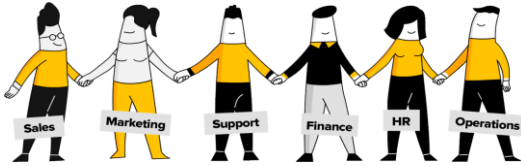




Zoho CRM for Sales Force Automation by Zoho One

Presented by... AQUAORANGE SOFTWARE CO., LTD. (HEAD OFFICE)



Zoho One is an enterprise-grade SaaS Internet-based software that includes over 40 apps available in Zoho, which is equivalent to purchasing an operating system for a business. Zoho has over 50 million users in more than 180 countries around the world.

Zoho One is highly flexible and can be customized to suit individual use according to the company's relationship with its customers. Companies can get started with Zoho's CRM system first and then gradually.

Expandable to other Zoho apps or services. In exposure to Zoho Platform, users may start using Zoho apps which can be integrated with other platforms such as G-Suite, Microsoft 365, Microsoft Dynamics 365 Business Central (NAV), AX, F&O ,SAP, Oracle Lazada, Shopee and other applications.



The Operation System for Business
ระบบปฏิบัติการสำหรับธุรกิจ

Sales interactions with customers are constantly evolving. More and more customers interact with pre-sales, sales and after-sales departments. The customer purchase experience goes beyond CRM and beyond Customer Service, and all of these interactions need to be flexibly adaptable. The software of Zoho One allows users to customize to suit their usage according to their needs. and according to the conditions according to sales activities

When the software in use can connect to the work of all. department together The user experience is unified. This unified user experience can only be obtained by using Zoho One. Departments can often work faster and more efficiently. Collaboration takes place proactively when information It's shared widely across apps across all departments. Zoho takes a proactive approach to developing the Customer Experience Platform, which works better than waiting for a bad customer experience to develop.

Zoho One Fully Integrated (End to End for Business Solution)

Zoho One is a complete, modular business management suite to help organizations of all sizes. Every business can manage sales, marketing, finance, issuing contracts, project management after sales service Human Resources (HR) and others. Features such as

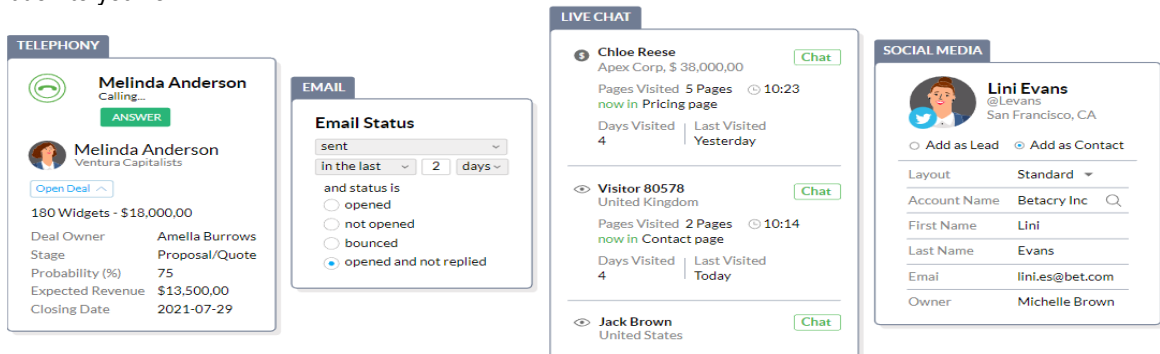
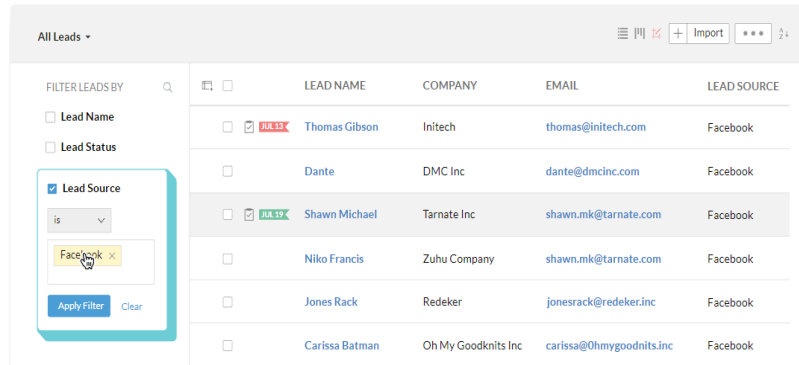
Zoho CRM

Sales Force Automation

Lead Management

Capture leads, automate lead scoring, identify leads that will convert, and follow up with detailed contact information.

- Lead management Generate, organize, and manage leads with ease** Don't get bogged down by the sheer number of leads in your system. Use Zoho CRM to automate lead generation from multiple sources, like websites, chats, social media, and trade shows. With lead scoring, distribute lead them to the right reps and ensure you don't miss out on converting quality leads.
- Nature more leads through omnichannel communication** Don't just engage through email, make full use of Zoho CRM's omnichannel communication mediums to connect with your leads. Nurture leads through social media, telephone, live chat, and even in person. If webinars are your thing, you can integrate Zoho CRM with a host of popular online webinar hosting products and conduct lead nurturing webinars online and sync all your webinar related information to your CRM.



Deal Management

Close more deals in less time. Track what stage your deals are currently in and seize every opportunity at the optimal moment.

- Know where every deal stands, at a glance** Having a close eye on your deals is easier when you can see the deal stage as well as the numbers associated with it in a single screen. Know how much of your expected revenue is near closing, and which deals need immediate attention. Use Zoho CRM's advanced filters and sort functionality to quickly locate deals that fit your criteria so that you can take quick actions on them.

ID. DECISION MAKERS - 90%	PROPOSAL/PRICE QUOTE	NEGOTIATION/REVIEW - 90%	CLOSED WON
\$ 308,000.00 - 4 Deals	\$ 84,500.00	\$ 1,130,000.00 - 4 Deals	\$ 629,000.00
700 widgets \$100,000.00 Oct 20 Snow White Bakers	75 widgets \$75,000.00 Aug 15 Tony and Presscott Pvt Ltd	200 widgets A deal \$20,000.00 Jul 30 Acme Inc	600 widgets A deal \$600,000.00 Jul 22 Optic illusions
1000 Widget A Deal \$100,000.00 Jul 22 Blue Rivers Pvt Ltd	25 widgets \$2,500.00 Jul 25 Smithson Publications	100 widgets \$10,000.00 Jul 27 Thomas Publishers	180 widgets \$6,000.00 Jul 29 Tony and Presscott Pvt Ltd
2000 widgets \$100,000.00 Jul 27 Snow White Bakers	20 widgets \$2,000.00 Jul 29 Lawson Associates	700 widgets \$1,000,000.00 Jul 23 Blue Rivers Pvt Ltd	50 widgets \$5,000.00 Jul 26 Treble Notes Inc
80 widgets \$8,000.00 Jul 24 Ventura Capitalists	10 widgets \$1,000.00 Jul 18 Homes For Sale Pvt Ltd		

- Create distinct sales pipelines for different processes** If you're dealing with multiple products or services, or you have different sales processes based on geography, a single pipeline is not adequate. Zoho CRM lets you create distinct sales pipelines that can be customized with the different stages to suit your sales process.
- Deal stages at a glance** View what stage a deal is in and update it from the same place. If you're on a call with a prospect and the deal stage moves from "needs analysis" to "value proposition", you can update it then and there.

Deal stages at a glance

what stage a deal is in and update it from the same place. If you're on a call with a prospect and the deal stage moves from "needs analysis" to "value proposition", you can update it then and there.

- Started quoting from within CRM** Sending quotes to your customers shouldn't be a hassle. Create quotes the easy way from inside the Deals module. Include the most relevant product information, such as price and quantity, as well as customer data for easy record-keeping and organization. Work smarter by generating a personalized quote, and instantly email it to your customer from inside CRM.

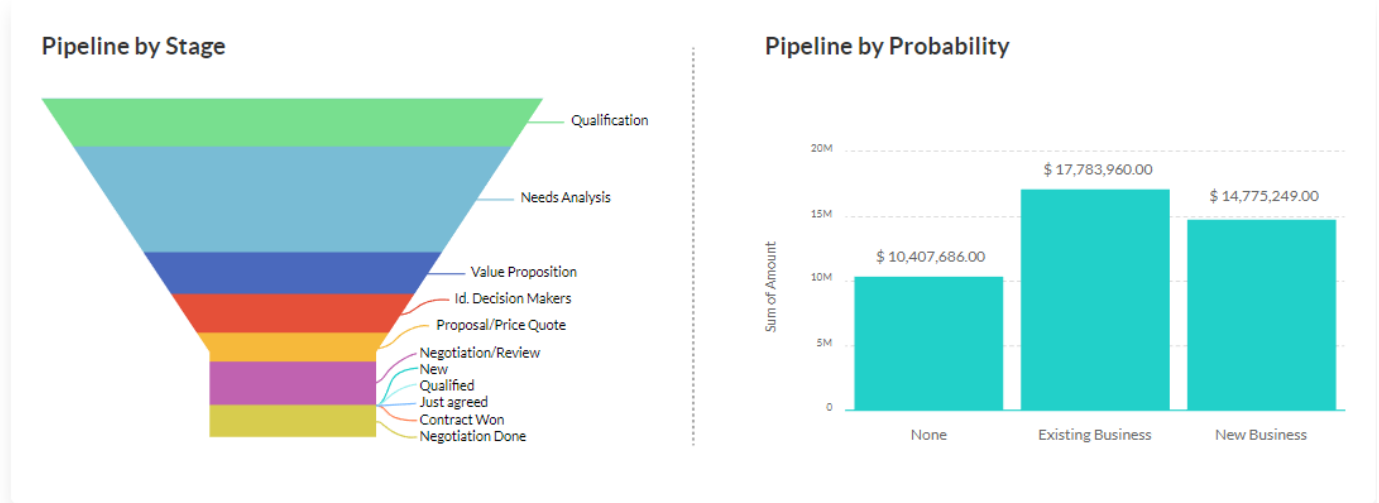
- Keep tabs on the competition** During sales follow-ups, prospects want to hear what makes your solution different from the competition. Use Zoho CRM to take notes on competitors' strengths and weaknesses, helping you pitch the advantages of your solution better and improve the chances of closing the deal faster.

#	Product Details	List Price (\$)	Quantity	Amount (\$)	Discount (\$)	Tax (\$)	Total (\$)
1	Cobblestone Tiles (TY-02-780543)	46.00	360	16,560.00	331.20	496.86	16,715.66
2	Oak Wood Panels (TY-06-674803)	180.00	120	21,600.00	0.00	0.00	21,600.00
Sub Total							\$ 38,315.66
Discount							\$ 1,149.47
Tax							\$ 557.49
Adjustment							\$ 0.00
Grand Total							\$ 37,723.68

Competitor Name	Website	Strengths	Weaknesses
WinWinTech Inc	www.winwintech.com	Priced Lesser	Quality

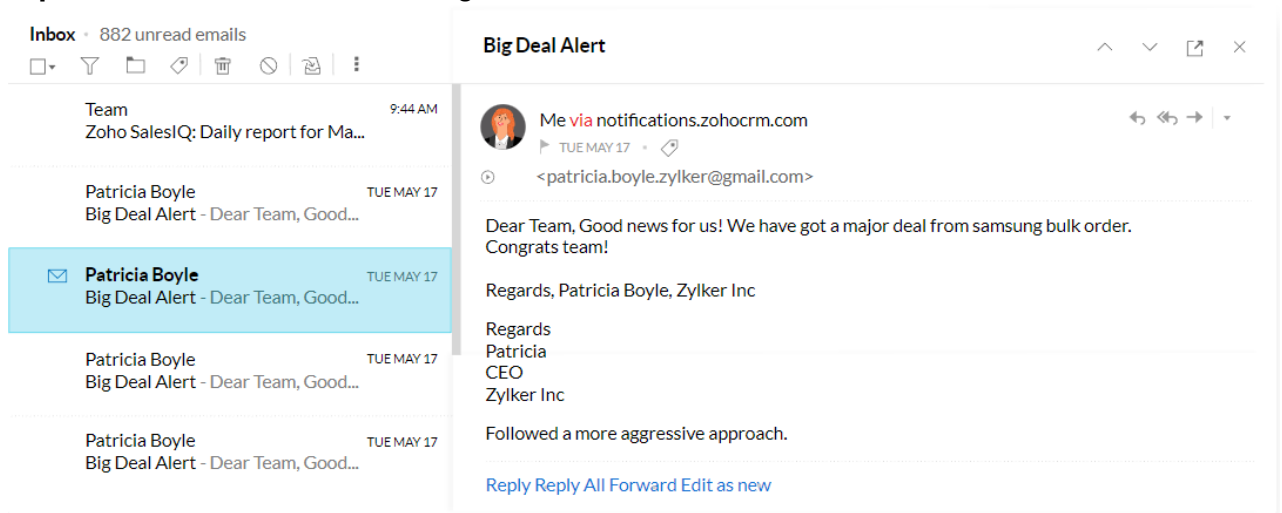
- Track your deal pipeline** View in-depth reports about deals closing this month, daily revenue, sales stages, and more. Use dashboards to identify bottlenecks in the sales process and find areas for potential growth opportunities.

Exp. Track deal pipeline report



- **Celebrate sales together** Spread the excitement of closing big deals with colleagues and managers. Set up a workflow alert from CRM to share the good news instantly.

Exp. Workflow alert to Sales Manager or Sales Team



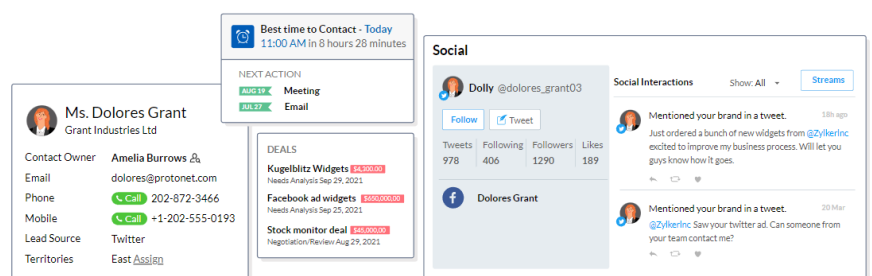
Contact Management

Foster strong customer relationships Turn your customers into brand ambassadors. With multichannel communication capabilities, Zoho CRM lets you exceed your customers expectations every time they contact you.

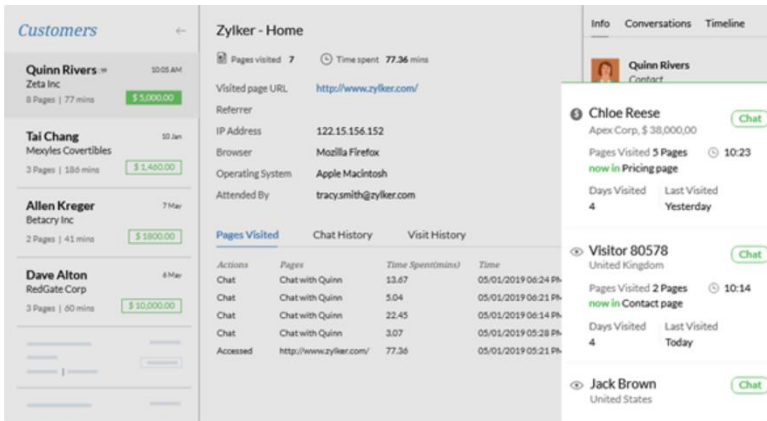
- ✓ Get real-time notifications from customers
- ✓ See a complete picture of all customer conversations
- ✓ Bridge the gap between your sales and support teams
- ✓ Support customer tickets and queries instantly
- ✓ Retain existing customers and find new ones easily

- **Communicate across channels** A customer or prospect can reach out to you in a number of ways. Respond to @mentions on Twitter, engage website visitors through live chat, call prospects, send emails, and manage all customer communication from CRM.

- Zoho makes it easy to track customer interaction, whether that is via telephone, live chat, email, social media or even snail mail. You will never lose track of your customer communications with Zoho because it will send you real-time notifications whenever a customer interacts with your business by any channel.



Email, Telephony, social media, Live Chat, Webforms, Self-Service Portals, Web Conferencing, Communication Context, Team Collaboration, Realtime Notifications

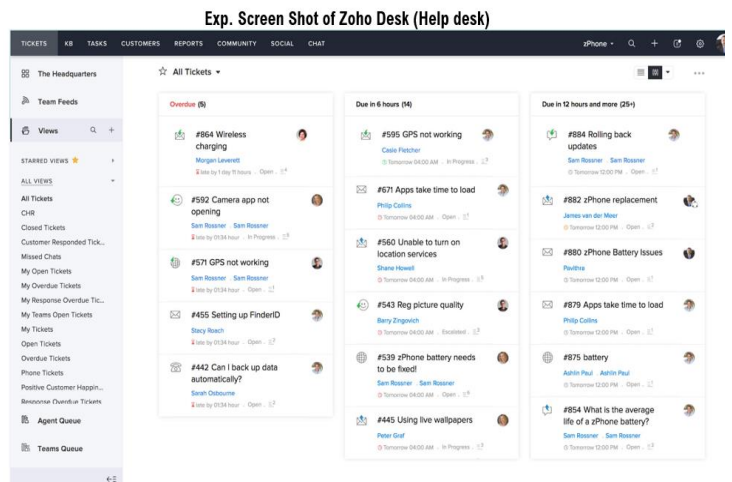


Zoho CRM streamlines team collaboration—it's just that simple. Everyone can share information, ask questions, respond, track leads, answer queries from potential customers and engage across every possible channel.

Complete customer satisfaction

Zoho CRM works seamlessly with help desk software like Zoho Desk. With two-way help desk CRM integration, all your customer tickets are synced with relevant sales data and made accessible to your customer-facing teams, allowing them to provide a consistent customer experience.

Zoho CRM integrates with your help desk software to let sales managers keep in touch with their customer, work together with support teams to close tickets, and add more value throughout the customer journey.

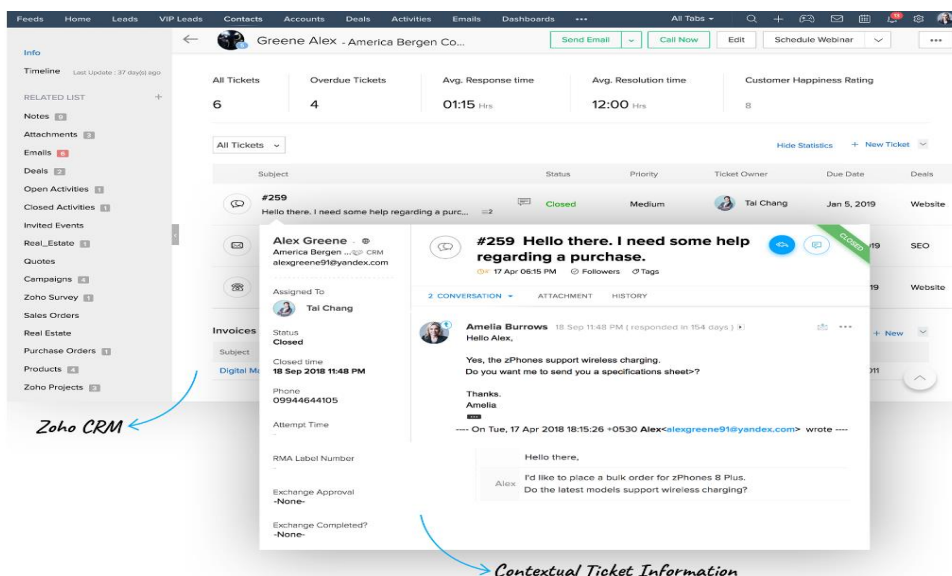


Share in delivering customer satisfaction

Securing a sale is a milestone, but not the end goal of your business. The ideal goal for any business should be to convert their customers into loyal brand advocates. This can only happen if your customer-facing teams can work together to impress the customer.

Your sales account manager needs to keep a pulse on their customers even after the sale is over and ensure that their support tickets are given the right priority.

Your support team interacts directly with their clients and understands their needs on a close level. They need to be able to pass this information to the sales team so that they can continue to offer value to the customer through cross-selling and up-selling.



Email Analytics

SUMMARIZE BY: Date | GROUP BY: Day | DATE RANGE: Last 7 Days | Filter

All Entities | All Emails | All Users

Summary Report

SENT	BOUNCED	OPENED	CLICKED	RECEIVED	RESPONDED			
63897	3.65%	2331	29.3%	18665	4.60%	2491	76160	987

Detailed Report

	SENT	BOUNCED	OPENED	CLICKED	RECEIVED	RESPONDED			
11/07/2021	2173	3.45%	75	21%	450	2.71%	48	5165	91
10/07/2021	6914	3.57%	247	22.03%	1517	3.18%	191	6313	15
09/07/2021	6305	3.73%	235	23.06%	1454	3.5%	192	5765	-
08/07/2021	8762	3.73%	327	30.07%	2597	5.12%	371	11237	382

Email, insights, and more – powered by CRM

Analytics helps you constantly refine email communication with customers. Discover the best day of the week to send out emails and campaigns by analyzing open rates and learn which templates get the most responses. Set up your preferred email in Zoho CRM and use both together.

Know when to get in touch

Whether you're contacting the customer to resolve a support query or making a sales pitch for a new cross-selling opportunity, it's important that your call gets picked up. Based on your previous interactions with customers, Zia-Zoho's AI assistant will suggest the best times to get a hold of them.

Pick the best time to make a call

You can reduce the number of unanswered sales calls with the help of Zia

My Today's Tasks | Let Zia remind you

	SUBJECT	STATUS	PRIORITY	CONTACT NAME	BEST TIME TO CONTACT
TODAY	Email	In Progress	High	Joane Lee	10:30 AM - 11:30 AM
TODAY	Meeting	Not Started	High	Lauren Cambell	09:30 PM - 09:45 AM
TODAY	Email	Waiting for input	High	Peter Gallante	09:30 AM - 12:30 PM
TODAY	Call	Not Started	High	Quinn Rivers	05:30 PM
TODAY	Email	Deferred	High	Raghav Rao	04:30 PM - 06:30 PM
TODAY	Email	Not Started	High	Martha Hills	09:30 AM

Account Management

Zoho CRM account management is the process of managing your clients, companies, or any business partners in an efficient manner by using software or a web application know as the. CRM account management helps businesses to increase productivity and profitability.

- ✓ Closely manage accounts under your control
 - ✓ Segment accounts based on recency, frequency, and monetary value
 - ✓ Identify new sales opportunities
 - ✓ Build long-term relationships with valuable accounts
 - ✓ Keep an eye on all customer communications in one place
- **See the whole picture** View all your information from a single location, including the latest customer activity, associated contacts, pending deals, ongoing projects, and more. A complete view of your account makes collaboration easy, regardless of how the business changes.
 - **Cater to different needs of the same organization** Giving your attention to each individual or department is easy when you treat them as separate accounts under the same parent account. By setting up a parent-child account relationship in CRM, you can manage daily operations and interact with decision makers in a streamlined way.

Blue Rivers Pvt Ltd

Account Owner: Amelia Burrows | Industry: Large Enterprise | Employees: 300 | Annual Revenue: \$7,000,000.00 | Phone: (202) 346-3783 | Territories: Asia

DEALS: 1000 Widget A Deal (\$1,000,000) | 700 widgets (\$1,000,000)

CONTACTS: Robert Peterkin (robert@blue-rivers.com)

Emails: Confirmation of demo session | 11:30 AM | Sent By: Amelia Burrows | Source: Individual | Status: Bounced

Open Activities: Meeting (Tasks) | Response to feedback (Calls)

Alcouva Fastening Systems

Account Information

Account Owner: Amelia Burrows | Account Name: Alcouva Fastening Systems | Account Site: HQ, California | Parent Account: Alcouva Group

Account Number: 7897 | Account Type: Distributor | Industry: Large Enterprise | Annual Revenue: \$90,000,000.00 | Created By: Amelia Burrows | Currency: USD

- One place to keep track of all your transactions** Use Zoho CRM to generate sales orders and see payment details within the account. Built-in inventory management functions allow you to generate invoices, collaborate with vendors and partners, and ultimately keep tabs on all your transactions in one place. Zoho CRM also integrates with popular accounting tools to manage your back-office operations.

Blue Rivers Pvt Ltd Edit ... < >

Account Owner: Amella Burrows

Industry: Large Enterprise

Employees: 300

Annual Revenue: \$ 7,000,000.00

Phone: (202) 346-3783

Territories: [Assign](#)

Sales Orders + New

Subject	Status	Customer No.	Due Date	Excise Duty	Sales Commission
Sales Order 1	Created	7624	Jul 22	\$1,750.00	\$1,750.00

Invoices + New

Subject	Status	Invoice Date	Due Date	Excise Duty	Sales Commission
Sales Order 1	Created	Jul 19	Jul 22	\$1,750.00	\$1,750.00

Open Activities + New Task + New Event + New Call

Subject	Activity Type	Due Date	Call Start Time	Activity Owner	Modified Time
Meeting	Tasks	Jul 19		Amella Burrows	Jul 15 06:27 AM
Response to feedback	Calls		Jul 14 03:30 PM	Amella Burrows	Jul 11 06:42 AM

- Discover key account-based insights** Get deeper insights about the accounts that you manage with Zoho CRM's built-in analytics. With a wide range of analytical components, you can quickly assess your priorities and complete tasks for important customers in a timely manner. Analytics also help you see which accounts are your most valuable, so you can assign your best team members to those accounts.

ACCOUNTS BY INDUSTRY

SALES BY ACCOUNT

ACCOUNT NAME	SUM OF AMOUNT (DEALS)
Abatz	-
Alcoa Fastening Systems	\$ 314,800.00
Amicorp	\$ 150,000.00
Angeles National Forest	\$ 176,000.00
Aria Digital Screens	\$ 400,000.00
Total	\$ 1,037,800.00

ACCOUNT NAME	DEAL NAME	CLOSING DATE	STAGE	AMOUNT
Blue Rivers Pvt Ltd (3)	1000 Widget A Deal	07/22/2016	Id. Decision Makers	\$100,000.00
	10000 Widget B	07/23/2016	Negotiation/Review	\$20,000.00
	700 widgets	07/23/2016	Id. Decision Makers	\$1,000,000.00
				\$1120,000.00
H I D Corporation (1)	40 widgets	07/28/2016	Closed Lost	\$4,000.00
				\$4,000.00
Happy Homes (1)	10 widgets	07/18/2016	Closed Won	\$1,000.00
				\$1,000.00
Lawson Associates (1)	20 widgets	07/29/2016	Proposal/Price Quote	\$2,000.00
				\$2,000.00
Smithson Publications (1)	25 widgets	07/25/2016	Proposal/Price Quote	\$2,500.00
				\$2,500.00
Snow White Bakers (1)	1000 widgets	07/27/2016	Closed Won	\$100,000.00
				\$100,000.00
Thomas Publishers (1)	100 widgets	07/20/2016	Id. Decision Makers	\$10,000.00
				\$10,000.00
Tony and Presscott Pvt Ltd (2)	60 widgets	07/26/2016	Closed Won	\$6,000.00
	75 Widgets	08/15/2016	Negotiation/Review	\$75,000.00
				\$81,000.00
Treble Notes Inc (1)	50 widgets	07/25/2016	Negotiation/Review	\$5,000.00
				\$5,000.00
Ventura Capitalists (2)	80 widgets	07/24/2016	Id. Decision Makers	\$8,000.00

Workflow Automation

Working in sales and marketing, there's little margin for missed follow-ups. Zoho CRM's workflow automation makes your business hours more productive by finishing routine tasks for you.

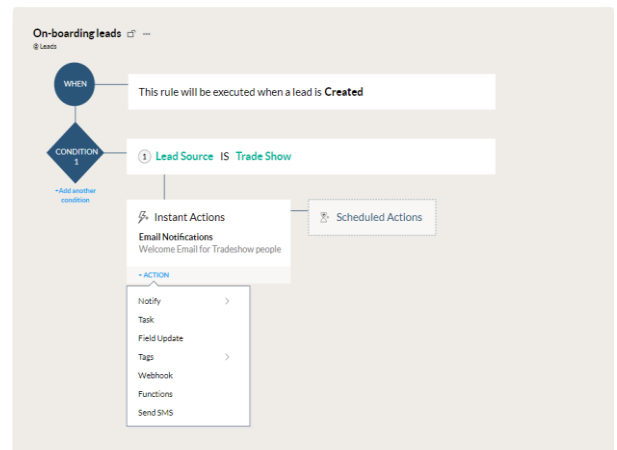
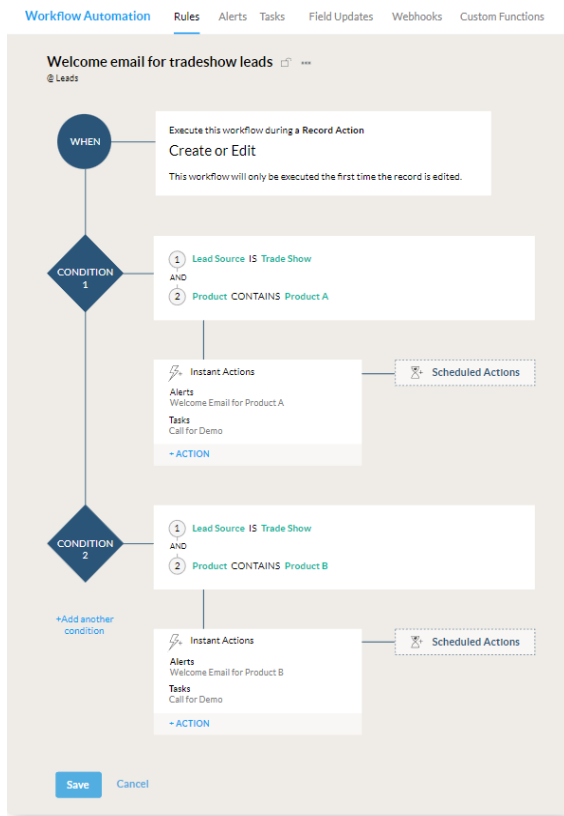
- ✓ Automate sales routines instantly or at a later date
- ✓ Analyze the performance of your workflow automation with Zia Intelligence
- ✓ Chain together multiple rules in a single workflow

- **One rule. Multiple conditions**

From sending emails to customers to following up with leads to updating required fields, there's a lot you need to do every day. Workflow rules help you get that work out of the way by automatically triggering those actions when specified conditions are met. Set up to 10 conditions for a single rule, and increase the power of a single workflow 10 times.

- **Zoho CRM follows up your way**

Performing the right actions at key stages of your sales process is crucial. Zoho CRM comes with pre-defined actions like sending emails, scheduling tasks, and updating fields that let you automate different sales routines, either instantly, or at a later date. You can also define your own custom actions through the Zoho Developer space to meet your specific business requirements, like sending personalized SMS notifications to your customers when their orders have been confirmed, dispatched or delivered.



- **Approval Process Automate submission of records for approval**

There are several instances in your business where your sales team needs approval from their senior managers—for example, pricing discount requests, contract review requests, capital expense approvals, vacation time approvals, and document approvals, Zoho CRM offers a dedicated approval management system running behind the scenes to standardize approval processes and save time by creating a dependable, repeatable system.

- **Escalation Rules Escalate cases automatically when they meet your criteria**

If cases aren't being solved quickly, Zoho CRM automatically escalates the overdue cases to the relevant manager or sales rep. You can configure a simple set of rules based on various criteria like priority, case name, or the time at which it was created to govern these actions and manage cases more efficiently.

Sales Enablement

- **Quotes and Finance Grow your money within your CRM**

Capitalize on your deals with access to the sales, expense, inventory, and subscription details of every customer in Zoho CRM thanks to the integration with Zoho Finance Suite.

- ✓ Generate auto-populated invoices with the benefits of CPQ (Configure-Price-Quote) via Sub forms.
- ✓ View order contents, status of shipments and outstanding balances.
- ✓ Compare periodic expenses with customizable dashboards.
- ✓ Get stock information that auto-adjusts with every order.
- ✓ Browse records of transaction history and subscription renewal dates.

- **Generate invoices faster to seal the deal**

Just because you mark a deal as closed doesn't make the money yours. With Zoho CRM, once a deal is accepted, it can generate an auto-populated invoice with the agreed upon terms that can be exported as a PDF and sent via email. This equips your sales team to rake in revenue immediately, before the customer reconsiders.

Construction Contract

Quote Number: 2021934000003521088
 Quote Stage: Closed Won
 Quote Owner: Amelia Burrows
 Valid Until: May 10, 2021
 Carrier: FedEx

#	Product Details	List Price (\$)	Quantity	Amount (\$)	Discount (\$)	Tax (\$)	Total (\$)
1	Cobblestone Tiles (TY-02-780543)	46.00	360	16,560.00	331.20	486.86	16,715.66
2	Oak Wood Panels (TY-06-674803)	180.00	120	21,600.00	0.00	0.00	21,600.00

Sub Total: \$38,315.66
 Discount: \$1,149.47
 Tax: \$557.49
 Adjustment: \$0.00
 Grand Total: \$37,723.68

- **Resolve customer questions with confidence**

Never let issues like old shipment addresses or a past-due payment get in the way of customer satisfaction. A simple integration with Zoho Inventory gives your sales team the information they need. Get instant access to details like order contents, status of shipments, and outstanding balances, eliminating the need to rummage through different apps or put the customer on hold.

Inventory - Zyker Widgets Inc.

New Package (SO-00001)

Package Slip#: PKG-00001
 Date: 06 May 2019

ITEM DETAILS	QUANTITY ORDERED	QUANTITY PACKED	QUANTITY TO PACK
2.0 DI	1	0	1
Cobblestone Tiles	1	0	1

FINANCE DETAILS

Total Sales: \$2,846.00
 Outstanding Receivables: \$2,000.00
 Unused Credits: \$0.00

SO-00001

PACKAGE SLIP#	SHIPMENT ORDER#	DATE	STATUS	CARRIER	TRACKING#	DATE OF SHIPMENT
PKG-00001	SHP-00002	06 May 2019	SHIPPED	FedEX	#RTG45678RTYB	06 May 2019

SALES ORDER (Sales Order# SO-00001)

Zyker Widgets Inc.
 4399 Glendale Avenue
 San Jose California 94088
 U.S.A

Bill To: Dawson Consultants
 #45 Sullivan St
 Boise 83702
 Idaho 83702
 USD

Order Date: 06 May 2019
 Ref#: EST-000001

#	Item & Description	Qty	Rate	Amount
1	2.0 DI	1.00	2,800.00	2,800.00
2	Cobblestone Tiles	1.00	46.00	46.00

- Track transactions at every stage**

Zoho CRM auto-updates the status of transactions and even allows you to manually update them depending on whether the engagement took place online or offline.

SALES ORDER

Sales Order# SO-00001

STATUS

Order	CONFIRMED
Invoice	Not Invoiced
Shipment	Pending

REFERENCE#	EST-000001
ORDER DATE	06 May 2021
SALESPERSON	Amelia Burrows

- Win your customer's loyalty the smart way**

A large portion of revenue can come from recurring subscribers. Zoho CRM seamlessly integrates with Subscriptions to empower your sales representatives with information related to a subscriber's activity at the time of negotiation. The neat breakdown of transaction history, subscription renewal dates, and invoices under each account allows sales representatives to provide customers with appropriately priced offers and discounts.

BILLING DETAILS Future

\$50.00 per month	15 May 2021 15 May 2021	18 May 2021 Activation Date	18 Sep 2021 Expiry Date
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Emailed To amy@nitrofitness.com

Plan & Addon Details	Qty	Discount	Tax	Rate	Amount
Sports Pack	1	\$0.00	\$2	\$30.00	\$32.00
Setup Fee	-	\$0	\$6	\$20.00	\$26.00
Total					\$58.00

ZOHO SUBSCRIPTIONS Subscription has been created successfully

Name	Subscription ID	Reference#	Last Billing Date	Next Billing Date	Status	Sub Total	Amount
Fitness Sports Pack	133676800000111005	#237890	09 May 2021	09 May 2021	Trial	\$00.00	\$00.00
Fitness Sports Pack	133676800000111005	#237891	09 May 2021	09 June 2021	Future	\$50.00	\$50.00

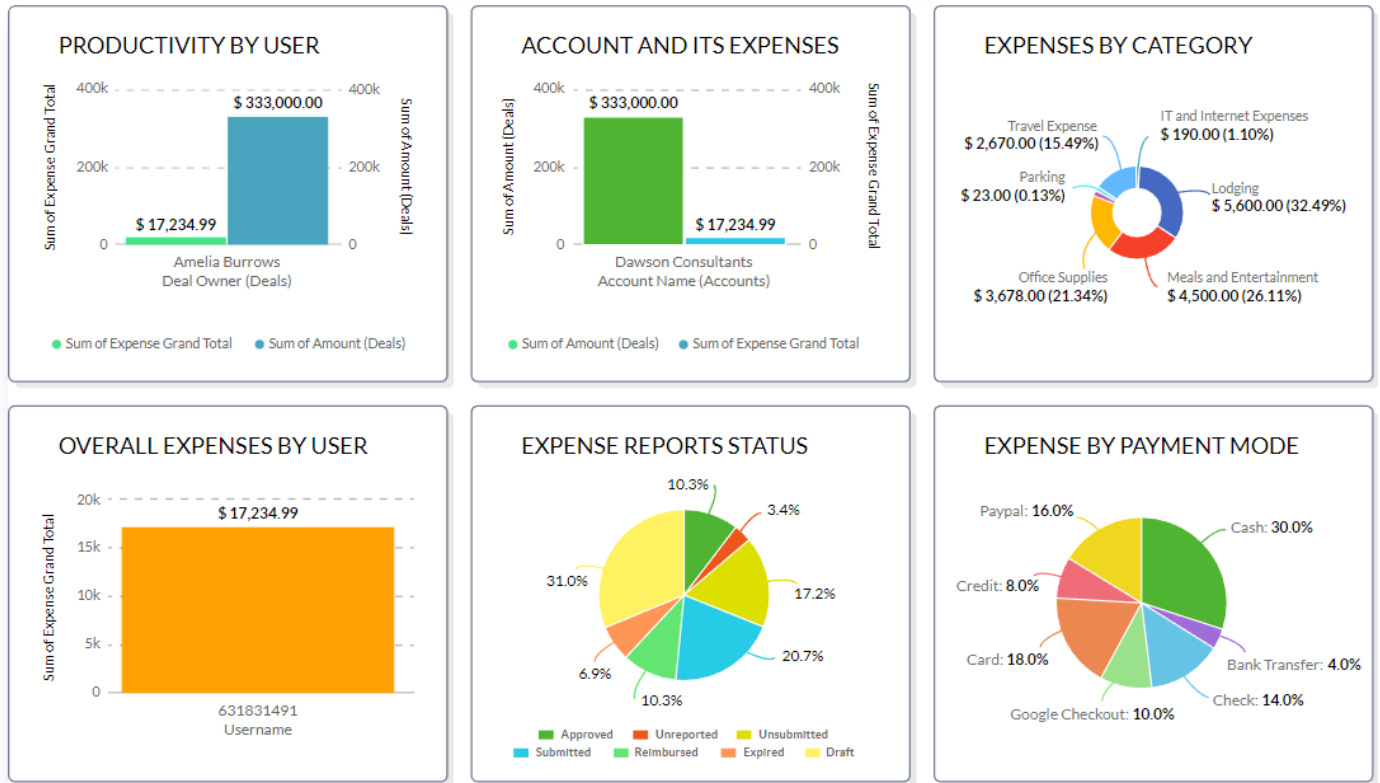
+ New Subscription < 1 to 105 >

- Submit and review your expenses the smart way**

Drag and drop bills or access your system to attach them to an expense record using Zoho CRM's Expense integration. Track whether your reimbursements are pending, approved, or rejected at any point of the review process form within Zoho CRM.

• **Educate your sales representatives to spend wisely**

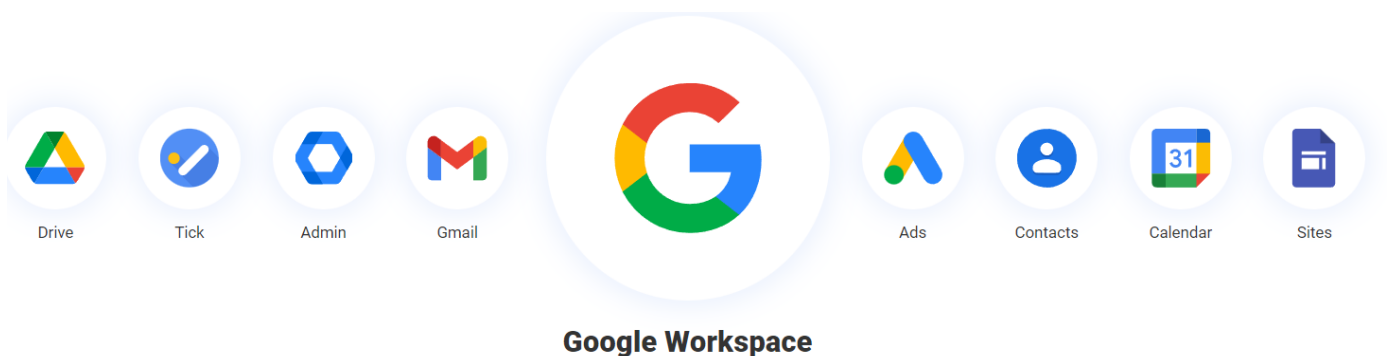
Build custom dashboards based on expense reports to inform your sales team’s future financial planning. Hone their analytical skills with constant updates on recent deal outcomes.



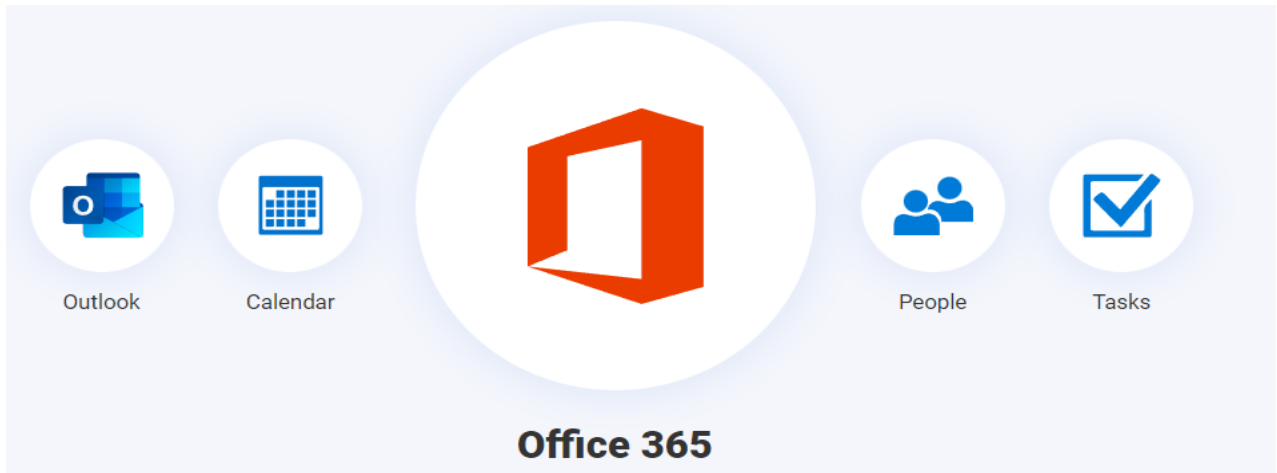
Google Workspace and Office 365 Integration

Equipped with your favorite productivity tools Experience the best of Google workspace and Microsoft 365 functionality within Zoho CRM. Stay focused on winning deals rather than shuffling between multiple applications with centralized access to features you work with on other platforms.

- **Google Workspace** Zoho CRM integrates seamlessly with Google’s offerings. Attach documents from Google Drive, export events to Google Calendar, add contacts from Google Contacts, and configure Gmail directly from within Zoho CRM. Enjoy the familiarity of Google with the efficiency of Zoho CRM.

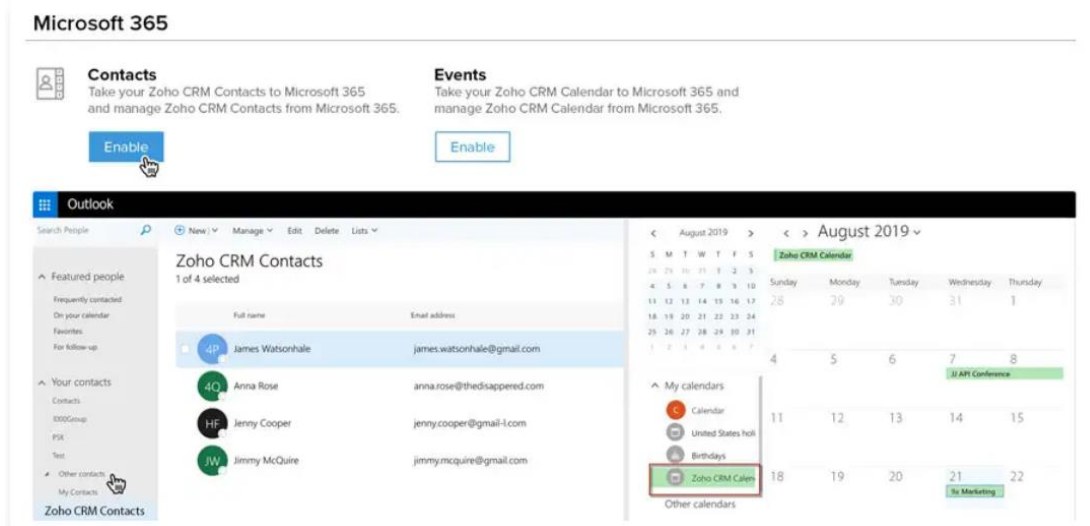


- **Microsoft 365** Zoho CRM makes data migration from Microsoft 365 hassle-free. Just install the Zoho CRM app to begin seamless data and sync your calendar and contacts in no time.
 - ✓ Create, edit, and view all your contacts, tasks, and meetings on both platforms simultaneously.
 - ✓ Bring CRM dashboards and shareable records into your Microsoft Teams account to add context to your chats.
 - ✓ Avoid the pile up of obsolete contact information and add new leads or contacts with the click of a button.



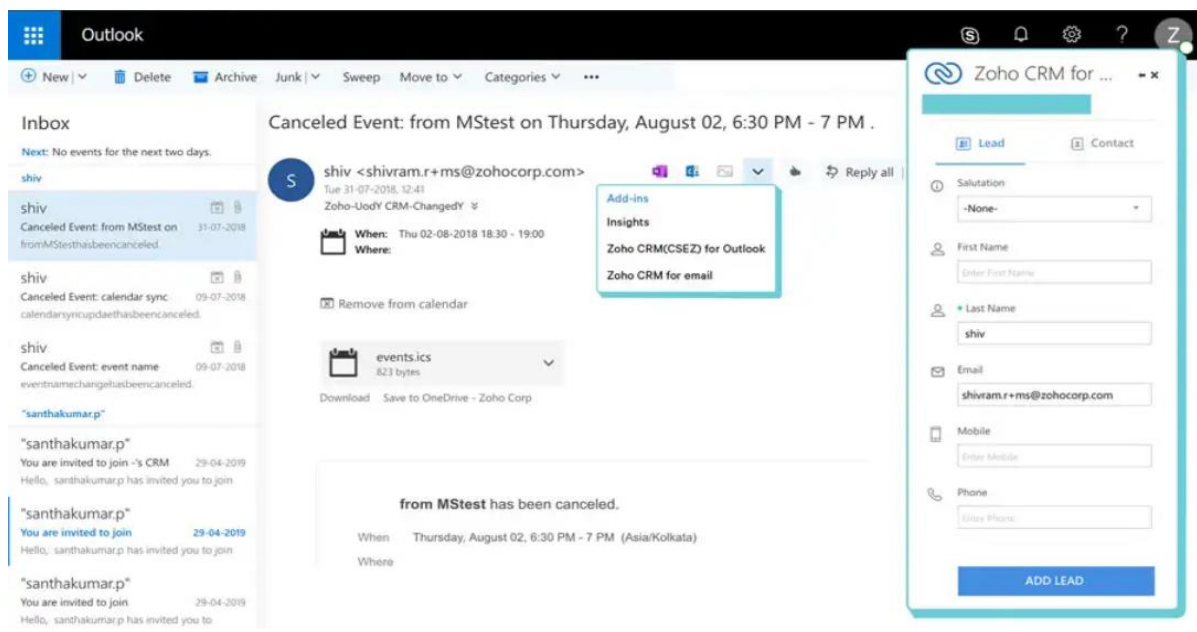
- Access and update your Contacts, Tasks, and Meetings at all times**

Customize data mapping, or auto-map data, between relevant fields in your Microsoft 365 and Zoh CRM accounts simultaneously with a simple synchronization process. Reschedule meetings, modify tasks, and update contact information on the platform of your choice.



- Add leads and contacts directly from your email**

Save time and space on both platforms to exclusively accommodate revenue-generating contacts and leads by adding them directly from your email to your Zoho CRM database.



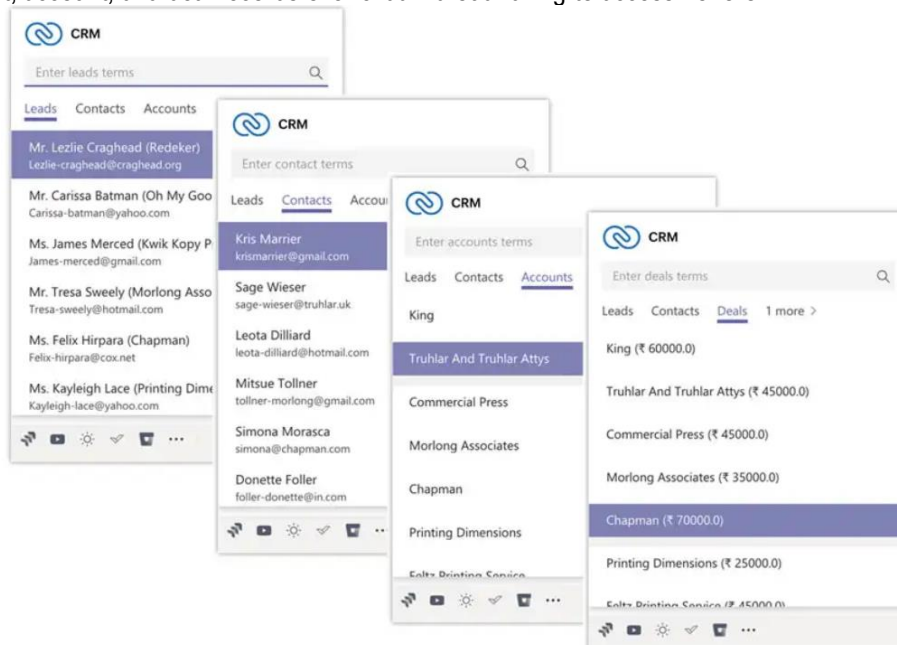
Feed your channel discussions with context

View dashboards within a tab in your Microsoft Teams account with accessible CRM data. Skip the hassle of creating presentations and make the most of your channel discussions with easy access to relevant information.



Share and access CRM records over chat

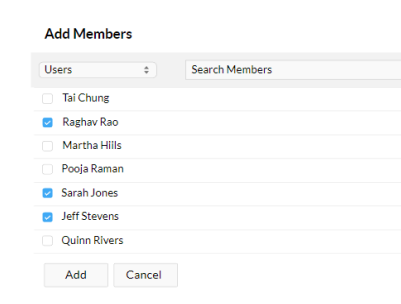
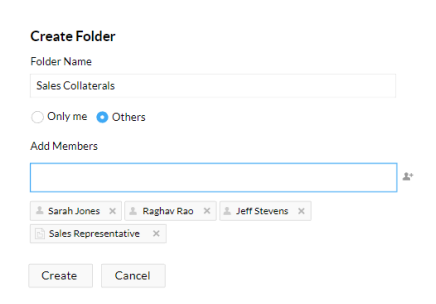
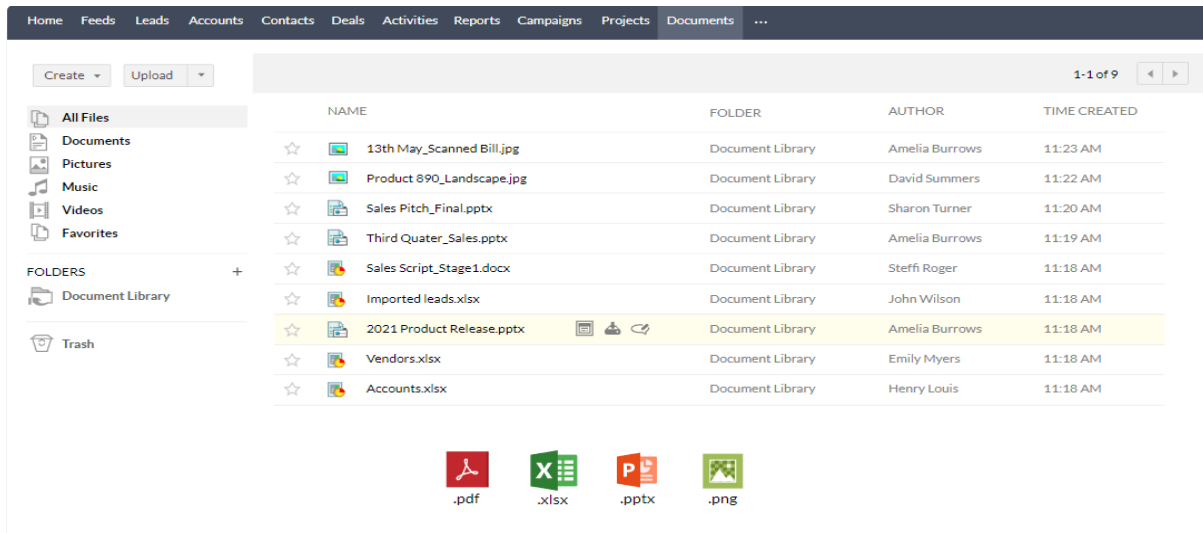
Ever wasted precious minutes during important discussions or tasks searching for information related to leads, deals, accounts, and contacts? Look no further with the message extensions feature within Microsoft Teams. Users can share CRM lead, contact, account, and deal records over chat without having to access Zoho CRM.



Invite users from Microsoft 365

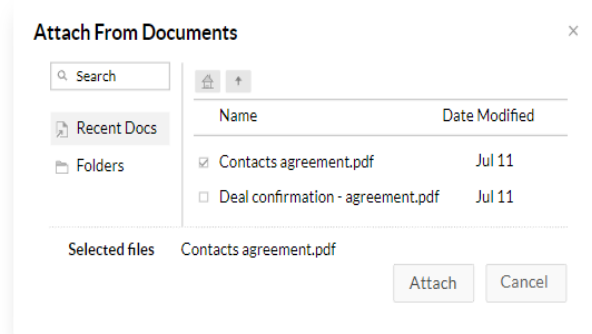
Convert your team members into Zoho CRM users with just a click. Access your Microsoft contact list within Zoho CRM and select team members you want to invite. Once a team member has accepted the invite, select their user profile role, customize permissions, and get to work in less than a minute. Likewise, an Microsoft 365 user can request the administrator to join Zoho CRM by accessing the Zoho CRM app within the Microsoft Platform.

- ✓ **Documents Library** **Easy document collaboration. Better productivity**
Host a repository of your valuable collaterals within your CRM for quick access and accelerated collaboration among teams.
 - ✓ Centralized access to sales collaterals, data sheets and other relevant documents.
 - ✓ Attach documents to leads or deals and view multiple versions of your collateral using document tabs.
 - ✓ Share documents based on role hierarchy or project necessities with teams or individuals.
- ✓ **A central library for all your sales documents** Ensure the right people have access to the right documents and associate these documents with their respective deals with a centralized repository for all your sales collaterals.

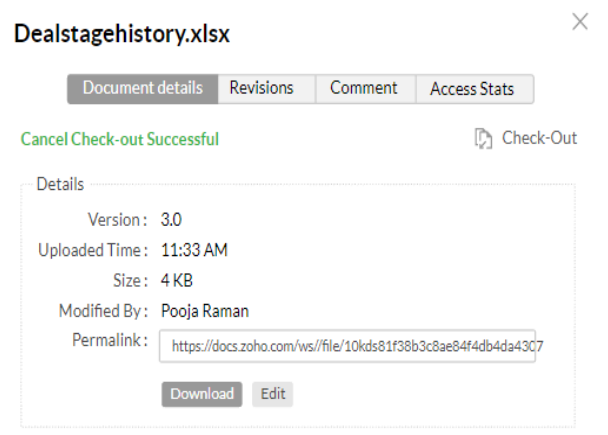


- ✓ **Share documents with the right people** Take control of your document repository by managing access privileges. Use Zoho CRM's role-based security to get content into the right hands. Give access to users based on their roles in your organization.

- ✓ **Link the right collateral with the right deal**
There is no need to dig through all your documents when you just want to send the latest sales material to your leads or contacts. The document library intelligently connects relevant collaterals with the appropriate lead or deal.



- **Multiple versions**
Have multiple versions of your sales collateral in the Documents Tab and access the latest draft of the document whenever you log in.



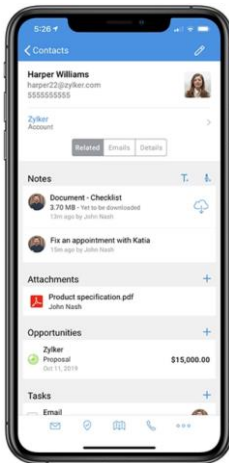
Sell On the move

Stay on top of your business anywhere you go with the Zoho CRM mobile edition Access important information, connect with clients, and make big decisions on the move.

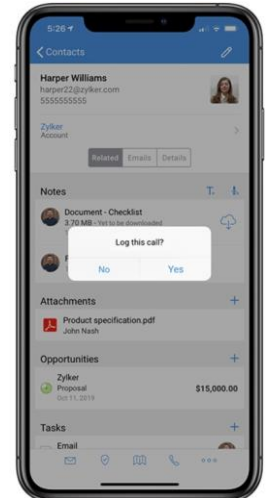
- ✓ Stay up-to-date and gain insights on key metrics and sales trends.
- ✓ Access and modify your information even when you're offline.
- ✓ Record customer visits and add voice notes and files to deals with ease.
- ✓ Log calls and schedule follow up activities.



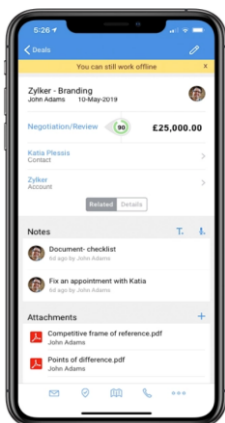
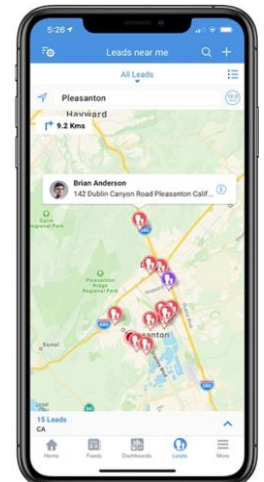
- **Seize opportunities and never let them slip through the cracks** Contact data is just a click away. When you're out at lunch and remember a contact, you've been meaning to reach out to, you'll be able to do so right away with the mobile CRM app. Lock up contact information with the powerful global search and initiate a call right away. Log calls and jot down the specifics by adding notes, or just go ahead and record voice notes and convert them to text.



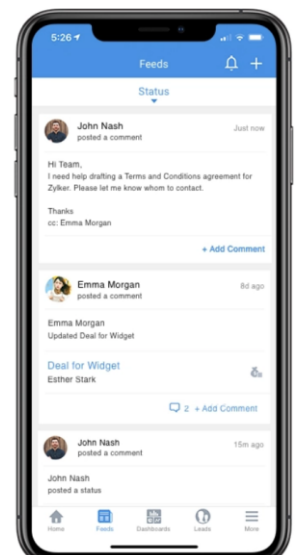
- **View all your customer activities in one place** Sales reps work some of the busiest, most deadline-driven schedules and are constantly on the move, which makes it challenging to keep track of sales activities. When all your data is easily accessible, you can get relevant customer data, deal information, and contact history necessary to make tactical sales pitches, with one quick look at your screen.



- **Get the most out of your day** When you're done with a client meeting and have some time to spare, take the opportunity to locate prospects nearby, view their organization's location on the map, access the website links, and get all the information necessary before reaching out to them. Check the most efficient sales route to navigate to your customer's location. Check in at the client's location to record your visits and maximize Selling time on the road.

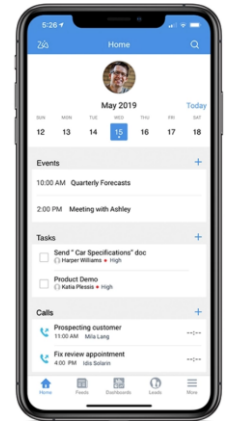


- **Work from anywhere, anytime** Say you're boarding a plane after a successful client visit and the person seated next to you shows interest in your product over a casual chat. You can quickly access your documents and briefly describe your product with impressive digital resources such as brochures, videos, power points, and so on. Zoho CRM's mobile app makes it easy to access data from anywhere, at any time. Add and modify customer information in real time, even when you're offline. Changes made offline will automatically sync across devices once you're connected to a network.






- **Collaborate on the move** Sales reps are the face of the company and every decision they make reflects on the brand of the company as a whole. With sales reps traveling to meet clients and prospects, it's hard to expect all team members to be in one location at the same time to make a collective decision. With feeds, sales managers can stay informed of their team's progress and guide them with valuable insights at crucial deal stages. Post the status of your tasks to keep them informed of your progress. View and comment on your team's posts and @-mention colleagues to bring posts to their attention.

- Stay on top of your day's activities** Plan your work day to stay on top of your day's activities. Whether it's talking to a customer, negotiating a deal, or sending out an email, get an overview of all your upcoming activities. Be well-prepared and informed, and improve your sales conversion rate. Set reminders for scheduled activities to know what's coming next, and to never let opportunities fall through the cracks.






- Work faster and smarter with Artificial Intelligence** Revolutionize the way you sell when you're on the move with Zia, our personal AI. Be it creating a record, changing the deal status, calling a customer, or adding notes, give Zia the specifics and she'll get it done for you.



Download the Zoho CRM application now.



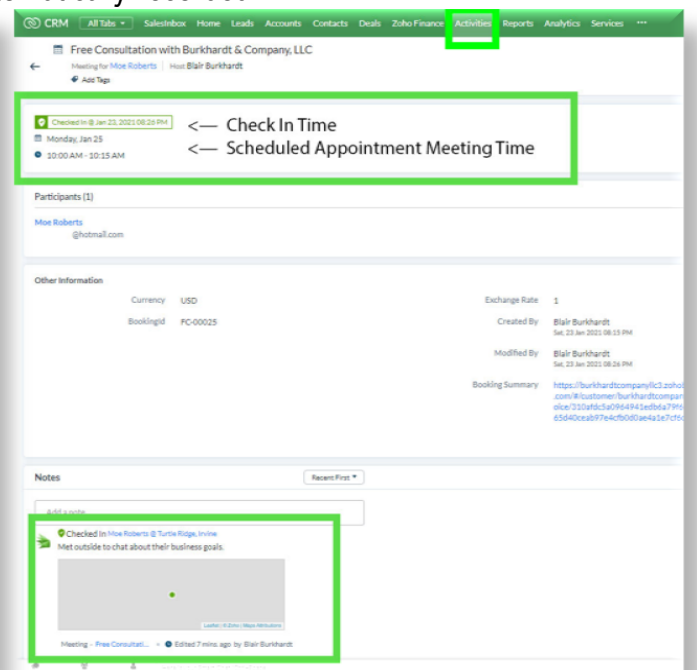
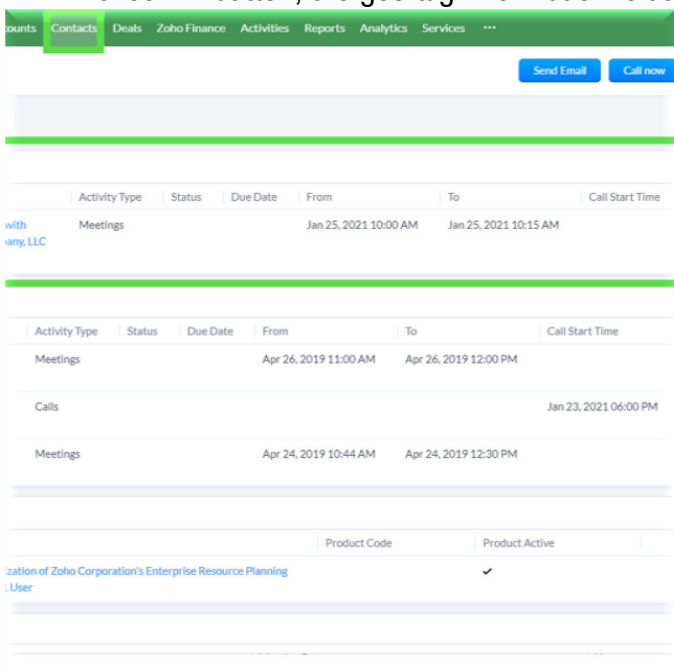
Easily digitize and save business cards to your phone whenever you attend meetings, conferences, events, or trade shows.

Mobile App for Employee Check-Ins

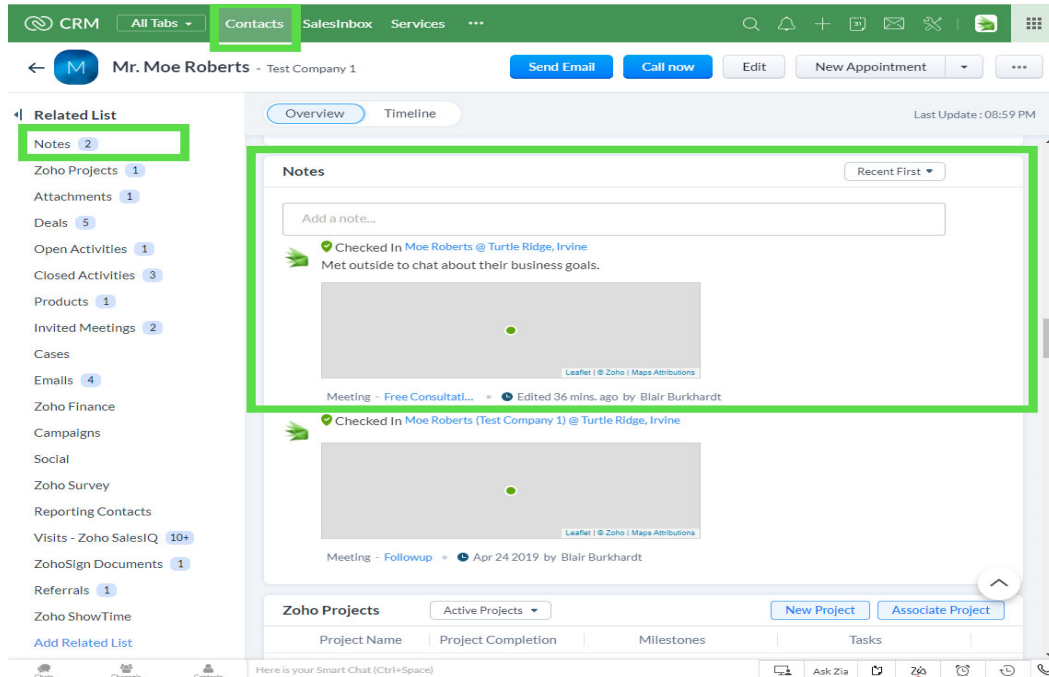
Use a CRM mobile app and have your employees check in wherever they go. Associate a mobile check in with a meeting in your CRM. Using Zoho CRM's mobile app you can quickly see your calendar, choose a meeting day and time, then check in. Set access to who can delete or edit comments on these check in events.

Get exact geo-tag coordinates (Latitude and Longitude down to 6 decimal places) where the employee clicks the check-in button. The information is automatically collected and added to the meeting's details. Generate multiple reports about check ins and filter the results according to your needs using the build in Zoho CRM Reports Module.

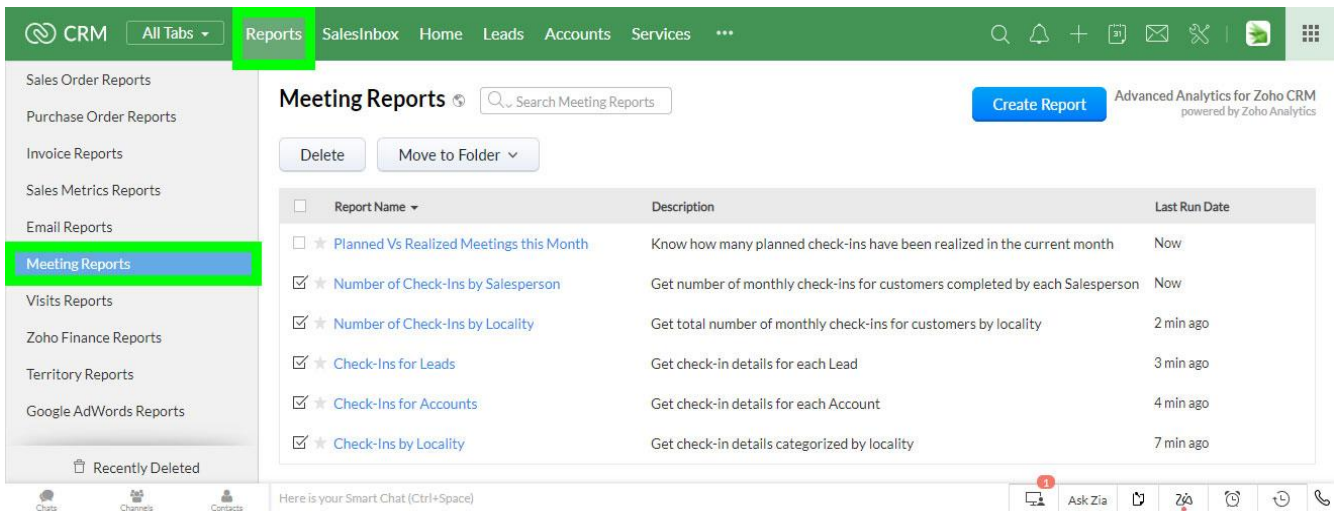
- Create A Meeting in your CRM** You can make a new activity in your Zoho CRM manually or by other methods such as a Zoho Bookings integration. Any Check Ins must be associated with a meeting in your CRM. The image below shows the Open Activities section of a particular Contact. This activity is the meeting we want to associate a mobile check-in with.
- Check-Ins Are Recorded with The Associated Lead/Contact & Meeting** After your employee hits the check-in button, the geo tag information is automatically recorded.



You can later view this check in and geo data in many ways, including viewing the Activities, Contacts, Leads, and Reports Modules.



You can later view this check in and geo data in many ways, including viewing the Activities, Contacts, Leads, and Reports Modules.



Below shows the "Check-Ins for Leads" report, generated in Zoho CRM.

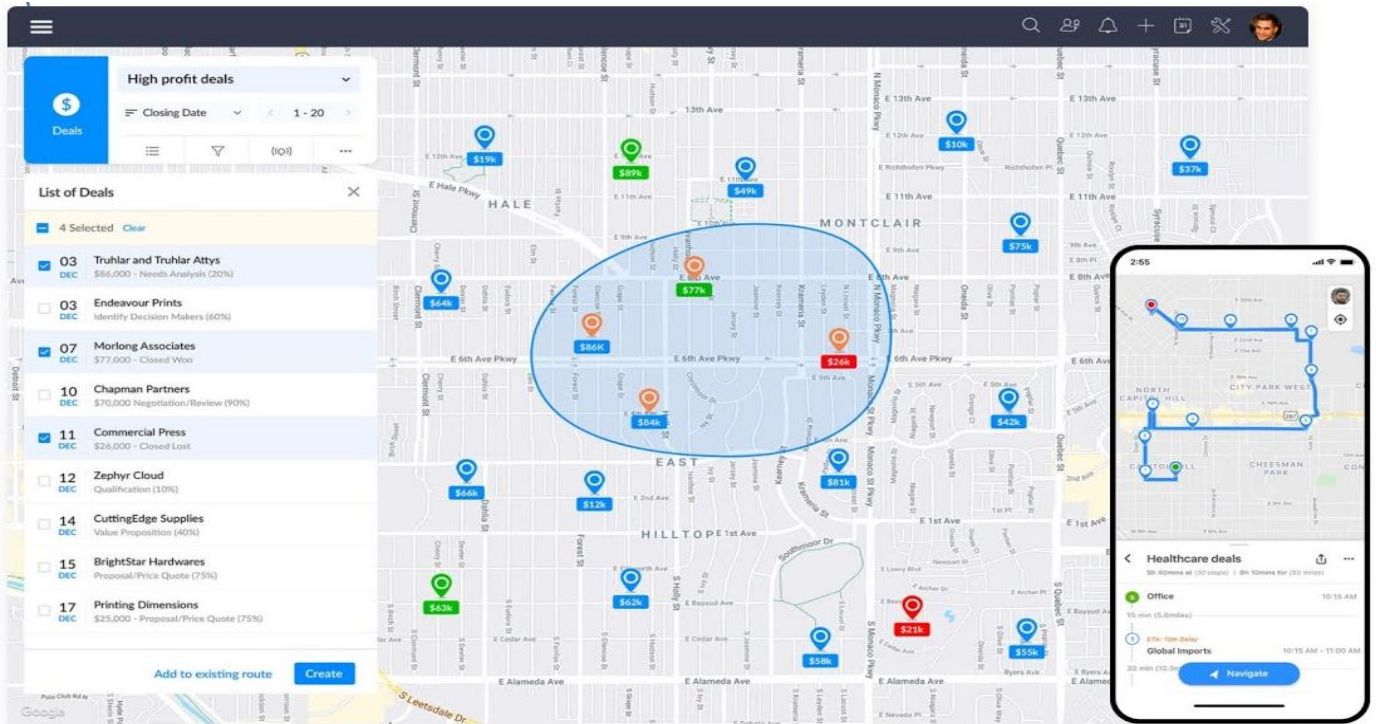
FULL NAME	CHECK-IN BY	TITLE	CHECK-IN COMMENT	CHECK-IN TIME	CHECK-IN SUB-LOCALITY	CHECK-IN CITY	CHECK-IN STATE	CHECK-IN COUNTRY	ZIP CODE	CHECK-IN ADDRESS
Blair Burkhardt	Blair Burkhardt (1)	Free Consultation with Burkhardt & Company, LLC		Jan 23, 2021 08:31 PM	Turtle Ridge	Irvine	CA	United States	92603	Climbing Vine Irvine CA United States 92603
TOTAL RECORDS IN THIS PAGE : 1 RECORDS										

Below shows the "Check-Ins for Accounts" report, generated in Zoho CRM.

ACCOUNT NAME	CHECK-IN BY	TITLE	CHECK-IN COMMENT	CHECK-IN TIME	CHECK-IN SUB-LOCALITY	CHECK-IN CITY	CHECK-IN STATE	CHECK-IN COUNTRY	ZIP CODE	CHECK-IN ADDRESS
Test Company 1 (1)	Blair Burkhardt (1)	Followup		Apr 24, 2019 10:45 AM	Turtle Ridge	Irvine	CA	United States	92603	Garden Ter Irvine CA United States 92603
TOTAL RECORDS IN THIS PAGE : 1 RECORDS										

Zoho Route IQ

Travel less, meet more Tired of spending hours to plan sales routes by yourself? No worries! RouteIQ saves your valuable time by creating optimized route plans automatically in a matter of seconds!



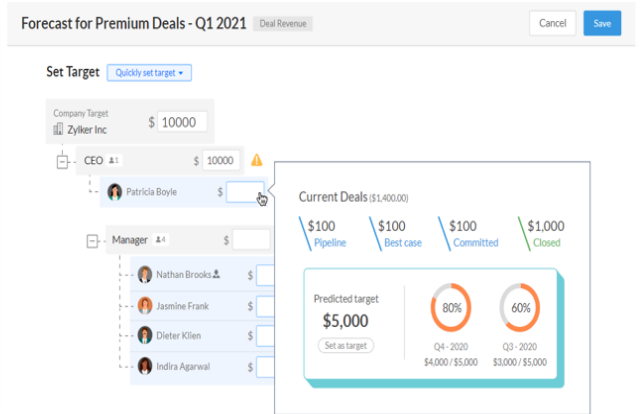
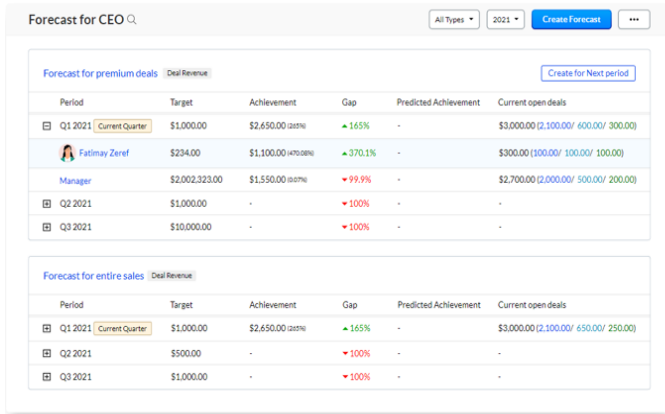
- **Route – Plan, Optimize, Navigate**
 - Plan a route which is automatically optimized based on the distance, appointments, and drop-ins
 - Adjust the route as you go if there are any cancellations or new customers to add
 - Single-click navigation to any customers or any planned routes
- **Map Visualize** Visualize your Zoho CRM leads, deals, contacts, accounts, and events on an interactive map and filter prospects matching your specified criteria.
- **Explore nearest** Explore your CRM leads, deals, contacts, accounts, and events nearby.

Performance Management

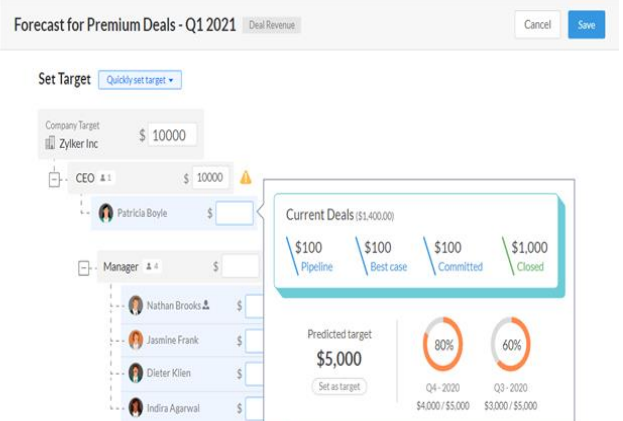
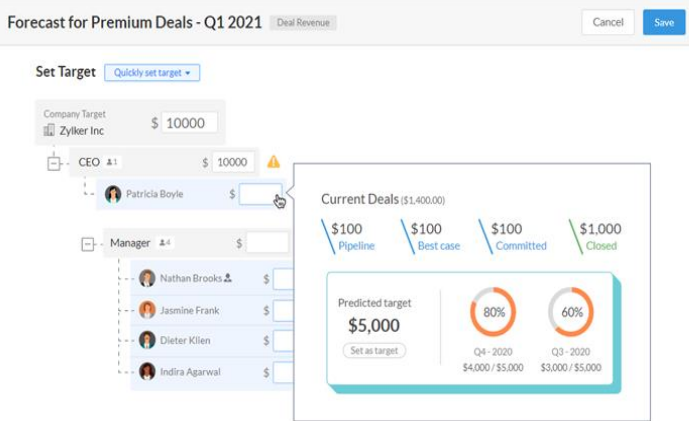
- **Sales Forecasting Build accurate forecasts powered by real-time data**
Forecast your revenue and assign targets for your team using key information like the number of deals in the pipeline, the quotas achieved during the last fiscal year, and the individuals or teams that making the most progress towards their goals. Identify bottlenecks using real-time data and boost your team’s performance.
 - ✓ Build multiple conditional forecasts for your business
 - ✓ Prepare accurate forecasts with Zia’s predictive forecasting
 - ✓ Split deals in your pipeline with “Best case” and

Streamline your goals with multiple forecasting Setup multiple forecasts that consolidate all your deals or just the deals that match specific conditions in your pipelines, for different forecast periods. Zoho CRM lets revenue leaders set solid targets for their sales teams, while giving managers and decision makers greater visibility and control over revenue in the pipeline.

- **Build multiple forecasts for different forecast periods** Create conditional forecasts for different forecast periods to predict your sales performance more accurately.
- **Predictive forecasting for your targets and achievements** When creating a forecast for a new period using a previous forecast as a template, businesses can leverage Zia’s suggestions for company-wide and individual targets based on the historical data of the selected sales forecast. User’s historical and current deal closure pattern will also be analyzed to give you a predicted target achievement for each user in your business hierarchy.



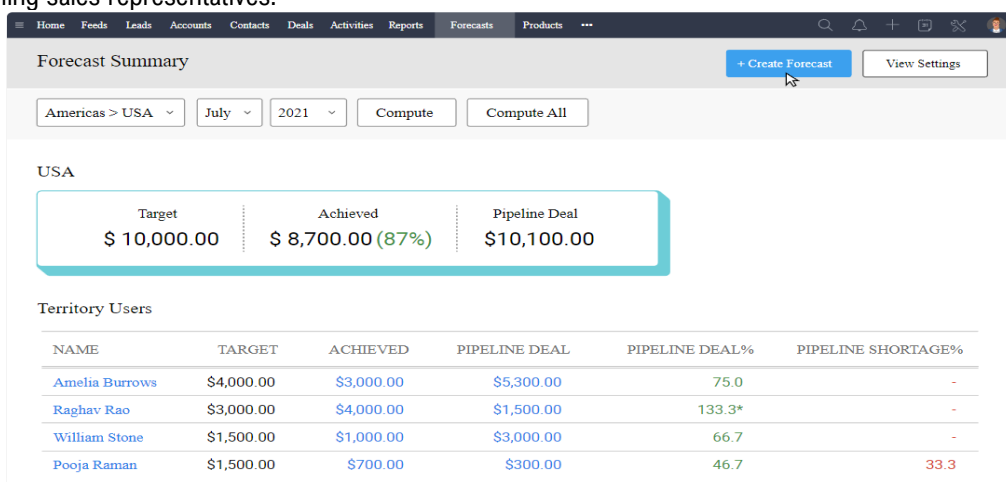
- **Predictive forecasting with AI recommended targets Zia** analyzes your historical forecasting and performance data to recommend the most accurate targets for your business.
- **Transparent pipeline for accurate forecasts** Get complete transparency into open deals, committed deals, and best cases, so you can set realistic goals that your team can meet.

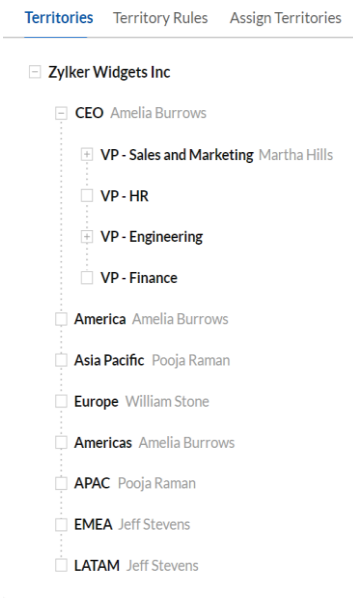


Territory Management

Easy customer segmentation with simple territory management software Whether your company organizes sales teams around geography or product lines, territory management can handle any form of customer segmentation. Share accounts among territories, identify regions that make a profit, allocate resources, and exceed sales forecasts, all while offering excellent customer service.

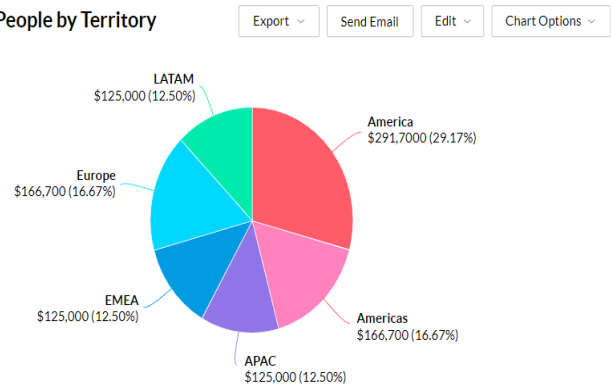
- ✓ View revenue generated by teams classified based on region, product and other relevant criteria.
- ✓ Set rules to assign accounts to the right sales representative.
- ✓ Analyze sales activities across territories with vivid and interactive reports and graphs.
- **Set and track sales targets effortlessly** Get a consolidated view of closed deals and forecast your sales region with the best territory management software. Analyze each region by identifying teams that are making a profit and the best performing sales representatives.





- **Segment and organize your customers** Set rules to automatically assign accounts to territories, and make sure the right people are working together from the beginning.
- **Get insight on territory-wide sales** You don't need multiple tabs to see sales activities across territories. Zoho CRM's enterprise territory management system brings you interactive reports and analytics to get a clear understanding of your sales and make smarter decisions.

Performance of Sales People by Territory



AI Prediction

Sales forecasting done smarter with AI You invest so much time and effort into winning over a lead or a deal, with no clear indication of whether it's worth it. After several interaction, you might get a sense for it, but as new leads pour in, it's hard to keep track of which conversations will pay off. But with Zia's sales forecasting, this will never be a problem again. Zia can assign a score to every lead and deal on the table, using predictive AI to determine whether or not the deal will go through.

- ✓ Identify the status of every deal
- ✓ Disqualify bad leads and free up the pipeline
- ✓ Assign talents based on the prediction score
- ✓ Focus on closing the most probable leads
- ✓ Measure how your sales strategies fare

Zia knows what's closing

There's no surefire way to know the exact outcome of a sales—that's why Zia learned sales forecasting. Zia makes a comprehensive study of your sales data to decode the patterns behind wins and losses. From there, she can effectively predict the chances for each lead and deal to convert and assign an intelligent score to them for salespeople to utilize.

Have a clear view of the forecast

Zia makes it easier for you to focus on the right leads and deals by breaking them up in Zia View. Here, records are split into three columns: likely to win, to lose, and to go either way. This makes it convenient for

The salesperson to prioritize them.

- **Filter in to focus Use** Advanced Filters to sort out records with similar patterns, scores, or activities. You can pinpoint records within a certain score range, a specific forecasting score, or a status, which helps you zero in on the promising deals you're looking for.
- **Know where the action is** Not all records move at the same pace. A deal that has been pending for ages might be on the verge of closing. A lead that you thought was a sure thing might be left unattended. Zia defines these records as "trending up" or "trending down," depending on whether they're becoming more likely to win or lose. Use the Advanced Filters to zero in on these records.

All Territories - All Deals -

DEAL NAME	AMOUNT	CLOSING DATE	PREDICTION	STAGE	CONTACT
100 Custom Widget deals	\$ 3,000,000.00	Feb 10, 2021	90	Negotiation Done	Leota Dillard
Grant Industries Ltd.	\$ 2,000,000.00	Feb 15, 2021	85	Needs Analysis	George Bailey
Avalon Chems Deal	\$45,000.00	Feb 3, 2021	82	Value Proposition	Melodie Bible
Terraform Real Estate	\$55,000.00	Feb 22, 2021	76	Qualification	Mark Boucher
PharmPlus	\$55,000.00	Feb 22, 2021	70	Needs Analysis	Dolores Grant
Henderson Hardware	\$52,400.00	Feb 21, 2021	70	Value Proposition	Kitzman Chau

All Deals -

Filter POTENTIALS By	Prediction View	Sort By None
<input type="checkbox"/> Touched Records <input type="checkbox"/> Untouched Records <input type="checkbox"/> Record Action <input type="checkbox"/> Related Records Action <input type="checkbox"/> Prediction <input type="checkbox"/> Email Sentiment <input type="checkbox"/> Email Status <input type="checkbox"/> Activities <input type="checkbox"/> Notes <input type="checkbox"/> Closing Date <input type="checkbox"/> Potential Name <input type="checkbox"/> Amount <input type="checkbox"/> Account Name <input type="checkbox"/> Contact Name <input type="checkbox"/> Potential Owner <input type="checkbox"/> Account Status	Likely to win in 10 days \$ 152,491	Likely to win THIS MONTH \$ 193,904
	Deal Name UI Widget Contact Name Emily Grace Deal Owner Samuel Turner	Likely to LOSE \$ 5,394,564
	Deal Owner Samuel Turner	UI Widget Tomoyo Sayaka Samuel Turner
	225/55/R17 Clinton Thomas Rachel Straton	225/55/R17 Aston Micheals Rachel Straton
	205/60/R16 Panacea hospitals Keith Johnson	205/60/R16 Panacea hospitals Keith Johnson
	205/60/R16 Zlyc Inc Keith Johnson	UI Widget Mathew Robert Cecilia Rogers
		UI Widget Dmitry Popov Cecilia Rogers

Predictive Sales

- Lead & Deal Prediction
- Voice Assistant
- Anomaly Detection
- Zia for Emails
- Best time to Contact
- Recommendation
- Prediction Builder
- Competitor Alert
- Data Enrichment
- Intelligent Automation
- Zia-Assignment Suggestion
- Zia-Workflow Suggestion
- Zia Vision

Leads Enrichment Settings

Last updated on December 12, 2021 by deepak.

Note
Zia will fetch contextual information from the web based on any one of the following details:
Company, Email and Website

Enrichment Fields	Zoho CRM Fields
Designation	Title
Company Name	Do not map this field
Fax	Title
Phone	First Name
Other Phone	Last Name
Email	Lead Source
Secondary Email	Secondary Email
Industry type	Industry
Website	Website

Customize how fields are mapped

Ex. Screenshot of Setting up - Data Enrichment

Data Enrichment by Zia

Zia has discovered the following data related to the Company "Airbnb" and the Email "mike@airbnb.com"

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

Configure field mapping

Cancel

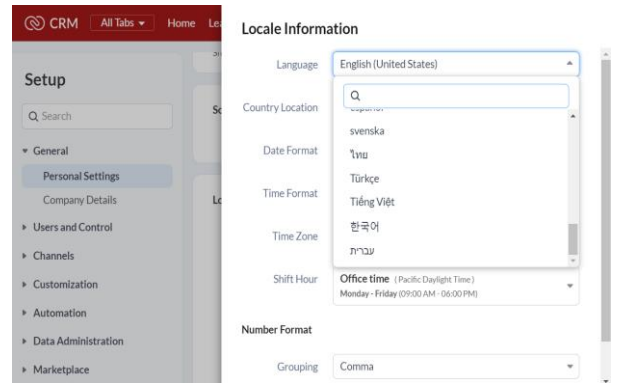
Update Contact

No more incomplete profiles

Zoho CRM - Multi- Language Support

Zoho CRM is available in 28 languages. Here is the list of languages:

- Arabic
- English (US)
- English (UK)
- Bulgarian
- Bahasa Indonesian
- Chinese (Simplified)
- Chinese (Traditional)
- Croatia (Hrvatski)
- Czech
- Dutch (Nederland)
- Danish
- French
- German (Deutsch)
- Hungarian (Magyar)
- Hindi
- Italiano (Italy)
- Japanese
- Polish (Polish)
- Portuguese (Brazil)
- Portuguese (Portugal)
- Russian (UK)
- Spanish (Español)
- Swedish(Svenska)
- Thai
- Turkish
- Vietnamese
- Korean
- Hebrew



Zoho CRM - Multi- Currencies Support

The multi-currency support in Zoho CRM helps you to handle business and transactions in the global market effortlessly. With the multi-currency feature you can: Estimate the value of a deal in your home currency as well as in your customer's local currency.

Customization

One CRM to match everyone's selling style

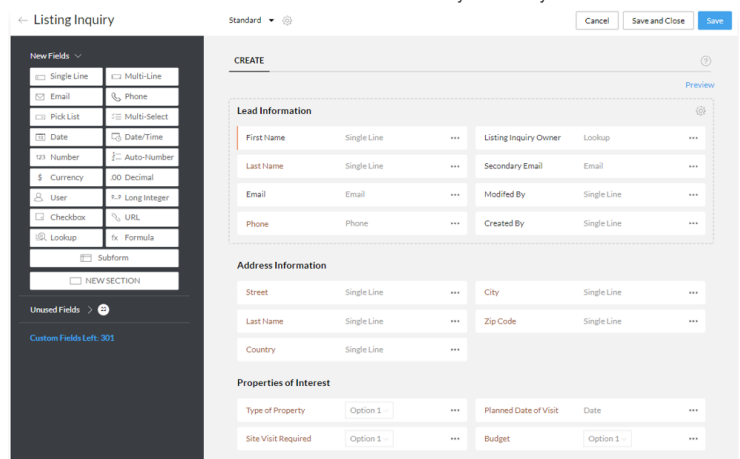
- ✓ Manage multiple businesses with ease
- ✓ Validate data before it enters in your CRM
- ✓ Multiple layouts for multiple processes

Key Function:

- Page Layouts
- Custom Components
- Views and Filters
- Subforums
- Currencies and Translations

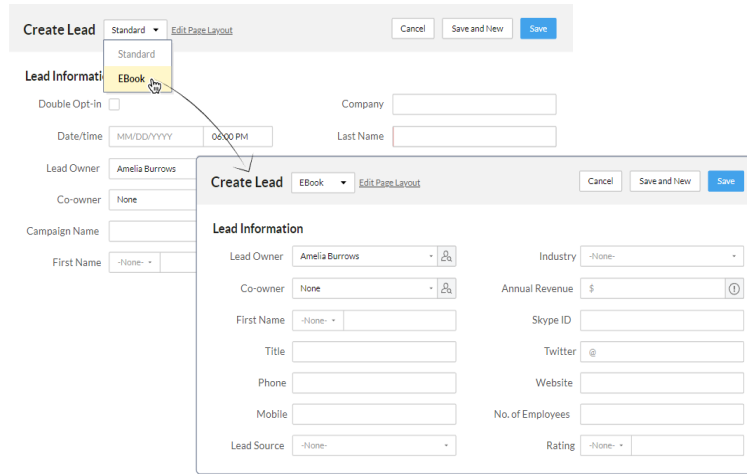
Customize your modules

Modules are designed to help you organize subsets of information. Zoho CRM to serve your sales and marketing needs. For a personalized CRM, add custom modules to narrow in on what matters for your industry.



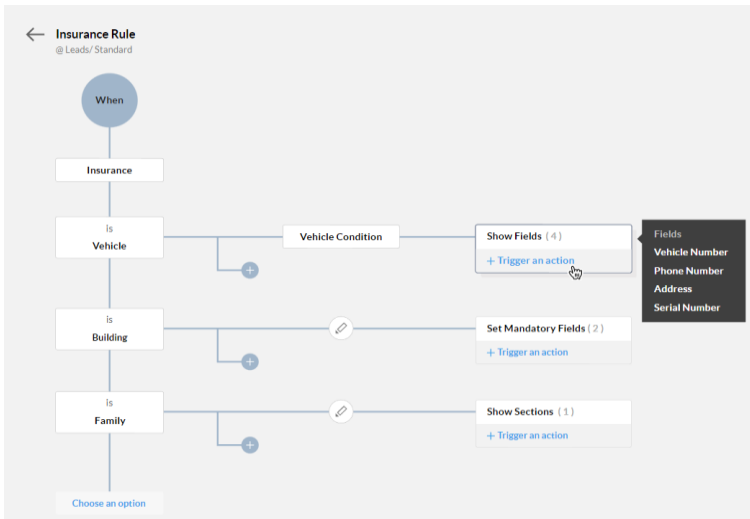
A layout for every process

Manage sales for multiple products, geographies, or processes, from one CRM system. Page layouts help your sales representatives view and access personalized data and create workflows to function independently. With fields, links, and buttons, you get everything you need to design your own layouts for each new process.



Conditional fields for a simpler experience

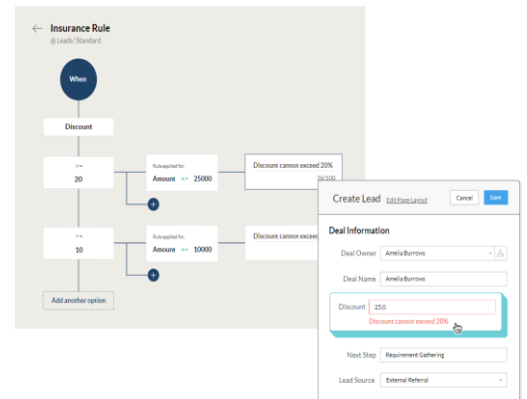
When your organization has multiple products, it can be very difficult to show all the specifications for all the features within a product. With Conditional Fields in Zoho CRM, you can make filling out forms easy. The only fields the user works with are ones they select, resulting in a faster, clutter-free experience for your sales team.



Ensure the right data enters your CRM

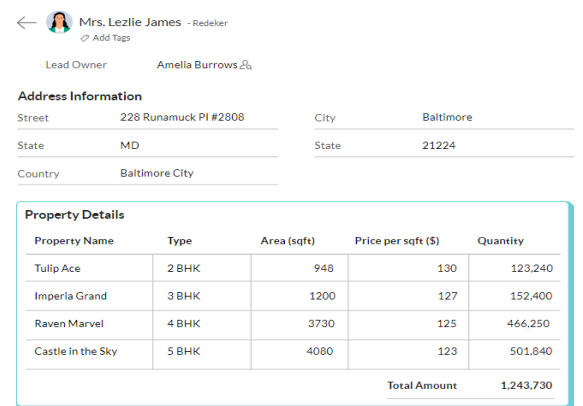
The quality of your CRM data directly impacts

Your efficiency. Make sure the right information enters your CRM, with condition checks across multiple criteria that are specific to your industry and need.



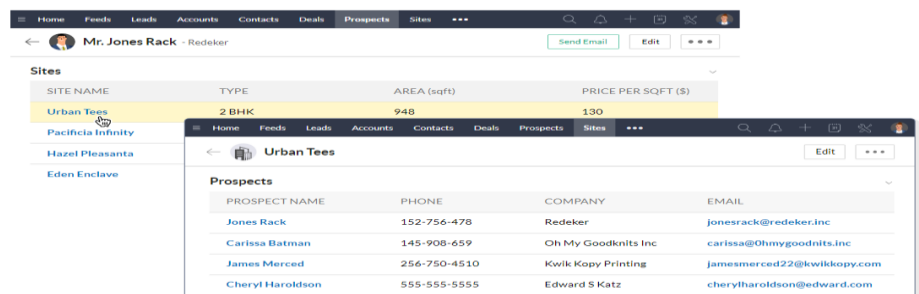
Forms within forms for better detail

Forms are needed to capture customer information. But a basic form isn't enough, especially when there are many details to be captured. Use Sub forms to associate multiple items to one customer – like adding accessories against the primary sales. You can also add quantity and aggregate functions, so all relevant info stays within a record.



Relate your data for the right context

Data doesn't mean much without context, and most of the time, your CRM data is spread across different modules. Provide more context to your data by linking records across modules. Link Campaigns with Leads, Contacts with Accounts, and vice-versa



Security

We keep your data secure

Out state-of-the-art security systems controls access to your entire organization and secures your data at different levels. With features such as encryption, audit logs, IP restrictions, and two-factor authentication, protect your data and allow only authorized users access to it.

- ✓ Encrypt fields with sensitive data
- ✓ Monitor CRM activities with Audit logs
- ✓ Restrict access from unauthorized IP address
- **Encryption to protect sensitive data** Zoho CRM uses one of the strong and robust methods - AES - to encrypt and decrypt your sensitive data. Apart from protecting data during transit, Zoho CRM secures data stored in servers using the AES-256 protocol and prevents data from being leaked or lost.

- **Meeting HIPAA guidelines with Zoho CRM** As a Business Associate, Zoho CRM helps its customers stay HIPAA compliant by having necessary safeguards in place to ensure the integrity of the protected health information. Zoho is not directly involved in collecting the Electronic Protected Health Information (ePHI) from the data subjects.

- **Empowering businesses to be GDPR ready** Zoho CRM is fully equipped for GDPR compliance as a data processor. Across data collection, storage and processing, Zoho CRM offers many options designed to help businesses safeguard customer data and meet the security and privacy standards set in GDPR.

- **Vaults to store important information** Secure your most important, private business data by storing it in vaults. Prevent hackers and other users from gaining access to your vault contents, and ensure that your information is safe.

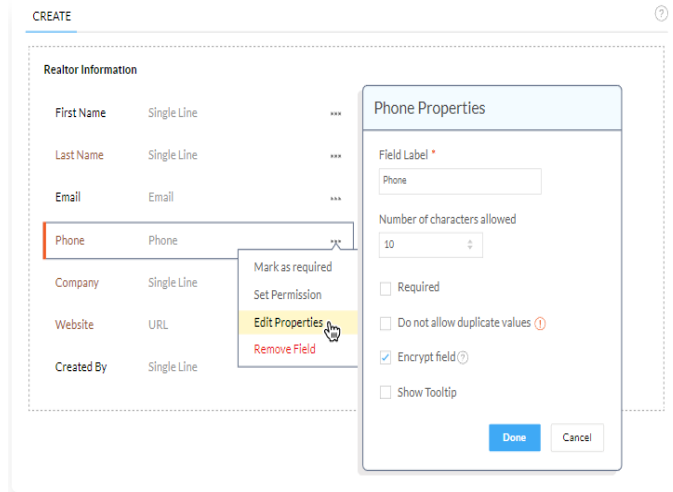
- **Keep your data close** Decide where you want your data to be hosted. Select from state-of-the-art data centers in the US and EU. Each center has multiple levels of access restrictions, including video monitoring, security cameras, biometric limited access systems, and bullet resistant walls to protect your data from any physical attacks.

- **Track user activity with audit logs** Monitor your sales team's activities with audit logs, so you can track who did what and when. For example, all actions done by your users with respect to record deletion and modifications will be audited so that you take proactive decisions.

- **Prevent unauthorized access with IP restrictions** Use our IP restrictions to limit unauthorized users by only allowing sign-in from designated IP addresses, like your corporate network. This means that even if your users have their credentials stolen, your CRM will still be protected from unauthorized access.

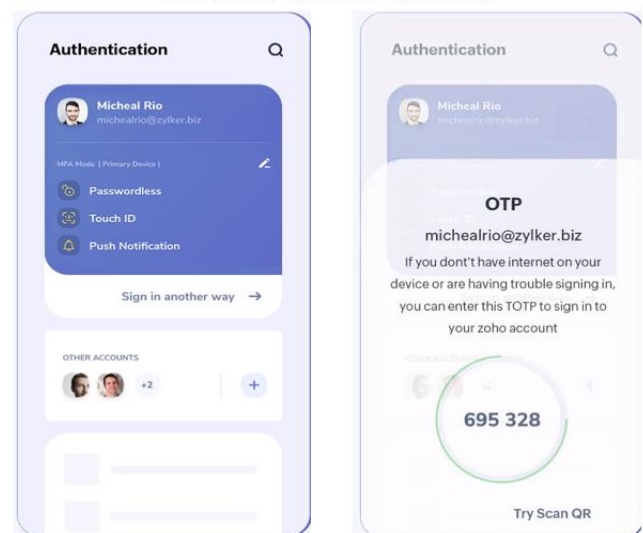
- **Tighten security with two-factor authentication** Provide an additional layer of security for your account with two-factor authentication in Zoho CRM. In addition to a username and password, an authentication token is required to log into your account.

- **Regular data backups** All your data is backed up in real time across multiple servers. In the event of hardware failure or natural disaster, your data stays secure.



Alternate Verification

Having an internet problem? Not receiving push notifications? Don't worry, OneAuth's Alternate Verification lets you switch your MFA mode as Scan QR code or Offline OTPs.





Zoho provides Software as a Service(SaaS) products to millions of users worldwide to solve their business problems. Security is a key component in our offerings, and is reflected in our people, process, and products. This page covers topics like data security, operational security, and physical security to explain how we offer security to our customers.

Our security strategy involves the following components

- ✓ Organizational security
- ✓ Physical security
- ✓ Infrastructure security
- ✓ Data security
- ✓ Identity and access control
- ✓ Operational security
- ✓ Incident management
- ✓ Responsible disclosures
- ✓ Vendor management
- ✓ Customer controls for security



recognized as a leader in the Nucleus Research CRM Technology Value Matrix 2022.



"Zoho earns the top spot in usability in the 2022 CRM Value Matrix, highlighted by its breadth of functionality, out-of-box customizability, and exceptionally intuitive UI. Over the last few years, Nucleus has continued to see Zoho move upmarket."

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