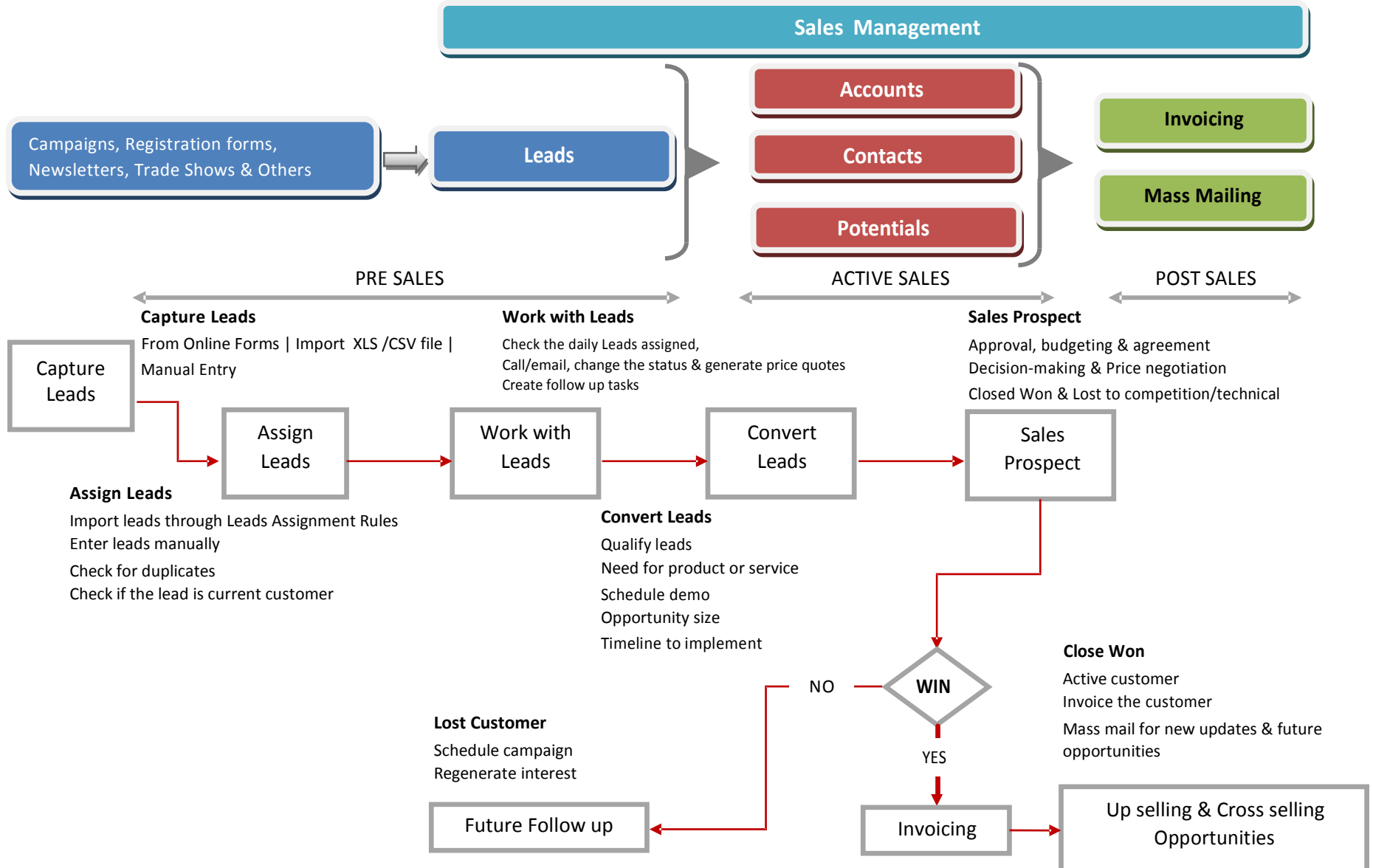


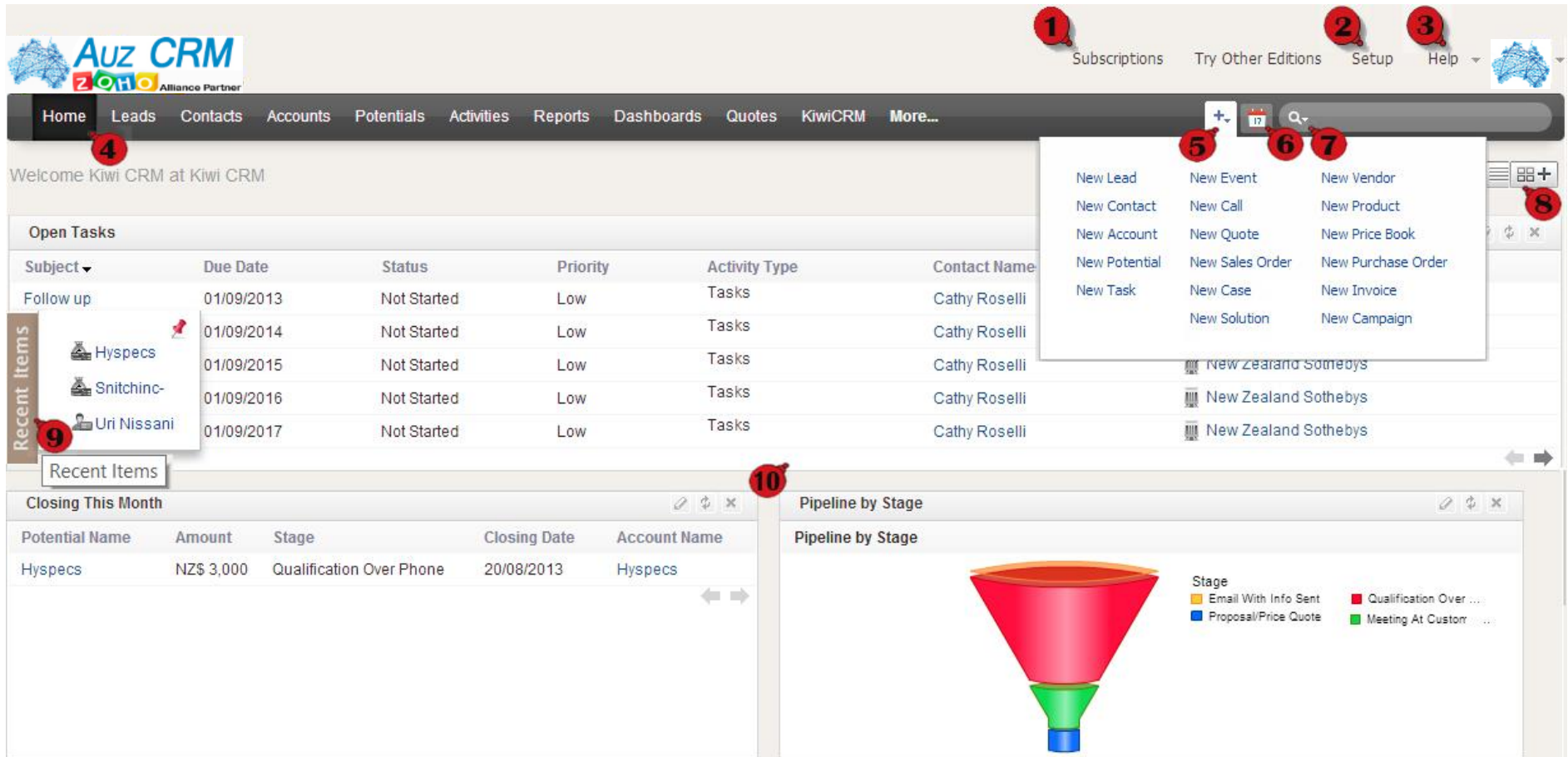
**Sales Overview**

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.



The screenshot shows the Zoho CRM homepage with the following elements highlighted by numbered callouts:

- 1:** Subscriptions link in the top right navigation bar.
- 2:** Setup link in the top right navigation bar.
- 3:** Help link in the top right navigation bar.
- 4:** Home tab in the main navigation bar.
- 5:** New record creation menu (New Lead, New Event, New Vendor, etc.).
- 6:** Calendar icon in the top right.
- 7:** Global search icon in the top right.
- 8:** Add component icon in the top right.
- 9:** Recent Items dropdown menu.
- 10:** Workspace tabs (Closing This Month, Pipeline by Stage).

Subject	Due Date	Status	Priority	Activity Type	Contact Name
Follow up	01/09/2013	Not Started	Low	Tasks	Cathy Roselli
Hyspecs	01/09/2014	Not Started	Low	Tasks	Cathy Roselli
Snitchinc-	01/09/2015	Not Started	Low	Tasks	Cathy Roselli
Uri Nissani	01/09/2016	Not Started	Low	Tasks	Cathy Roselli
	01/09/2017	Not Started	Low	Tasks	Cathy Roselli

Potential Name	Amount	Stage	Closing Date	Account Name
Hyspecs	NZ\$ 3,000	Qualification Over Phone	20/08/2013	Hyspecs

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

Contact our technical support over phone at **+61 (0)2 8003 7212**