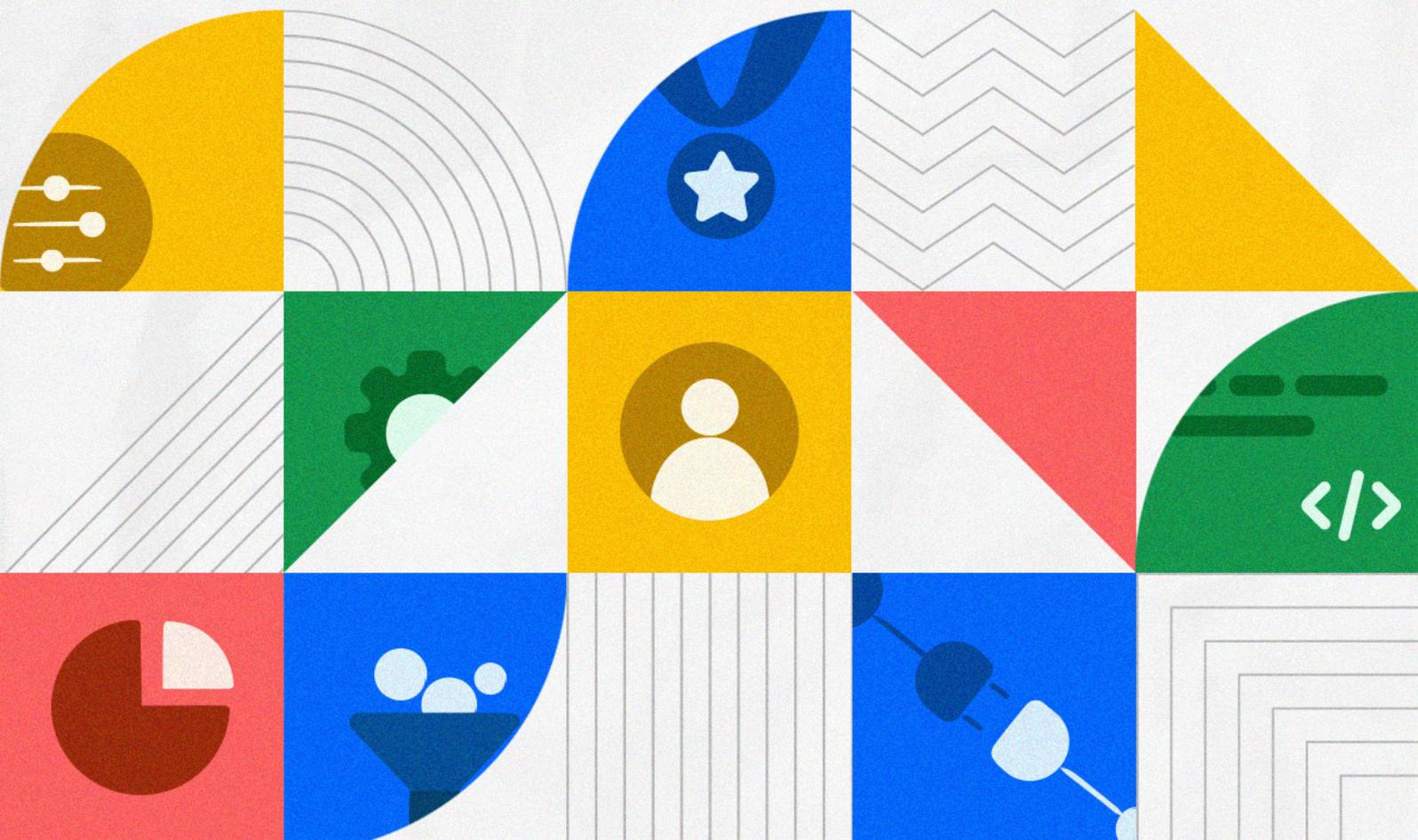ZOHO CRM

ADMIN AGENDA

Summary
of the Agenda

Online training: 4 days, 7+ hours per day

Virtual training: 4 days, 8 hours per day

Who it is for:

CRM admins who are responsible for the setup, configuration, and maintenance of their organization's Zoho CRM software.

Day-1

General

○ **Personal Settings**

○ **Company Details**

Sales Process Automation

○ **Leads, Contacts, Accounts, Deals, and Campaigns**

○ **Activities (Tasks, Meetings, and Calls)**

○ **Calendar Booking**

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Inventory Management

○ **Products, Quotes, Invoices, and Sales Orders**

○ **Purchase Orders, Price Books, and Vendors**

Support

○ **Cases and Solutions**

Users and Control

○ **Users**

○ **Security Control**

○ **Compliance Settings**

○ **Territory Management**

User Interface

○ **All mass actions (Emails, Field Updates, Changing Owner, Conversion)**

○ **Macros**

○ **Manage Tags**

○ **Merge Duplicates**

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Day-2

Basic Customizations

- ○ **List View**

- ○ **Kanban View**

- ○ **Canvas View**

- ○ **Advanced Filters**

- ○ **Business Card View**

- ○ **Related List Customization**

Advanced Customizations

- ○ **Modules and Fields**

- ○ **Templates**

- ○ **Wizards**

- ○ **Pipelines**

- ○ **Copy Customization**

- ○ **Customize Home page**

- ○ **Translation**

Day-3

Channels

- ○ **Emails**
- ○ **Telephony**
- ○ **Social**
- ○ **Chats**
- ○ **Signals**
- ○ **Portals**

Automation

- ○ **Workflow and Actions**
- ○ **Schedules**
- ○ **Assignment Rules**
- ○ **Case Escalation Rules**
- ○ **Scoring Rules**
- ○ **Marketing Attribution**
- ○ **Segmentation**

Day-4

Process Management

- Blueprint
- Approval Processes
- Review Processes
- CommandCenter

Data Administration

- Import (module-specific and data migration from other CRM)
- Export
- Data Backup
- Storage
- Recycle Bin
- Audit Log
- Sandbox

Marketplace

- All
- Zoho
- Google
- Microsoft

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Other Modules

- Reports and Dashboards
- Forecasts
- Feeds
- Motivator

Developer Space

- Webforms and Analytics
- Webform A/B Testing

Mobile Apps

- CRM Mobile App
- CRM Analytics App

Zoho Directory

- Single Sign-On (SAML)
- Security Policies
- Active Directory Sync
- Login History

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Zia in Zoho CRM

What's New

- Canvas Builder
- Admin Tools

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For more information
Email: training@zohocorp.com