Zoho CRM

Tips, Tricks & Hacks

Alderbest Solutions

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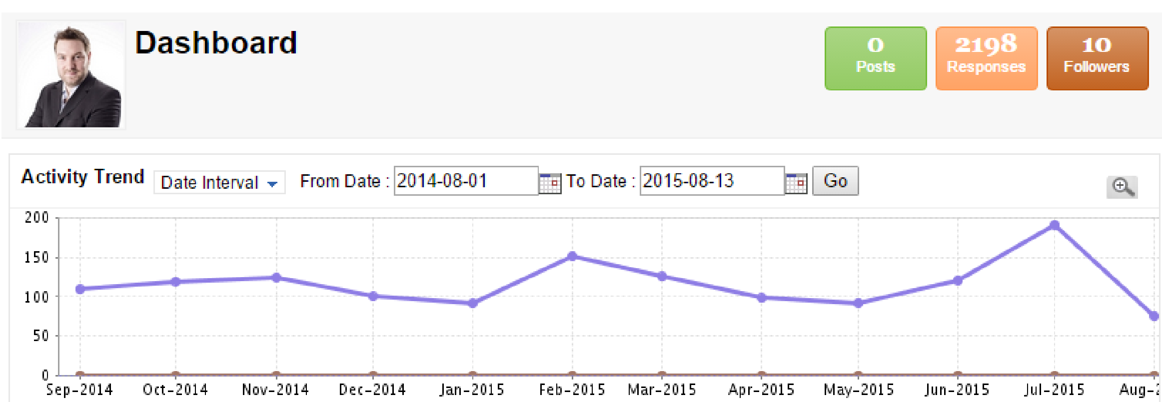
Overview

Thank you for downloading the Zoho CRM Setup Blue Print.

Alderbest Solutions was started by Michael Trow, a recognized sales, marketing and systems expert, to help small and expanding businesses navigate the complex world of CRM and related tools to improve productivity and drive revenues.

Alderbest President/ Michael Trow

We like to help. Michael is frequently seen on the Zoho Forums helping users. You can see his activity over a 12 month period below.



This guide is a result of our knowledge, experience and responses to the most commonly asked questions. We know you will be taking a *giant* leap in the right direction with your Zoho setup if you apply this information. Let's jump straight in!

Know Your Edition

It's hard to plan and define goals without knowing what you can, or cannot do in your Zoho CRM edition.

If you're using the Free edition, it's great for getting started and testing the water. However, it's extremely likely you will need features of the paid versions. At the very least, to create Custom Fields.

Visit https://www.zoho.com/crm/comparison.html to review the editions.

Compare Zoho CRM Editions Download

	FREE	STANDARD	MOST POPULAR PROFESSIONAL	ENTERPRISE	CRM PLUS
	GET STARTED	TRY NOW	TRY NOW	TRY NOW	TRY NOW
PRICING					
Monthly pricing (Billed annually)	Free for 10 users	$12 /user /month	$20 /user /month	$35 /user /month	$50 /user /month
Monthly pricing (Billed monthly)	Free for 10 users	$15 /user /month	$25 /user /month	$40 /user /month	$60 /user /month
SALES FORCE AUTOMATION					
Leads	✓	✓	✓	✓	✓
Contacts	✓	✓	✓	✓	✓
Accounts	✓	✓	✓	✓	✓
Opportunities	✓	✓	✓	✓	✓
Tasks, Events, Call Log, and Notes	✓	✓	✓	✓	✓
CRM Views	✓	✓	✓	✓	✓
Sales Forecasting	-	✓	✓	✓	✓
BCC Dropbox for email	-	-	✓	✓	✓
Macros	-	-	✓	✓	✓

Know The Modules

Some of the biggest challenges users of any CRM solution have is not knowing what information to capture and where.

Let's avoid having nasty projects down the road by starting off on the right path!

Leads – Best used for capturing and tracking 'raw data' for unqualified prospects. These records are converted and the data is transferred to Accounts, Contacts and Potentials as appropriate.

Accounts – Information pertaining to any entity. A company, an institution or a household. These are not solely 'clients'. Track Prospects, Partners, Customers and more as needed.

Contacts – The people associate with an Account.

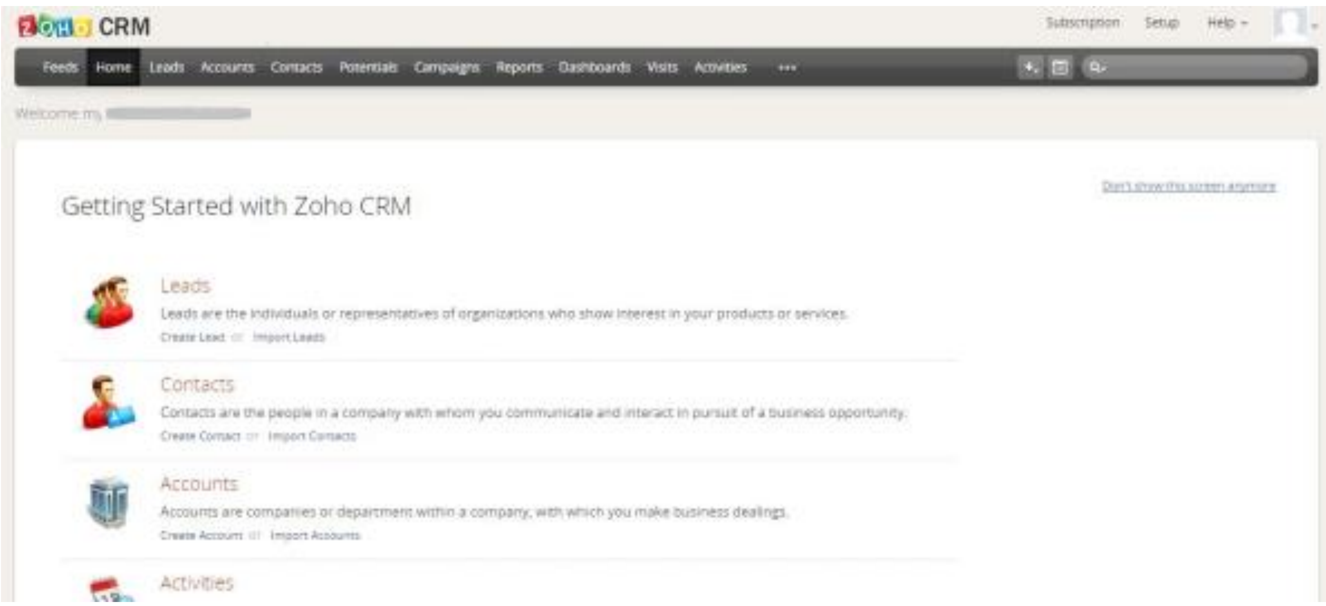
Potentials – The revenue opportunity associated with an Account or Contact.

! We've only focused on what we call the 'core modules' here. These are the most commonly adopted. You don't have to use all of the Modules. We do recommend it though as there is functionality that you may lose by not using them.

Start Here!

The first suggestion is to change what you see when you log in.

You will be pushed to a Getting Started page.



Click “Don’t Show Me This Any More” and you will see your home page.

Every User will need to do this also!

The amount of users we’ve seen that never changed this is more than you would think!

You can access everything you need moving forward from the “Setup” link at the top of the page. The Getting Started page encourages you to start with customizing Leads. That’s not our recommendation.

Text Is The Enemy

Success with CRM is largely seen from consistency and standardization.

Text Fields mean inconsistent data. Use Pick Lists where possible or the most appropriate Field Type.

Field Type	Other Details
Text	Length: Maximum 255 characters are allowed.
Integer	Length: Maximum 9 digits are allowed.
Decimal	Length: Maximum 16 digits (including decimal places) are allowed.
Percent	Label: Specify the field name
Currency	Length: Maximum 16 digits are allowed. **Rounding Option**: Specify the rounding option **Decimal Places**: Specify the number of decimal places Precision: Specify the rounding precision
Date	Format: YYYY/MM/DD Note:Date format will be changed according to user's time zone settings.
Date & Time	Format: YYYY/MM/DD HH:MM Note:Date format will be changed according to user's time zone settings.
Email	Specify a valid email address
Phone	Specify a valid phone number
Pick list	Pick List Values: Specify the pick list values
Multi-select Pick list	Pick List Values: Specify the pick list values
URL	-
Text Area	Specify the Character limit: Small is 2000 characters, Large is 32000 characters. Text Area Large will not be available while adding criteria in any feature. Both Text Area Large and Small cannot be used for sorting records in ascending or descending order.
Checkbox	-
Auto Number	Prefix: Specify the prefix of the auto-number sequence Starting Number: Specify the starting number of the sequence Suffix: Specify the suffix of the auto-number sequence Existing Records: Select the checkbox to apply auto-number to existing records.
Lookup	Lookup Type: Select the module for which you like to establish relationship Related List Label: It is the name you give to the entity that will be created under the record's details. For example, Attachments, Contact Roles etc.
Long Integer	Maximum 18 characters are allowed

!

When creating Custom Fields the default is Text. Don't be fooled into thinking this is the most appropriate.

√

Create Fields in the relevant Module only. Duplicating Fields across Accounts, Contacts and Potentials means more work and high probability of inaccurate data.

Easy On The Eye

We don't want to make using Zoho a challenge or a chore. Make it easy to navigate and easy on the eye.

<u>Sections</u> – Edit each Modules page layout and group the Fields in Sections. Having relevant Fields compiled in a user friendly way will make a big difference in the users experience.

√ **Tip** – Create the Section from the Layout edit screen first. When you create new fields you will be asked which section to add it to.

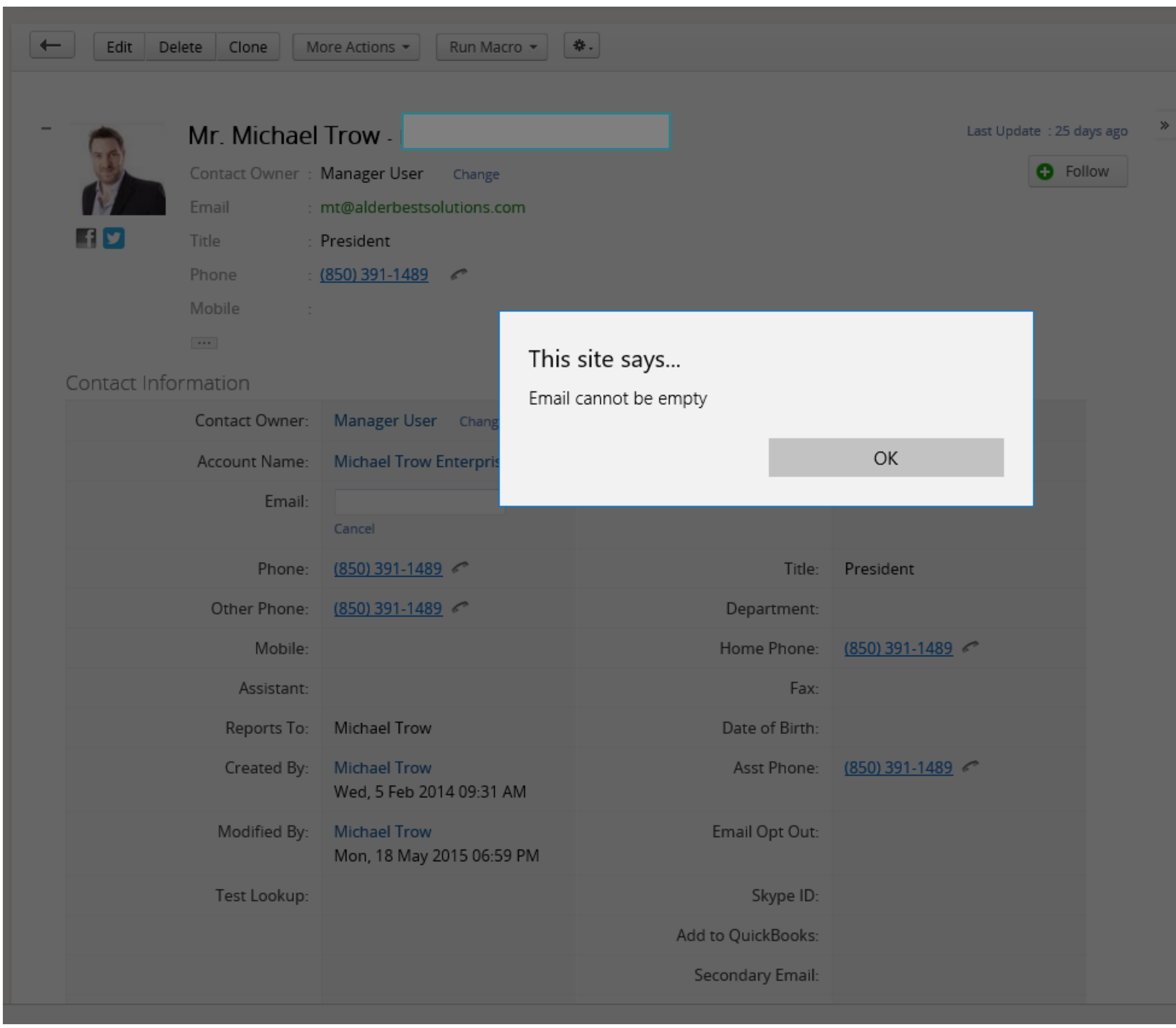
<u>Customize</u> – Add Custom Views for you and the other users to segment the data into manageable 'lists'. No one likes sorting through jumbled records.

! Related Lists – Since Zoho is built on the premise of records being associated to one another Related Lists become key to saving key strokes. What are they? They're the lists on any record page.
Customize them by clicking the settings 'gear' at the top of any record page to add the columns that will help you get the information you need quickly.

Make It Mandatory

A CRM solution is only as good as the information that's captured.

Make Fields mandatory so that records can not be created or edited without having certain information captured.



Tasks: More Than “To Do”

One of the key principals of Zoho CRM is keeping tracking activity and interactions with prospects, clients and other groups of interest to your business.

Tasks and Activities are the enabler.

- ***Last Activity*** – A number of actions will update a records Last Activity. However, using Tasks ensure you can report on records that have, or have not, been interacted with in a certain time frame

- ***Sales Will Increase***– The reason paper, and other sales tracking mechanisms fail is the number of opportunities that fall from being front of mind. Tasks keep you on top of the opportunities that matter.

√ **Tip** – Mark your Tasks as “Complete” and ensure you’re using Views that help show you only tasks that you need to action.

To Share…Or Not

Some of the biggest confusion when using a solution like Zoho comes from user permissions, in particular data sharing.

Data Sharing– By default the Data Sharing Permission for all Modules is set to Private. That means only Administrators can see all data. Otherwise, users can only see the records they own.

Roles/Groups– Roles and Groups determine which users can see which data. If data sharing is set to "public" and users share a role or group they can see the same records.

Hierarchy– In addition to Roles and Groups users in a superior Role can see data of their subordinates in a public shared data environment.

√ **Tip** – Keep it simple. Unless there are business critical reasons to keep data private between users keep things open to begin with.

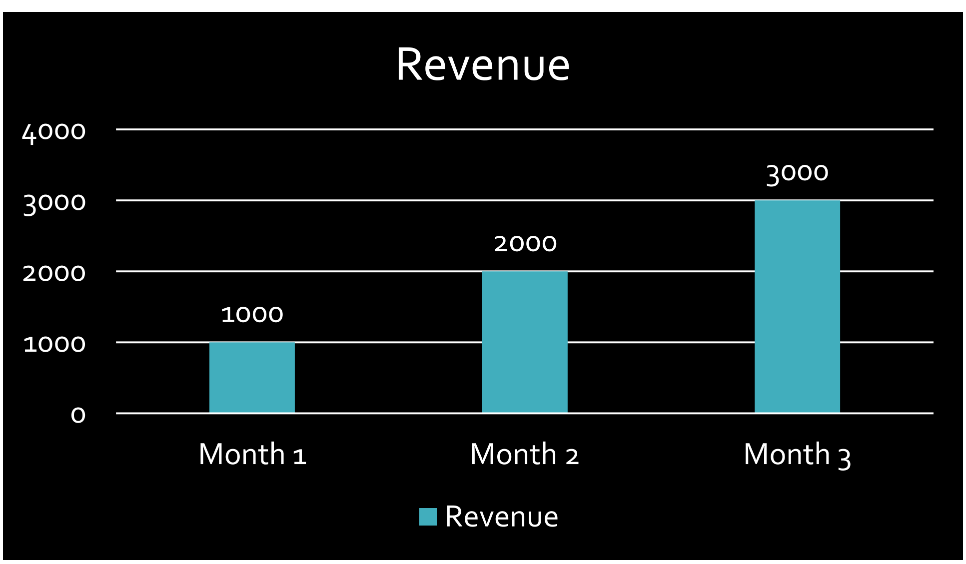
How Did We Do?

One of the greatest benefits of a CRM solution is that they give you the ability to look forward by using real time data. This means you can make educated revenue predictions and act accordingly to ensure you do everything you can to hit, or exceed, revenue targets.

However, knowing how you did is equally important.

Zoho only enables you to compile charts on Leads Created or Potentials Won by day. Not month, quarter or year or on year.

To see charts like the one below, you will need to add something.



Tip – Create a custom Formula Field to return a number based on the month given in the Lead Created and/or Potential Close Date Fields.

Before We Automate

We can't blame you for wanting to take advantage of Workflow Automation. Productivity enhancement is one of the key benefits from using Zoho.

We have a couple of suggestions.

Know The Limits – Zoho has restrictions, based on edition, as to how many workflow rules you can have active.

Define and Test– The temptation to automate is high. Having too many rules can lead to issues when errors occur as there are too many configurations in place. Define a process, test it and when it's standard look to automate.

Tip – Think about the actions you feel would benefit the most from being automated. An email to users and/or the contact? A Task? There are options so have it in the back of your mind when performing daily tasks.

Data. Be Careful!

At the end of the day, data and information is paramount to the success, or pains, you will see.

Please bear the following in mind:

Integrations– Connectivity is available. It's enticing. We urge you to think about integrating tools like Google, LinkedIn and others before doing so. For example, integrating Google Contacts can create a contact automatically in Zoho CRM. This will increase the risk of data integrity unless you think about the flow of data. Our #1 rule of thumb is; "use Zoho CRM as the data hub. Push data from Zoho to other tools but be very careful when enabling records to be created automatically."

Imports – If you are migrating or importing records from another source or file. There is a defined process to follow. Leads first. Accounts second. Then Contacts. Finally Potentials. The records need to be in Zoho CRM for the relationship to be created.

Tip – Importing data can be a challenge, even for us. You can roll back a data import (for 30 days after import) from the Data Administration section in Setup. Then you can import the records again.

And next…

There's too many to include!

We wanted to share our top tips, tricks and hacks. There is, as you can imagine, enough to probably create an encyclopedia. Not exactly quick, digestible, reading!

A lot of the areas we could cover are likely to be specific to you and your needs.

Schedule a call – We're happy to have a call to answer your questions. No cost. No obligation. You can book a time here.

Don't Have a Zoho Account?

√ You can get a Free for life account and/or a trial of the paid editions here.