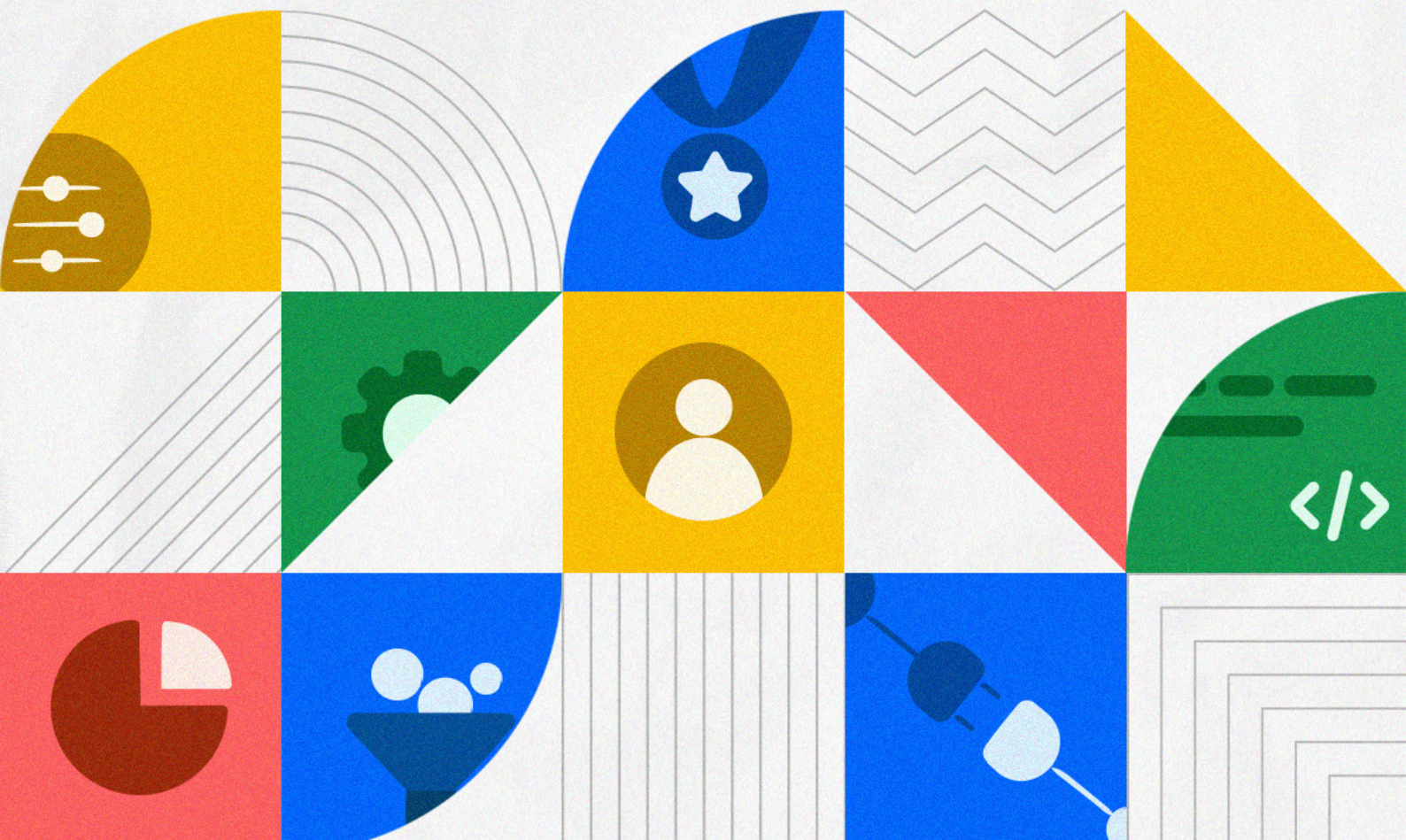


# **SALES MANAGERS AGENDA**







# Summary of the Agenda

Duration: 3 days, 6 hours per day

## Who it is for:

Sales managers and team leads who oversee, guide, and/or support salespeople within their department or across the organization.

## Day-1

### Setting up your account

- Accessing Zoho CRM
- Customizing your personal information

### Sales Process Automation

- Leads, Contacts, Accounts, Deals, and Campaigns

# Inventory Management

- Products, Quotes, Invoices, and Sales Orders
- Purchase Orders, Price Books, and Vendors

# Follow-Up and Collaboration

- Tasks
- Meetings
- Calls
- Calendar Booking

# Mass Actions

- Macros
- Working with Tags
- Mass Emails
- Mass Conversion
- Transferring Ownership
- Deleting Records
- Updating Fields

# Day-2

## Customization

- Different types of views
- Advanced Filters
- Templates (Email and Mail Merge templates)
- Home page Customization (user-specific)

## Channels

- Email Integration (using IMAP or POP)
- BCC Dropbox
- Social communication with prospects
- Signals

## Collaborations and Reports

- Reports and Dashboards
- Forecasts
- Feeds

## Sales Performance Management

- Motivator

# Day-3

## Automation

- Workflow Operations
- Actions that help in automation
- Lead Scoring
- Assignment Rules
- Case Escalation Rules

## Integrations

- Google (Calendar, Contacts, and Chrome Extension)
- Microsoft

## Overview of Process Management

- Blueprint
- Review Processes
- Approval Processes

# Data Administration

- Import (module-specific)
- Import History
- Export
- Recycle Bin
- Working with Sandbox

# Zia in CRM

- Suggestion by Zia - best time to contact
- Data Enrichment by Zia
- System Recommendations
- Ask Zia

# Mobile App

- Zoho CRM Mobile
- Zoho CRM Analytics



For more information  
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