

ZOHOLICS

UK

— 2015



# Setting up CRM for your Business

## Quick Overview



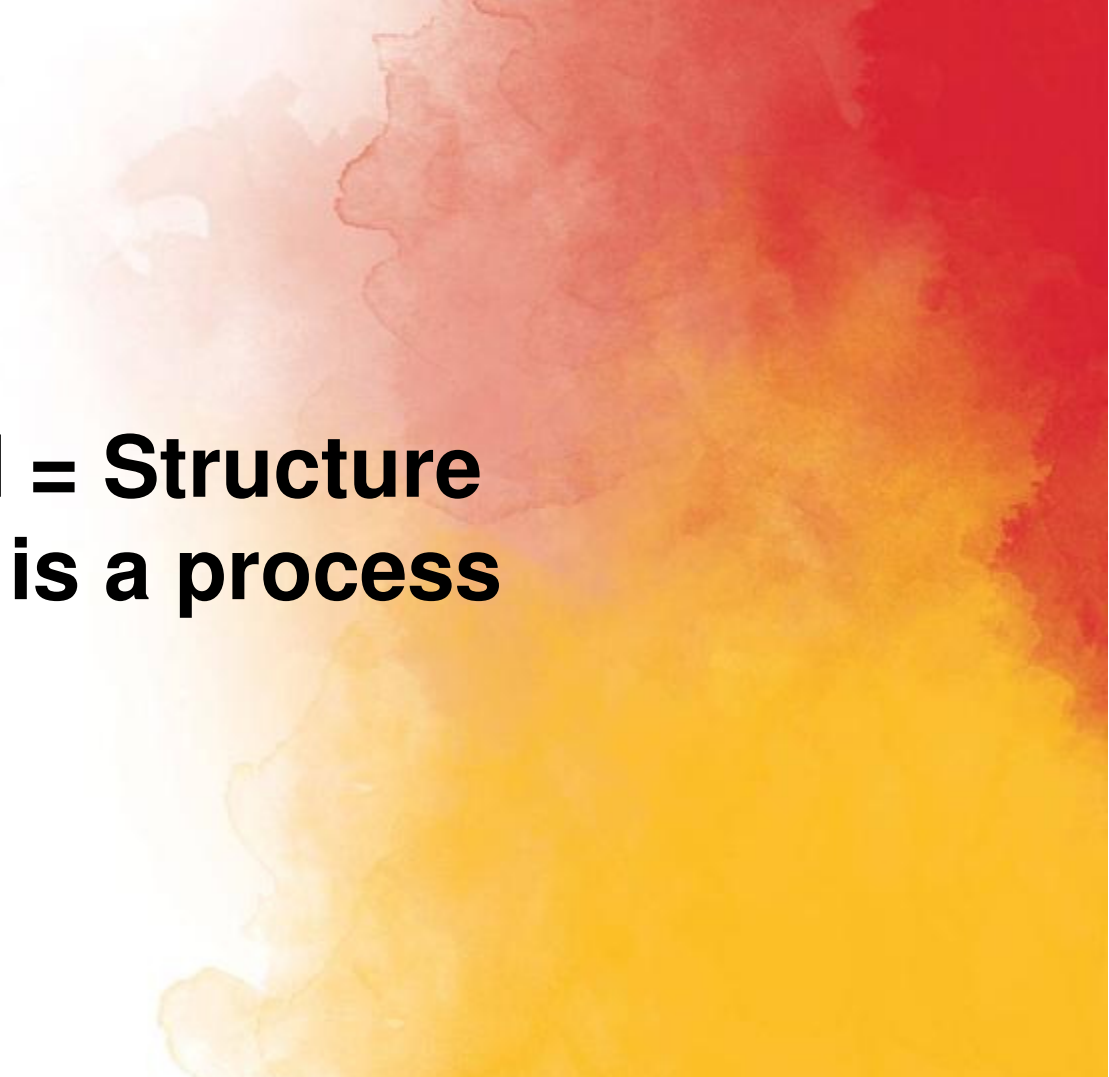
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Advanced  
Solution Provider



**CRM = Structure**  
**CRM is a process**





What Are Your Goals?

Don't forget the User



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# **Terminology Demo**

# Terminology - Demo

- Modules – The individual sections of the CRM
- Records – Individual files within your business
- Account – A company or a main client entity
- Contact – A person, usually associated with an Account
- Lead – An expression of interest in your business, unqualified
- Potential – A specific business opportunity or project
- Activity – Interaction between the company and an external party



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# Organization Settings **Demo**

# Organization Settings

- **Company Information**
- **Locale Information**
- **Logo**
- **Fiscal Year**
- **Currencies**

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# Users & Permissions **Demo**

# Users & Permissions

- **Profiles**
- **Roles**
- **Groups**
- **Data Sharing**

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# Customization **Demo**



# Customization

- **Fields**
- **Layouts**
- **Modules**

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# Record Customization **Demo**

# Record Customization

- **Business Card**
- **Organize Order**
- **Related List Columns**

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# **Data In / Out Demo**

# Data In / Out

- **Views**
- **Reports**
- **Importing**



Good Data In



Quality data OUT



**Good Reporting**

# Engage with a Partner



**Train & Review**



Questions?



**THANK YOU**