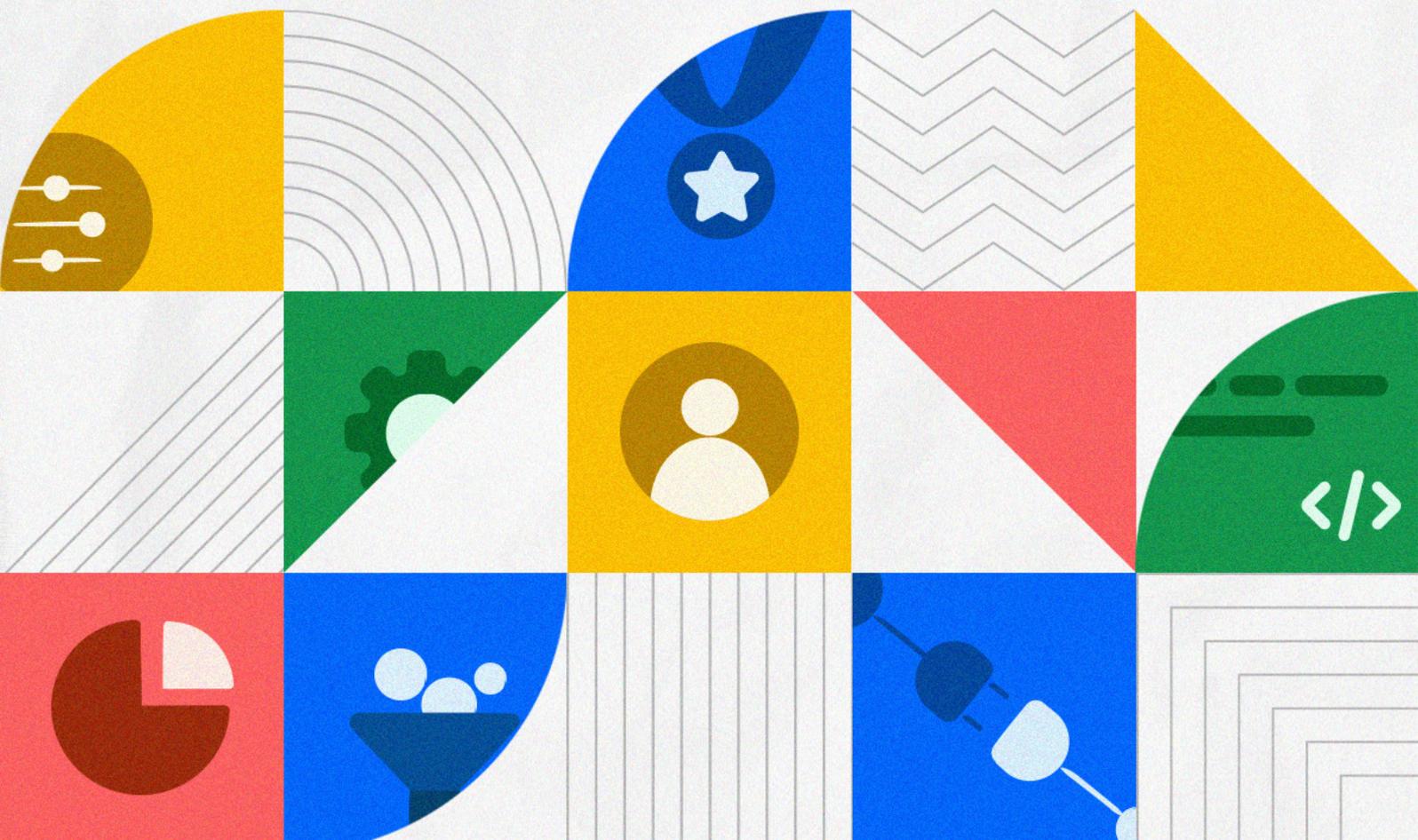




SALES REP AGENDA





Summary of the Agenda

Duration: 2 days, 5 hours per day

Who it is for:

Sales representatives interested in practical training in using Zoho CRM to manage their day-to-day sales activities and improve their performance.

Day-1

Logging in to your account

- Accessing Zoho CRM
- Customizing your personal information

Sales Process Automation

- Leads, Contacts, Accounts, Deals, and Campaigns

Inventory Management

- Products
- Quotes and Invoices
- Sales Orders and Purchase Orders

Follow-up and Collaboration

- Tasks
- Meetings
- Calls
- Calendar Booking

Mass Actions*

- Mass Emails
- Macros
- Manage Tags
- Mass Conversion
- Transferring Ownership
- Updating Fields

Sales Collaboration

- Collaborating with colleagues using feeds

Day-2

Sales Metrics

- Default Reports
- Managing Reports and Dashboards

Customization

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

Engaging with Customers

- Email Integration (using IMAP or POP)
- BCC Dropbox
- Signals
- Working with Lead Scoring

Data Administration

- Import (module-specific)
- Import History

- Recycle Bin
- Audit Logs

Extensions and Integrations

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

Zia in CRM

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

Zoho CRM Mobile Apps



For more information
Email: training@zohocorp.com