

# Zoho CRM Overview

Trusted by 45 million users worldwide



# Zoho in numbers



# Global Footprint



## What our customers think about us:

**Gartner®**

**4.3/5**

**GetApp®**

**4.19/5**

 **Capterra**

**4/5**



**FinancesOnline**  
REVIEWS FOR BUSINESS

**9.4/10**





Zoho customers include

**NETFLIX**

**KPMG**



**amazon.in**

**facebook**

**L'ORÉAL**



**SAMSUNG**

**HYATT®**



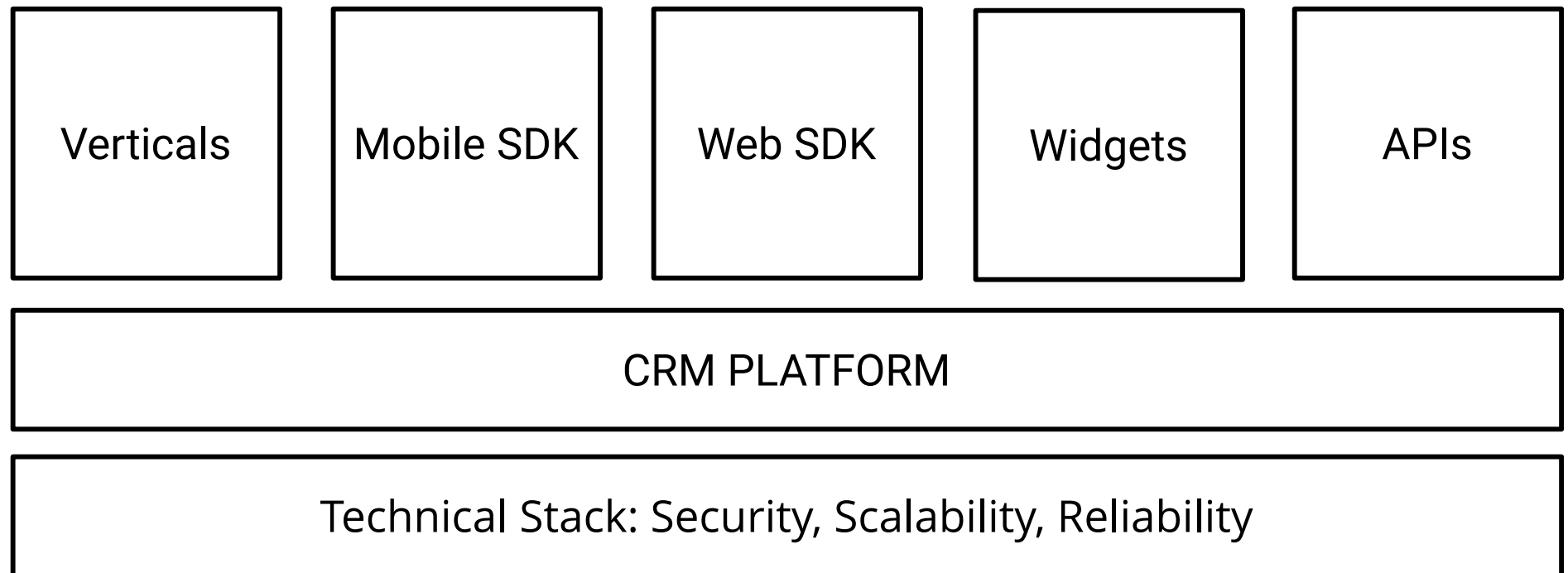


**ZOHO CRM**

Let's dive in...



# Zoho CRM as a platform



# Key Differentiators - Functionality

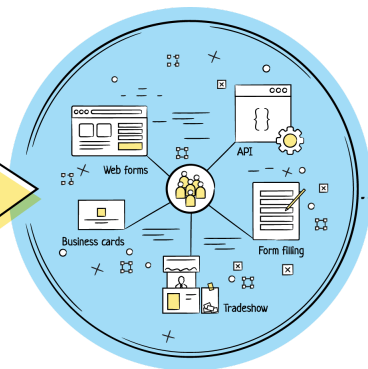
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- **Multichannel communication** - Email, Phone, Chat, Social Media
- **Blueprint** - Powerful process automation
- **Multi-user portals** - Bring in customers, vendors and partners together
- **SalesSignals** - Real-time analytics and notifications to reach out to every customer
- **Artificial Intelligence** - Zia, our first AI powered conversational Sales Assistant
- **Zia Voice** - The first conversational AI for sales, and support.
- **Zia** - built-in AI with Anomaly detection, prediction, sentiment analysis.

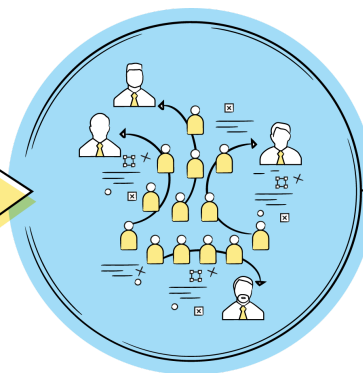




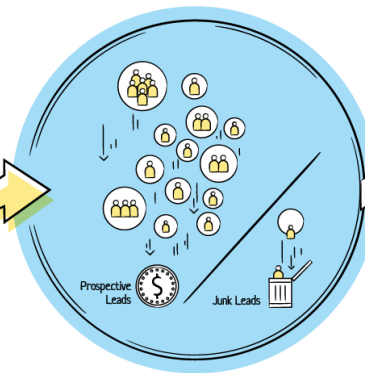
**Run Campaign**  
Email, Magazine Adverts, etc.



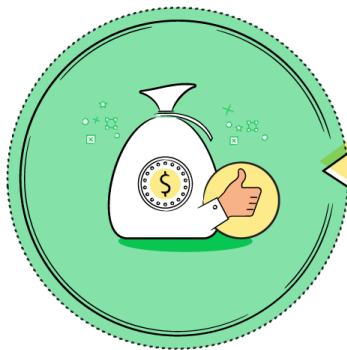
**Capture Leads**  
Through Manual, Automated method



**Assign Leads**  
Sales Executive



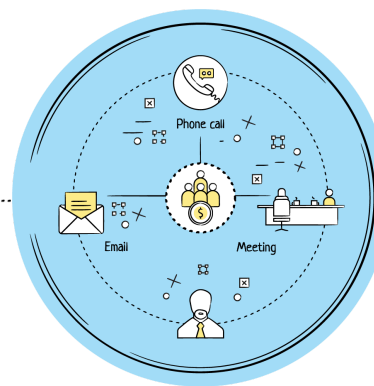
**Qualify Leads**  
Converts genuine leads in to prospects



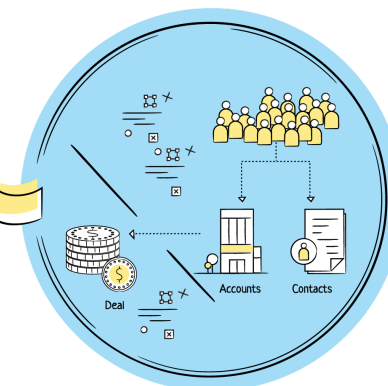
**DEAL WON**  
Succesfully



Deal Lost



**Follow-up Deals**  
Phone, Email Direct Meeting, etc



**Convert Leads**  
Account, Contact & Oppurtunity

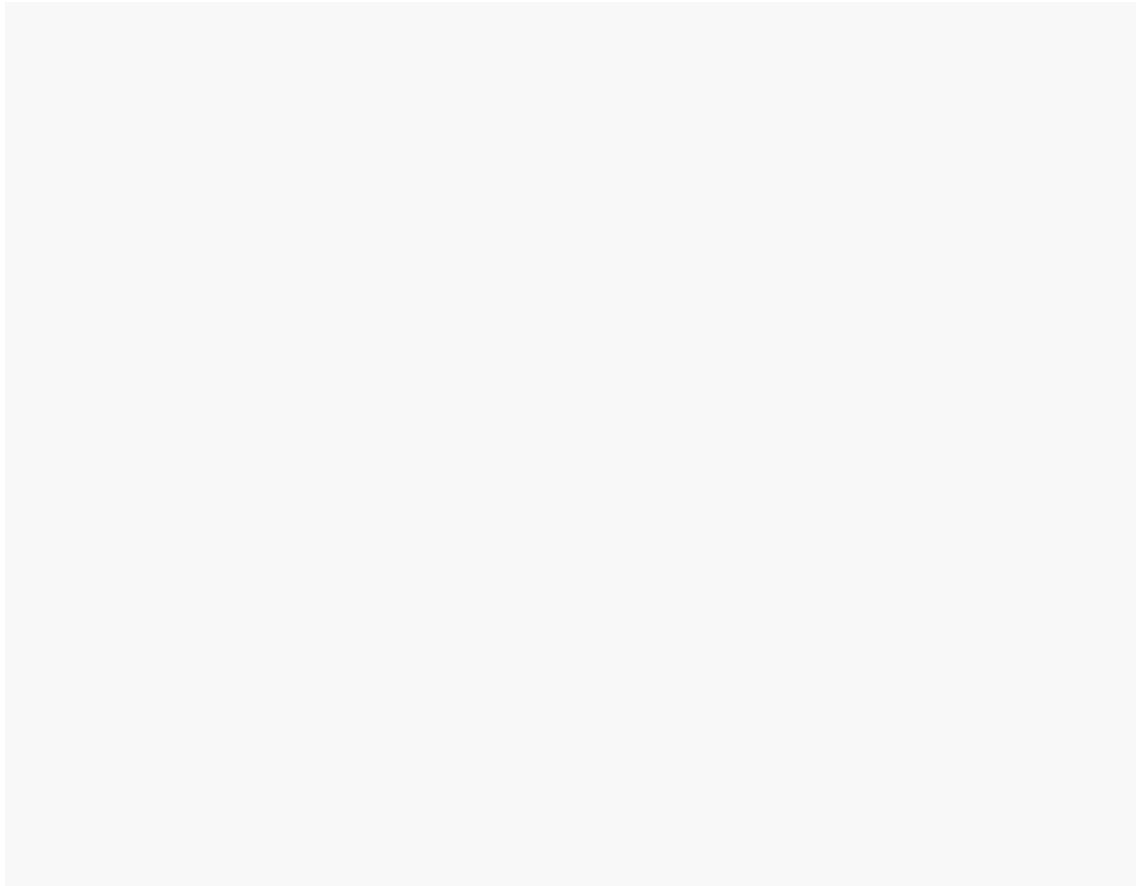


## Customize your CRM - the way you want

Why learn a new system which can both be tedious  
and time consuming?

With Zoho CRM, **make the system work for you.**  
Customize it the way you want, and **close more deals**  
**in less time.**





Create advanced filters and narrow down large volumes of leads or deals to the ones that are most important to you.

Advanced  
Filters



## Customize your CRM the way you want

The screenshot displays the 'Create Deal' form in Zoho CRM. The top navigation bar includes links for Home, SalesInbox, Feeds, Leads, Accounts, Contacts, Deals (active), Activities, Reports, and Projects. The 'Create Deal' header has a dropdown menu set to 'Standard' and buttons for 'Save', 'Save and New', and 'Cancel'. A dropdown menu is open under 'Standard', showing options: 'Product - Widget A', 'Product - Widget B', and 'Standard'. The form is divided into two main sections: 'Deal Information' and 'Description Information'. The 'Deal Information' section contains two columns of fields. The left column includes 'Deal Owner' (Amelia Burrows), 'Deal Name' (1000 Widgets B Deal), 'Account Name' (Wulfram's Engine Block), 'Type' (Existing Business), 'Expected Revenue' (\$ 20000.00), 'Lead Source' (Advertisement), 'Contact Name' (Johann Wulfram), and 'Currency' (USD). The right column includes 'Amount' (\$ 100000), 'Closing Date' (08/09/2017), 'Stage' (Needs Analysis), 'Probability (%)' (20), 'Next Step' (Follow-up), 'Campaign Source', and 'Exchange Rate' (1.000000000). The 'Description Information' section has a 'Description' field.

Deal Information	
Deal Owner	Amelia Burrows
Deal Name	1000 Widgets B Deal
Account Name	Wulfram's Engine Block
Type	Existing Business
Expected Revenue	\$ 20000.00
Lead Source	Advertisement
Contact Name	Johann Wulfram
Currency	USD

Deal Information	
Amount	\$ 100000
Closing Date	08/09/2017
Stage	Needs Analysis
Probability (%)	20
Next Step	Follow-up
Campaign Source	
Exchange Rate	1.000000000

**Description Information**

Description

Manage multiple products, branches from one unified CRM system using Page Layouts.

Page Layouts





## Customize your CRM - the way you want

Play with customization. Deploy with confidence.

With Zoho CRM's **Sandbox** feature, allow developers **create and play with customizations** on your account without accessing your Zoho CRM data.

"Beta test" customizations before deploying the changes to your Zoho CRM account.



# Customize your CRM - the way you want

Zylker's Sandbox

Test all customizations here before deployment.

Created by: [Amelia Burrows](#) | Accessible to: [Amelia Burrows](#), [Tina](#), [Luke Marciano](#), and [1 more](#)

Refresh SandBox

Go to Sandbox

...

CHANGE SET

DEPLOYMENT LOGS

CLEAR

Any time


All Components & Items

All modules


All Action

All Users


Feb 22




**Amelia Burrows**  
CEO, Administrator

 Fields named **Lead Referrer** was Updated for Lead module.


Feb 22




**Amelia Burrows**  
CEO, Administrator


 Assignment Rules named **Lead Assignment - APAC** was Created for Lead module.


Feb 22




**Amelia Burrows**  
CEO, Administrator

 Layout Rule named **High Value Deals** was Created for Lead module.

 Layout named **Standard** was Updated for Lead module.

 Fields named **Lead Referrer** was Created for Lead module.

 Link named **Widget Cancellation Initiator** was Created for Lead module.

Sharpen your knife before  
you chop.

Sandbox



Customize your CRM - the way you want

## Go beyond the conventional view with 'Canvas'

Have more than just a tabular data view.

List records the way you want your customers to view, with industry's first-of-its-kind **Canvas view**.



## Customize your CRM the way you want

Home
Real Estate
Vehicles
Restaurants
Connect
Companies
Projects
...

All Vehicles

FILTER VEHICLES BY

- ☐ Activities
- ☐ Email Status
- ☐ Notes
- ☐ Profile Image
- ☐ Vehicle Name
- ☐ Color
- ☐ Vehicle Owner
- ☐ Vehicle Contact
- ☐ Car Model
- ☐ Registration Number
- ☐ Engine Number
- ☐ Email
- ☐ Car Service Amount
- ☐ Last Service Date
- ☐ Chassis Number
- ☐ Checkbox 1
- ☐ Created By
- ☐ Created by ID
- ☐ Created Date
- ☐ Device Identification Number
- ☐ Device Type

View: Car

Vintage Cars

### Classic Black Rose Luxury British Saloon Car

Year: 1966 | KMs Driven: Unknown | Fuel: Petrol | Owner: 1<sup>st</sup>

Bizzey & Sons | Austin, Texas | 404-293-6404 | reach@bizzey.com

\$32,000  
Posted on : 25 Jan

Associate Buyers  
Interested Buyers : 4

Motor Sports

### Ferrari 250 GT California Spyder SWB

Year: 1962 | KMs Driven: Unknown | Fuel: Petrol | Owner: 3<sup>rd</sup>

Wheel Yakitri | Austin, Texas | 915-737-7785 | dropmail@wheelyakitri.com

\$21,000  
Posted on : 29 Mar

Associate Buyers  
Interested Buyers : 12

Bus / Van

### The Volkswagen Samba Type 2 Sunroof Deluxe

Year: 1967 | KMs Driven: Unknown | Fuel: Petrol | Owner: 7<sup>th</sup>

Bizzey & Sons | Austin, Texas | 404-293-6404 | reach@bizzey.com

\$12,500  
Posted on : Mar 12

Associate Buyers  
Interested Buyers : 42

Vintage Cars

### Alfa Romeo 8C 2900B Touring Berlinetta 1930s

Year: 1932 | KMs Driven: Unknown | Fuel: Petrol | Owner: 4<sup>th</sup>

Trudoo Cars | Silver Spring, Maryland | 386-518-9453 | contact@trudoo cars.com

\$24,600  
Posted on : 01 Feb

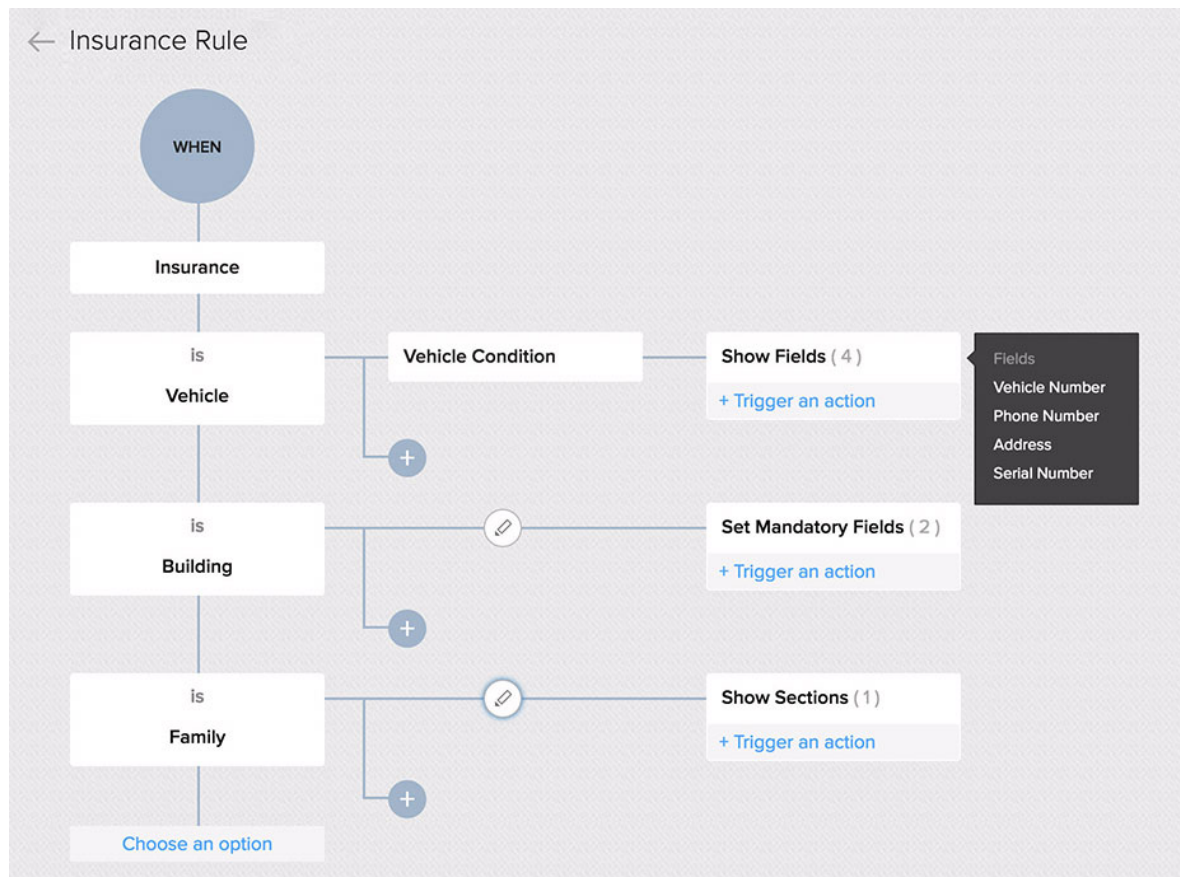
Associate Buyers  
Interested Buyers : 8

Sculpt an exclusively  
personalized view of your  
CRM records.

## Canvas



## Customize your CRM the way you want



Have multiple products at one place?

Set up conditional fields with Zoho CRM, making lives easier for both the user and your sales team.

Conditional  
Fields



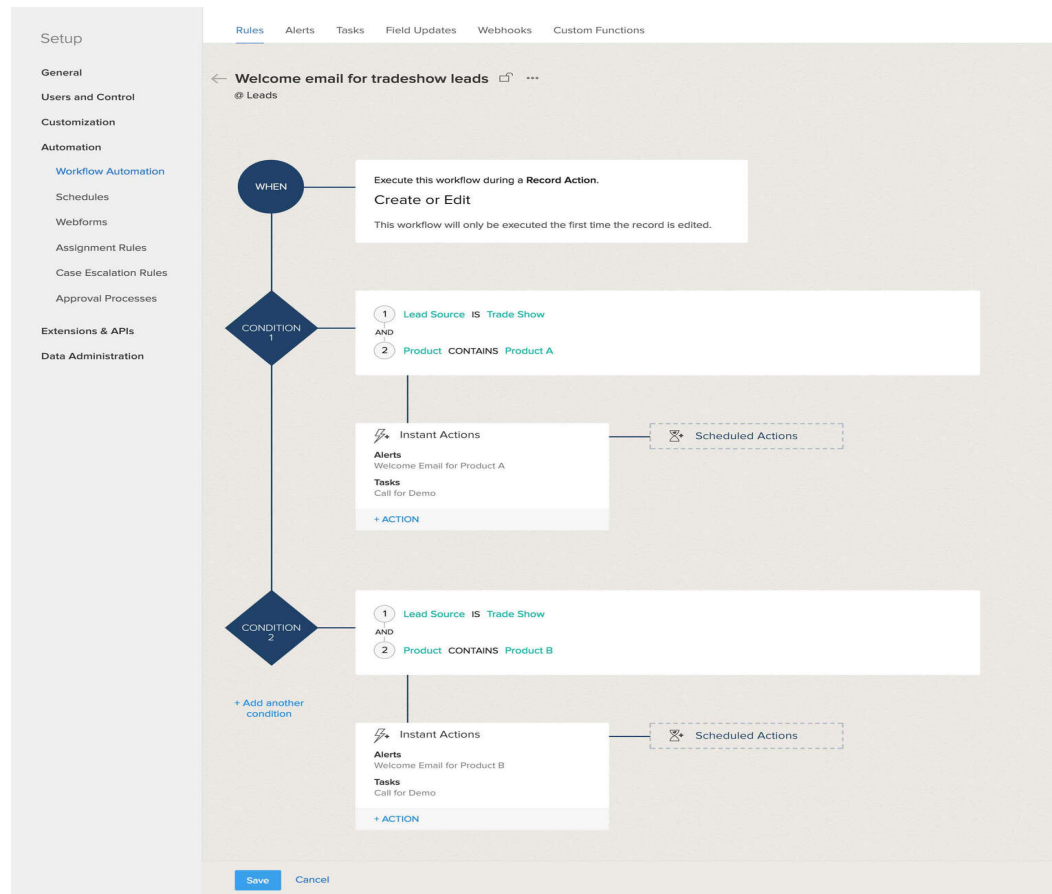
## Sales Automation

Improve the efficiency and save time of your sales team by  
**automating routine day to day tasks.**

Create advanced workflow automation from sending  
automated emails to following up with leads.



# Sales Automation



Set up to 10 conditions  
for a single rule,  
increasing your  
productivity 10x.

Workflow  
Automation



# BI and Analytics: Make intelligent decisions

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- **Reports** - Advanced reporting lets you build custom reports using the summary, tabular, or matrix views.
- **Organize and Share** your reports to multiple people across your organization. Publish them publicly.
- **Dashboards** - Add sales performance charts, marketing campaign reports, or engagement analytics to your customized dashboard.





## Dashboards

+ Add

### Favorites

Lead Dashboards

Account and Contact Dashbo...

Potential Dashboards

Campaign Dashboards

Case and Solution Dashboards

Product Dashboards

Inventory Dashboards

Territory Dashboard

Google AdWords Dashboards

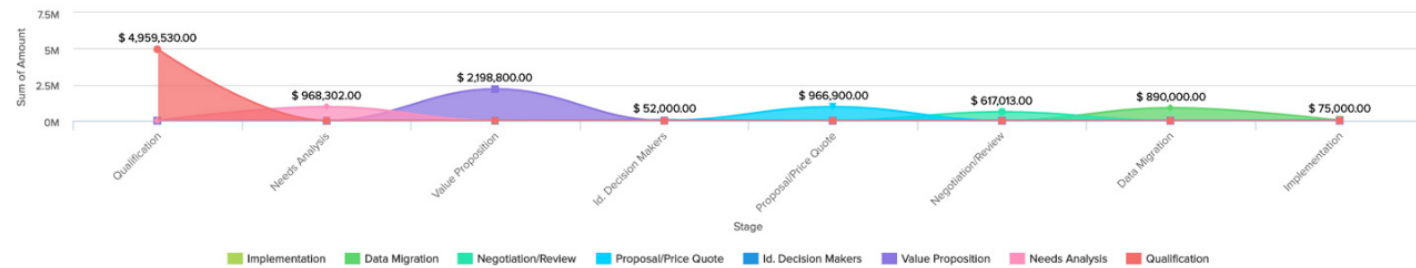
Activity

Lead by industry

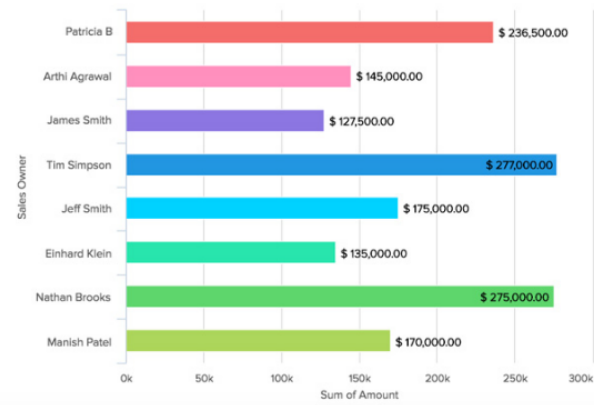
Sales by lead source

Advanced CRM Analytics

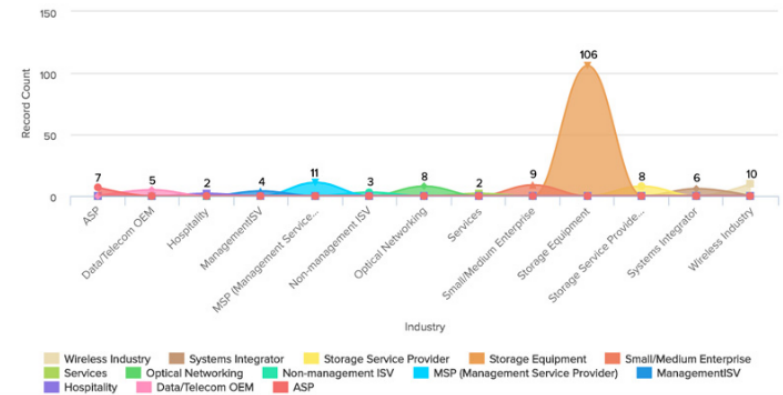
### Favorites



### ★ Deals Won Vs Sales Rep



### ★ Lead conversion % Leads by industry



## Catalyst and Developer tools



All you need is a developer to build that perfect CRM for you.

It's as simple as that.



## Catalyst and Developer tools

Why buy a new product to perform limited functions while you can **build your own functions and embed** them on top of Zoho CRM?

**Integrate your functions seamlessly** to Zoho CRM with the help of **APIs and SDK support**.



## Catalyst and Developer tools

Convert your leads and associate them to CRM accounts through any mobile, web, and voice-based applications using our **dedicated lead conversion API**.

**Write new functions** on top of Zoho CRM's existing features and **use it all in one place**.



# Catalyst and Developer tools

The screenshot displays the Zoho CRM interface. The top navigation bar includes tabs for Home, SalesInbox, Feeds, Leads, Projects, Accounts, Contacts, Deals, Activities, and Reports. A search bar and notification icons are on the right. The left sidebar contains a menu with 'Info', 'Timeline', 'RELATED LIST', 'Zillow Property Info', 'LINKS', and 'Initiate Refund'. The main content area shows a lead profile for 'Mr. Felix Hirpara - Chapman OX'. The profile includes a back arrow, a profile picture, and an 'Add Tags' button. Below the profile name, there are fields for 'Lead Owner' (Amelia Burrows), 'Email' (Felix-hirpara@cox.net), 'Phone' (202-555-0191), 'Mobile' ((717) 469-9327), and 'Lead Status' (Attempted to Contact). A 'SHOW DETAILS' link is visible. Below the profile information, a 'Zillow Listings' widget is embedded. The widget has tabs for 'Property Details', 'Zestimate', 'Comparable Homes', and 'Map'. The 'Property Details' tab is active, showing the address '1533 Ballinger St, Pittsburgh PA 15210' and '3 beds, 2.5 baths, 1491 sqft'. It also lists 'Facts' such as 'Lot: 10000', 'Type: SingleFamily', 'Year Built: 1950', and 'Total Views: 0'. A 'Zillow Search' link is in the top right of the widget. A 'Pictures' section shows a kitchen image with wooden cabinets and a stove.

A custom third party  
widget embedded right  
inside Zoho CRM

Catalyst



## Zia - Artificial Intelligence

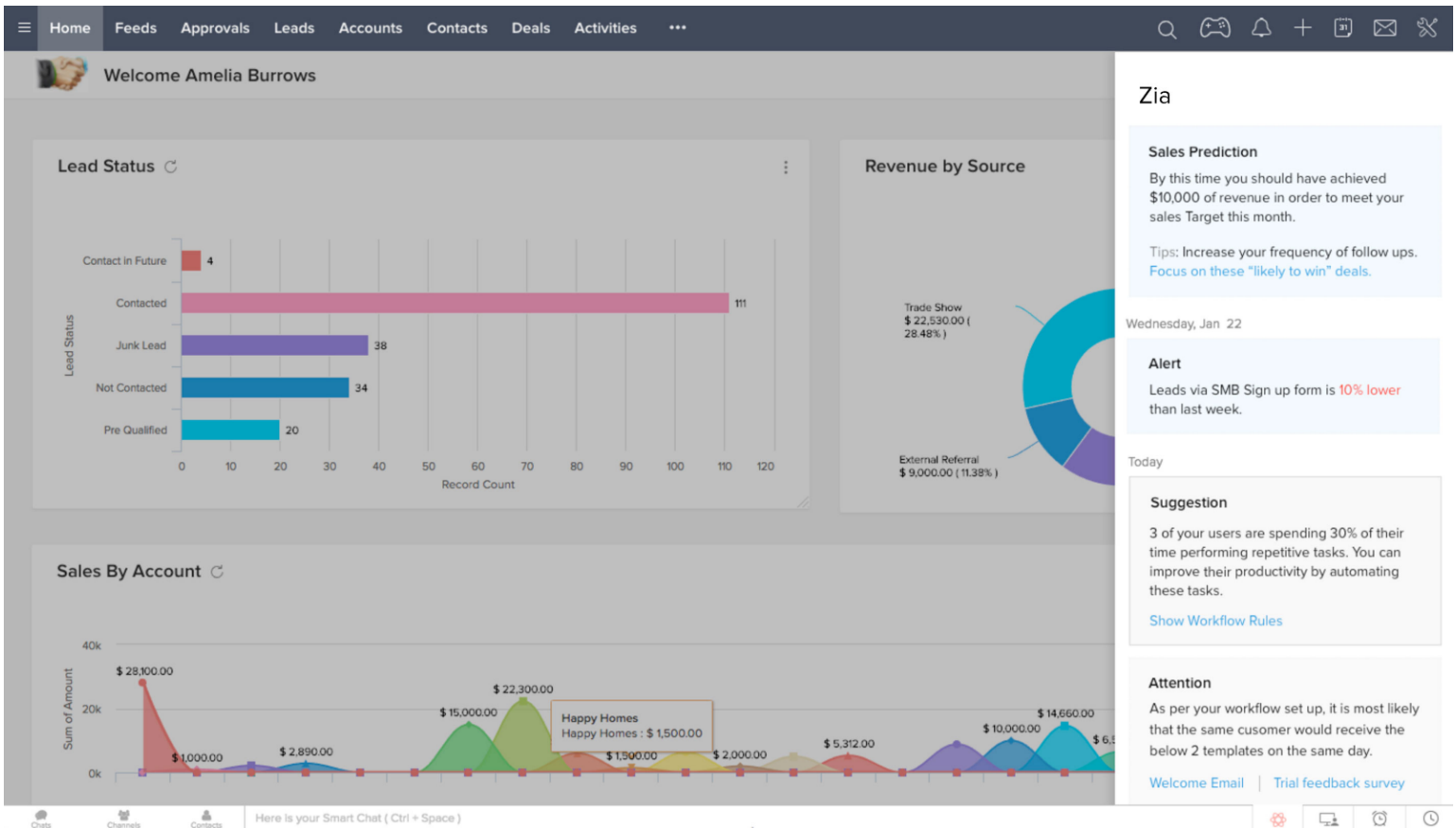
In the middle of a meeting and **need a quick report** ?  
You have **Zia for the rescue**.  
Just ask her.

Know the **best time to contact your customer**, thanks to the  
advanced artificial intelligence of Zia.

Zia's **deal/lead prediction** compares with your usual win  
pattern, making lives easier for the sales reps.



# Zia - Artificial Intelligence



You're never stranded. Zia's alert panel actively keeps track of your target.

Zia



# Zia - Artificial Intelligence

The screenshot displays the Zoho CRM interface. On the left, a sidebar titled 'CONTACTS & LEADS' lists several contacts: Jeremy Watson, Maria Thomas, Sandra Evans, Warren Hastings, James Carter, John Dykes, and Brad Smith. The main area shows an email conversation with Maria Thomas (mariathomas@gmail.com) to amelia.burrows@zylker.com. The email content is: 'Joy, this is something i need to escalate with Usman. I'm sure we were the ones who created the agent's Gmail accounts. There were some severe issues in sending out emails this morning. Please advise, Maria Thomas'. A sentiment analysis overlay is present, indicating the sentiment is 'Negative'. At the bottom, a confirmation message asks: 'The sentiment for this email is marked as Negative. Is that correct?' with 'Yes' and 'No' buttons. A 'Zoho' logo is visible at the bottom center of the interface.

Zia analyzes your emails and lets you read your customer's mind.

Email Sentiment





# Zia - Artificial Intelligence

Home Feeds Approvals Leads Accounts Contacts Deals Activities

Welcome Amelia Burrows

Customized View Classic View

Next 7 Days + Overdue

DUE DATE	SUBJECT	PRIORITY	STATUS	RELATED TO	LEAD / CONTACT
10:00 AM	New Product Pitch	High	Not Started	60 widgets	Joe Chang
10:00 AM	POC Discussion	High	Not Started	Chart bar widgets	Jerry Foreman
10:30 AM	Follow up Call	High	Not Started	Venture Capitalists	Melinda Anderson
10:30 AM	Product Demo	High	Not Started	55 widgets for Acme	Frank Fernandez
10:30 AM	2nd Follow up	High	Not Started	Deal for 100k	Ricky Langer
10:30 AM	Meeting	High	Not Started	10 macho widgets	Kane Downey
10:30 AM	Send Letter	High	Not Started	20 Flat Hat widgets	William John
11:00 AM	Email	High	Not Started	Smith & Smith Associates	Graeme Smith
11:00 AM	Price Discussion	High	Not Started	80 widgets for Acme	Matthew Marilyn
11:00 AM	Follow up Call - Quote Sent	High	Not Started	15 Airline widgets	Shane Elliott

BEST TIME TO CONTACT

10:00 AM	11:00 AM
11:00 AM	
10:30 AM	12:00 PM
9:00 AM	11:20 AM
10:30 AM	
11:30 AM	12:30 PM 4:30 PM
1:00 PM	3:30 PM
11:00 AM	
10:30 AM	11:15 AM
11:00 AM	

Chats Channels Contacts Here is your Smart Chat (Ctrl + Space) Transition Guide

Know the best time  
to make THAT call.

Best Time to Contact



# Zia - Artificial Intelligence

The screenshot shows the Zia Data Enrichment interface. A modal window titled "Data Enrichment by Zia" is open, displaying a table of enriched data for a contact. The table has columns for Zoho CRM Fields, Value, Update status, and Enrichment Value. The data includes fields like Other Phone, Other State, Other Street, Other Zip, Twitter, Phone, Other City, and Other Country. Below the table, there are buttons for "Configure field mapping", "Cancel", and "Update Contact". The background shows the Zoho CRM interface with a sidebar menu and a contact record for "Emilia Hopkins".

ZOHO CRM FIELDS	VALUE	UPDATE	ENRICHMENT VALUE
Other Phone		<input checked="" type="checkbox"/>	0008004405
Other State		<input checked="" type="checkbox"/>	New York
Other Street		<input checked="" type="checkbox"/>	150 east 30th street New York, Ne...
Other Zip		<input checked="" type="checkbox"/>	10016
Twitter		<input checked="" type="checkbox"/>	vamotravel
Phone		<input checked="" type="checkbox"/>	9732714833
Other City		<input checked="" type="checkbox"/>	New York
Other Country		<input checked="" type="checkbox"/>	USA

Buttons: [Configure field mapping](#), [Cancel](#), [Update Contact](#)

Don't worry about  
incorrect or  
incomplete data.

Data Enrichment by  
Zia keeps your data  
up to date.

Data Enrichment



## Zoho Marketplace

Zoho Marketplace - The one stop destination for your extensions

Your business might require a number of tools to perform specific actions, which you wouldn't find integrated within the CRM.

Zoho Marketplace **helps you find extensions that you need**, to make you perform the same task **right inside Zoho CRM**.



# Zoho Marketplace

## Zoho CRM

Extend your CRM functionality to do more than what it could originally.



Foneco  
★★★★★ (34)



SMS Magic  
★★★★★ (54)



Organization Charts ...  
★★★★★ (14)



Burst SMS  
★★★★★ (17)



MyOperator  
★★★★★ (8)



Contactous  
★★★★★ (7)



RingOver  
★★★★★ (6)



Kanban Board  
★★★★★ (7)



# Zoho Marketplace

## Custom Apps

Use custom apps for carrying out specific activities in your organization.



ACEMA

★★★★★ (5)



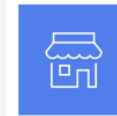
Book My Tuition

★★★★★ (1)



Schooling

★★★★★ (1)



Franchise Managem...

★★★★★ (1)



Vendor Management

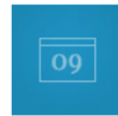
★★★★★ (1)



Google Connect

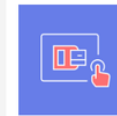
★★★★★ (1)

Install



Event Management

★★★★★ (1)



Point of Sale

★★★★★ (3)



# Zoho Marketplace

## GoToWebinar



Track leads generated from webinars and get valuable context to nurture leads.

[View More](#)

## Shopify



Keep track of your customer activities in Shopify, right from within Zoho CRM.

[View More](#)

## SendinBlue



Manage your marketing campaigns and reports from the Zoho CRM dashboard.

[View More](#)

## MailChimp



Sync leads, contacts and campaigns, and follow up on your leads with ease.

[View More](#)

## Eventbrite



Capture all your trade show and event leads, and never lose out on potential deals.

[View More](#)

## Zendesk



Get contextual information about customers with support tickets in Zendesk.

[View More](#)

and much more...



# Security and Privacy

- Our own Data Centers across the globe with 7x24x365 monitoring
- International Security Compliance - ISO/IEC 27001, SOC 2 Type II
- TLS 1.2 Encryption, SHA 256 based CA
- Geo Mirroring of customer data - For Disaster Recovery, Business Continuity
- GDPR Compliance
- Periodic and need-based Security Audits, Threat Modeling, Penetration Tests and internal audits.
- Two-factor authentication, Restricted IPs



# Dedicated data centers around the world

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# Enterprise Support

- 24x7, throughout the year
- Remote Assistance
- Dedicated Technical Account Manager
- Product Onboarding
- Quarterly report - Feature usage
- Max. Response time of 1 hour



# Enterprise CRM Training

- Get **trained by experts** from Zoho
- **In-depth** CRM Training for Administrators to **setup, configure and maintain Zoho CRM**
- Training for **Sales Managers and Sales Representatives**
- **Developer Training** - Customize and **extend your Zoho CRM** capabilities



# Thank You

