

Zoho CRM for Administrators

Course Duration: 5 days (40 hours)

Course Description:

The **Zoho CRM for Administrators** training program offers a comprehensive, in-depth learning experience designed to empower administrators to efficiently set up and manage their businesses using Zoho CRM. This course spans multiple learning paths and covers the latest features and enhancements of Zoho CRM, ensuring participants stay up to date with the platform's capabilities.

Through hands-on sessions and practical exercises, participants will gain real-world skills in customizing modules, automating workflows, managing users, and analysing data.

By the end of this training, you will be well-equipped to leverage Zoho CRM to streamline business processes, enhance customer engagement, and drive organizational success.

Audience Profile:

This course is ideal for:

- Zoho customers seeking to enhance their understanding of Zoho CRM and its capabilities.
 - Business owners looking to streamline operations and improve customer relationship management using Zoho CRM.
 - CRM administrators responsible for setting up, configuring, and maintaining their organization's Zoho CRM system.
 - Professionals interested in discovering how Zoho CRM can support a successful and efficient customer journey.
 - Anyone looking to maximize the value of Zoho CRM within their business processes.
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Prerequisites:

Participants should have:

- A basic understanding of CRM concepts.
 - No prior experience with Zoho CRM is required, although basic knowledge is beneficial.
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Course Objectives:

By the end of this course, participants will be able to:

- Set up and configure their organization's Zoho CRM account efficiently, including company details, fiscal year settings, and business hours.
 - Manage users by creating roles, profiles, and data sharing rules to ensure appropriate access and security
 - Customize CRM modules and fields to align with business processes, including creating custom fields, layouts, and validation rules.
 - Employ advanced process management tools such as Blueprint and Command enter to model and enforce business processes.
 - Ensure data security and compliance by configuring audit logs, data backup, and security policies.
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Table of Contents (TOC):

Module 1: General

- Personal Settings
 - Company Details
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Module 2: Sales Process Automation

- Leads, Contacts, Accounts, Deals, and Campaigns
 - Activities (Tasks, Meetings, and Calls)
 - Calendar Booking
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Module 3: Inventory Management

- Products, Quotes, Invoices, and Sales Orders
 - Purchase Orders, Price Books, and Vendors
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Module 4: Support

- Cases and Solutions
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Module 5: Users and Control

- Users
 - Security Control
 - Compliance Settings
 - Territory Management
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Module 6: User Interface

- All mass actions (Emails, Field Updates, Changing Owner, Conversion)
 - Macros
 - Manage Tags
 - Merge Duplicates
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Module 7: Basic Customizations

- List view
 - Kanban View
 - Canvas View
 - Advanced Filters
 - Business Card View
 - Related List Customization
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Module 8: Advanced Customizations

- Modules and Fields
 - Templates
 - Wizards
 - Pipelines
 - Copy Customization
 - Customize Home page
 - Translation
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Module 9: Channels

- Emails
 - Telephony
 - Social
 - Chats
 - Portals
 - Webforms
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Module 10: Automation

- Workflow and Actions
 - Schedules
 - Assignment Rules
 - Case Escalation Rules
 - Scoring Rules
 - Marketing Attribution
 - Segmentation
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Module 11: Process Management

- Blueprint
 - Approval Processes
 - Review Processes
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Module 12: Experience Center

- Signals
 - CommandCenter
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Module 13: Data Administration

- Import (module-specific and data migration from other CRM)

- Export
 - Data Backup
 - Storage
 - Recycle Bin
 - Audit Log
 - Sandbox
 - Admin Tool
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Module 14: Marketplace

- All
 - Zoho
 - Google
 - Microsoft
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Module 15: Data visualization

- Reports and Dashboards
 - Forecasts
 - Feeds
 - Motivator
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Module 16: Mobile apps

- CRM Mobile App
 - CRM Analytic App
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Module 17: Zoho Directory

- Single Sign-On (SAML)
 - Security Policies
 - Active Directory Sync
 - Login History
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Module 18: Zia in Zoho CRM

- Ask Zia
 - Capabilities of Zia in Zoho CRM
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Module 19: What's New?

- Kiosk studio
 - Canvas (Form view)
 - Cadences
 - Team Space, Team Module, CPQ
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Labs - Hands-on exercises will be provided to ensure participants gain practical, real-world experience with Zoho CRM. These sessions are intended to offer a broad overview with industrial examples—they're not tailored to specific business requirements.