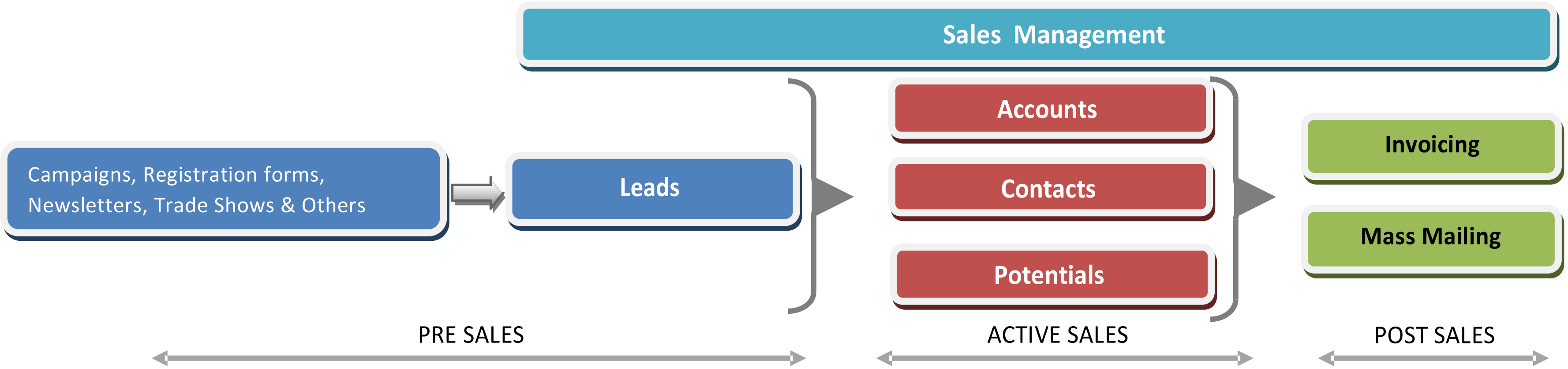
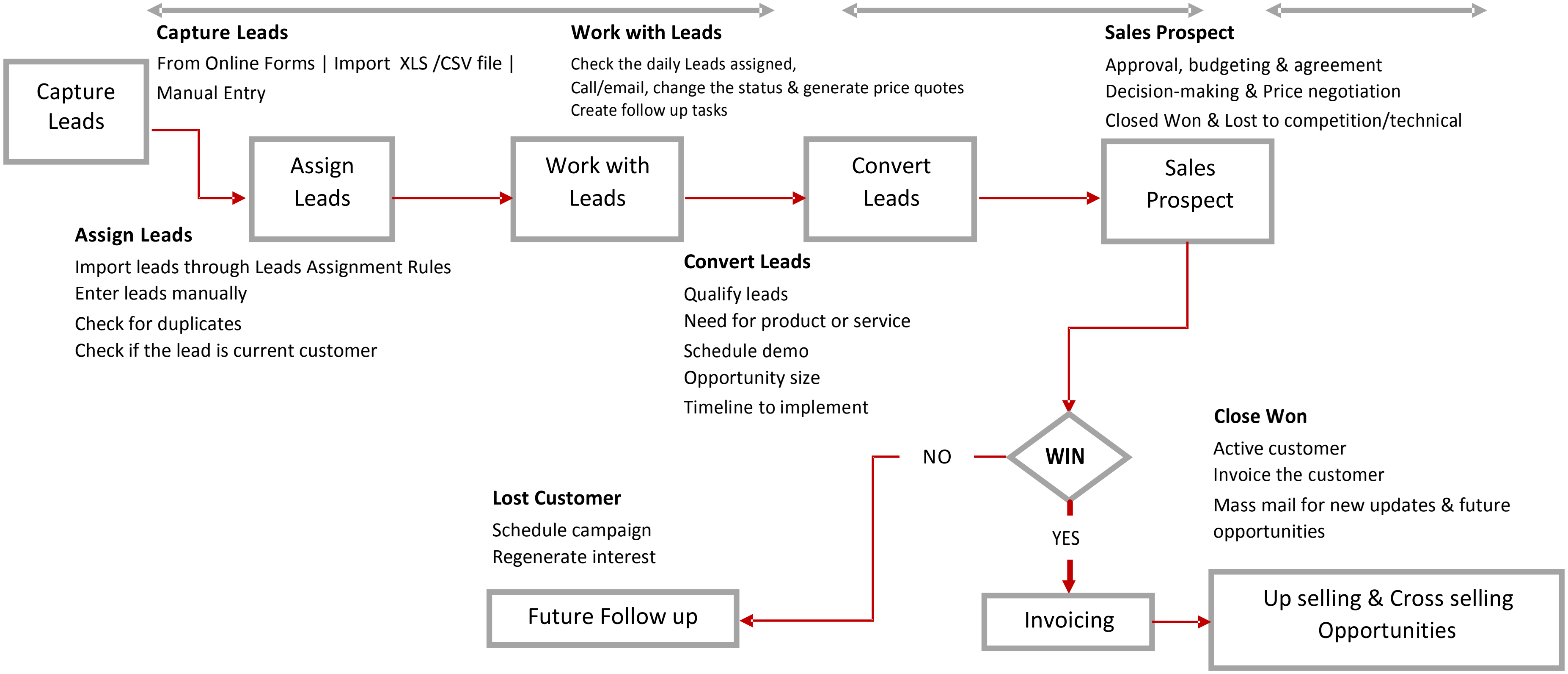
Sales Overview

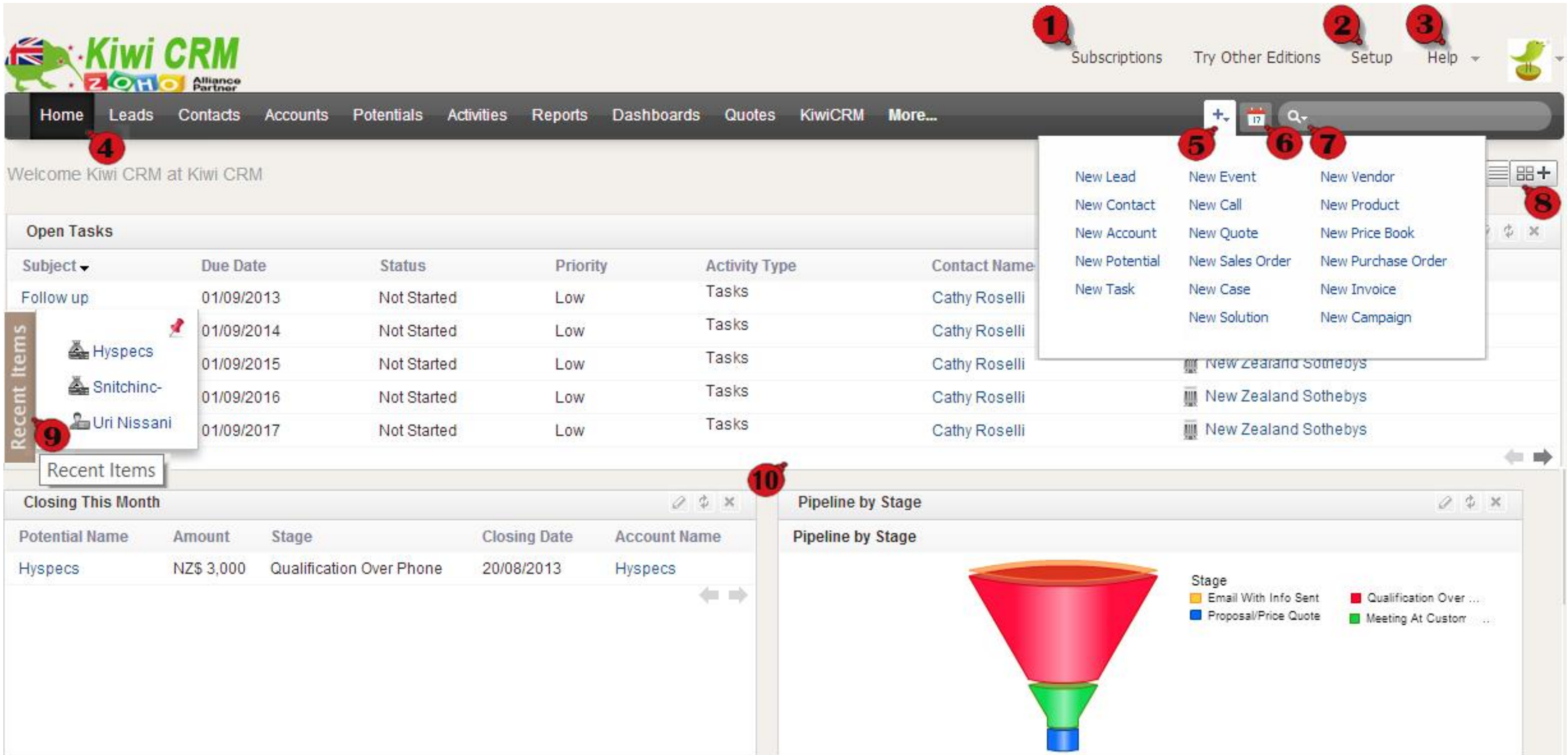
Welcome to Zoho CRM! This guide will help you get started fast, by explaining how to complete some of the most common tasks you will need to get the most of your Zoho CRM experience.





Homepage Overview

To access most of the features, tools and options in Zoho CRM, you should get comfortable finding your way around the Top links modules and workspace.



1. Manage Subscription
2. Personalize & Configure Zoho CRM
3. Refer online help document
4. Modules (Tabs)
5. Create new records
6. Access Calendar
7. Global search option
8. Add component to Home screen
9. View recent items
10. Workspaces

Getting Started

This section aims at providing you an overview of Zoho CRM's capabilities and guides you through the initial steps to personalize Zoho CRM as per your requirements.

Function	Purpose	Steps
Add Users	To add additional users into the Zoho CRM account	Setup > Admin Settings > Users > Add User
Company Name	To add personalized company name for all your business communication	Setup > Admin Settings > Users > Add User > Company Name
Add Company Logo & Currency	To add your personalized company logo and fiscal currency	Setup > Admin Settings > Company Details > Edit
Time Zone, Country & Language	To customize your personal settings	Setup > Personal Settings > Account Information > Edit
Show / Hide Tabs	To add /remove tabs as per your organizations requirement	Setup > Tab Settings > Organize Tabs
Rename Tabs	To change tab names as per your business process	Setup > Tab Settings > Rename Tabs > Edit
Add Fields	To create custom fields as per your organization's need	Setup > [Module] Settings > Field List > New Custom Field
Add / modify Pick List	To edit the default pick list values or to add new pick list values for modules	Setup > [Module] Settings > Fields List > Edit Pick list
Remove Fields	To remove default or unwanted fields from modules	Setup > [Module] Settings > Edit Page Layout
Modify Field Property	To change field either to mandatory or optional (read-only)	Setup > [Module] Settings > Edit Page Layout > Edit (Field Label)
Add Section	To have additional sections in a module and combine Certain fields within it	Setup > [Module] Settings > Edit Page Layout > Create Section
Fiscal year settings	To set the Fiscal start month of your organization	Setup > Admin Settings > Fiscal Year
Custom View	To set up custom view of modules based on field criteria	Setup > [Module] Settings > Custom View Settings > New View

Visit **http: //www.KiwiCRM.co.nz**, to access detailed instructions, frequently asked questions and help document on using Zoho CRM.

Email to Info@KiwiCRM.com and post your inquiries

Contact our technical support over phone at **+64 (0)21 330 266**