

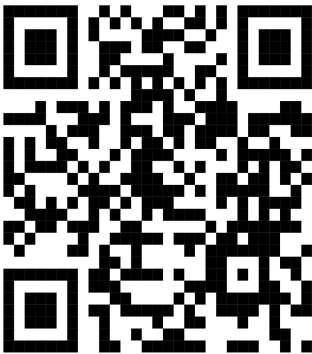


Premium
Partner

Zoho CRM User Guide for Mobile Retail



- QR Code for Installation of CRM App

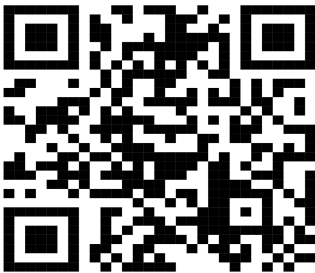


Android



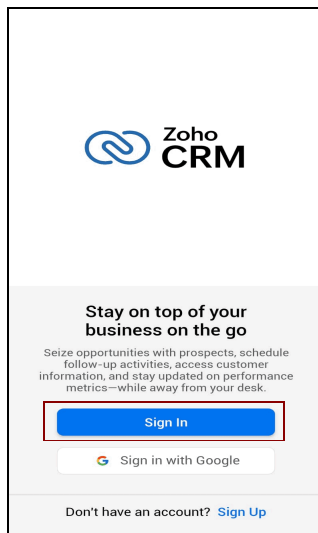
IOS

- QR code for Dista app IOS and Android

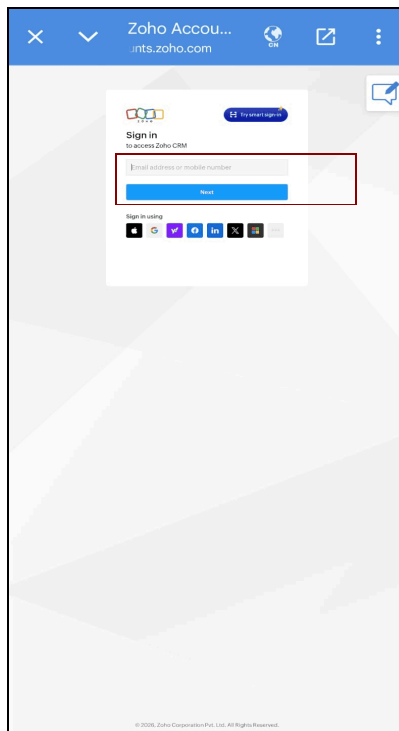


1. How to Login to CRM

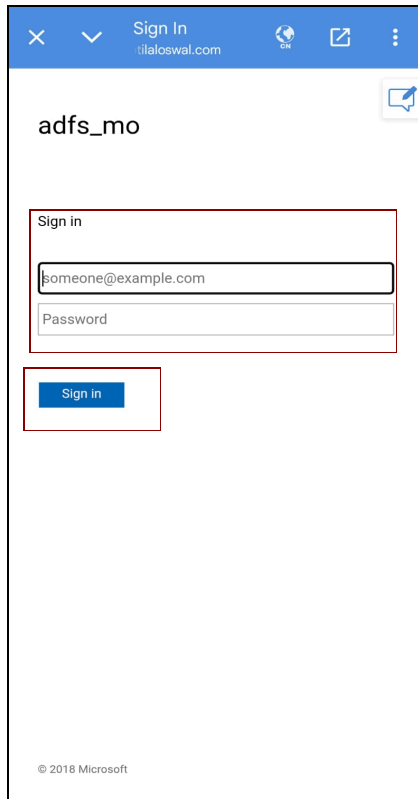
- Open CRM app Click on Sign



- Enter your Email after entering Email you will be redirected to adfs_mo login page.



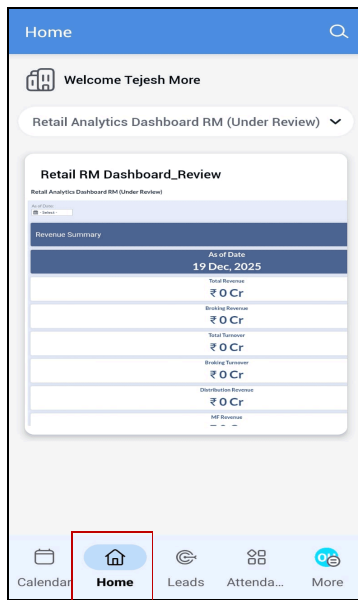
- Enter the Login Credentials and click on sign in button.



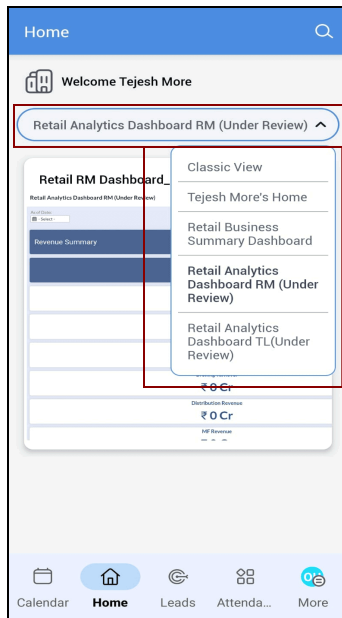
- After login you will get redirected to One Auth page, here you have enter otp or verify it by Zoho Oneauth app.

2. How to View Dashboards

- Click on Home tab here you can see your Dash Boards.



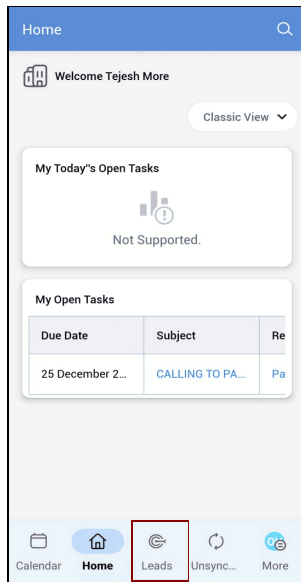
- Click on the bar for change dashboard View and select the view.



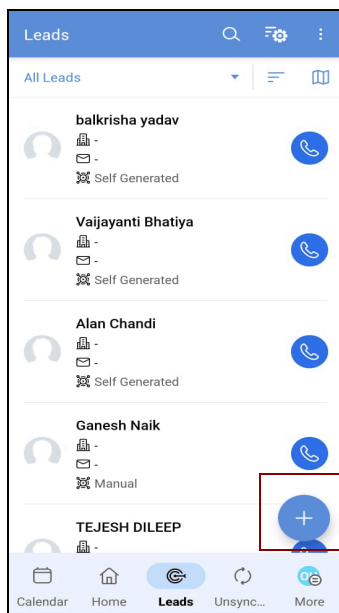
3. How to create Lead

After Logging in you will get redirected to the Home page

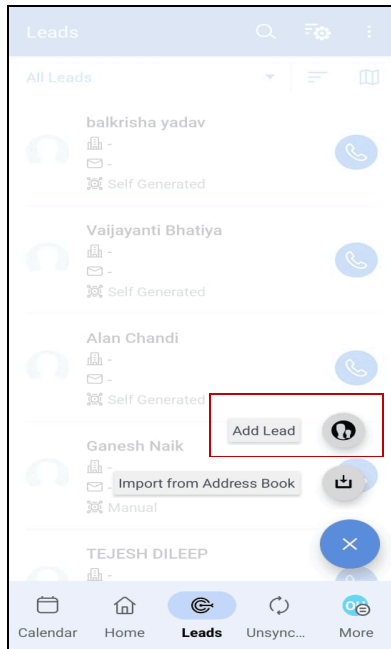
- Click on the leads tab



- Click on the plus Icon on the bottom of the right corner.



- Click on Add Lead.



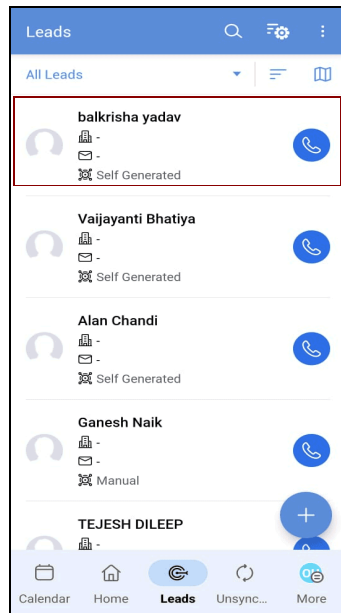
- Now fill out all the fields as required in the form.
- Click on Create.

A screenshot of the 'Add Lead' form in the application. The top bar is blue with a back arrow, the text 'Add Lead', a dropdown menu showing 'Offline', and a 'Save as draft' button. Below the bar, there's a section 'Create Lead' with a house icon. The main form area is titled 'LEAD INFORMATION' and contains several fields: 'Salutation' (with a dropdown arrow), 'First Name' (with a red asterisk), 'Last Name' (with a red asterisk), 'Mobile' (with a red asterisk), 'Lead Source' (with a dropdown arrow), 'Profession' (with a dropdown arrow), 'Lead Category' (with a red asterisk and a dropdown arrow), 'Product' (with a red asterisk and a dropdown arrow), 'Margin Amount Expected' (with a dropdown arrow), and 'Email'. At the bottom, there's a blue bar with a 'Create' button highlighted by a red box.

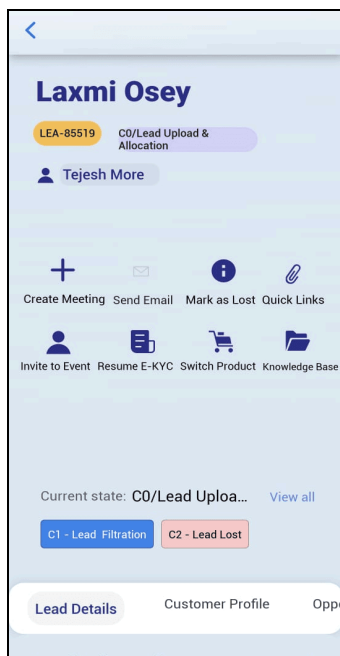
4. How to view or Use Lead 360.

In 360 view, you can see all the details of the lead.

- Click on lead on the lead tab of which you want to see details.



Lead 360 page will get opened as shown below.



- Here you can see the lead details in the Lead Details tab

Lead Details
Customer Profile
Oppor

Lead Information

Mobile 9772626373

Email -

Lead Stage C2

Lead Status -

Lead Source Self Generated

Lead Category Individual

Lead Profile -

Branch Thane

Branch Code ONLKNCHPDA

Product EQUITY + MFD

Interested Product -

Margin Amount Expected -

- Click on Customer Profile to see profile details

Lead Details
Customer Profile
Opportuni

Assets

What is the approximate value of your account? -

Do you own any investments (stocks, bonds, MF)? -

Do you own any real estate properties? -

Present vehicles (cars, bikes, etc.)? -

Investment Following Style -

Liabilities And Expenses

Do you have any outstanding loans? -

What are your monthly expenses? -

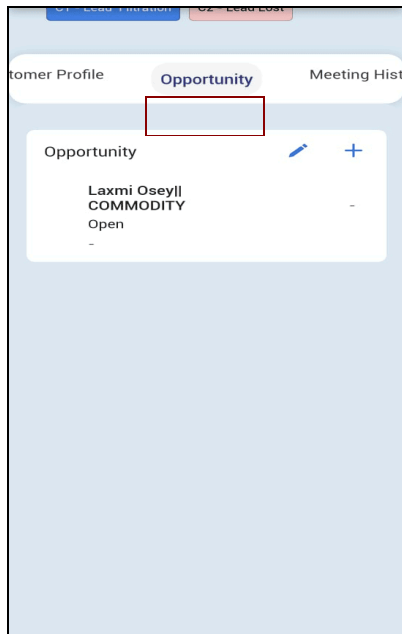
Do you have any investments or savings plan? -

Are there any other regular expenses? -

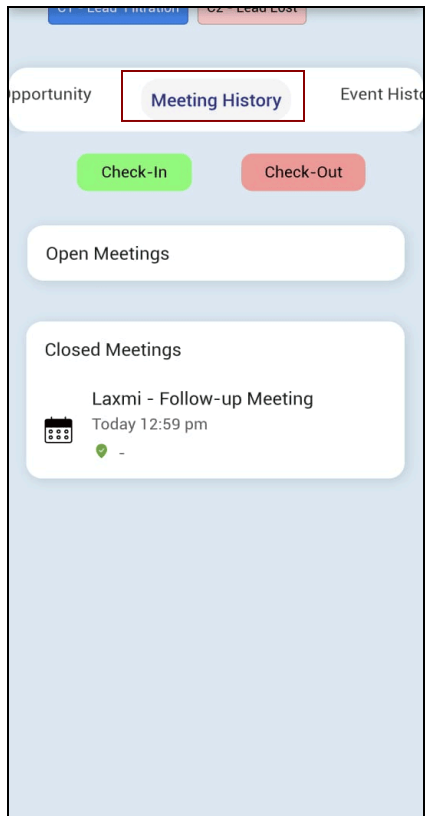
Your existing Portfolio size? (Cash + Holdings) -

Goals and Risk Tolerance

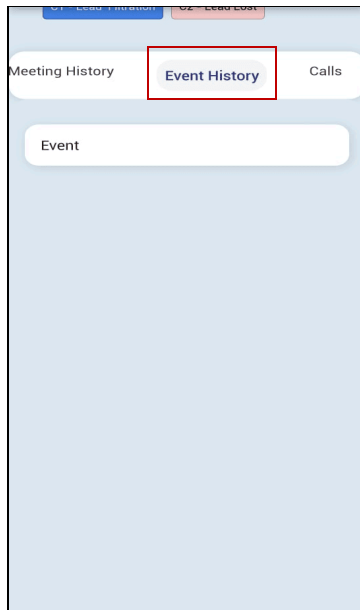
- For viewing opportunities, click on the Opportunities tab.



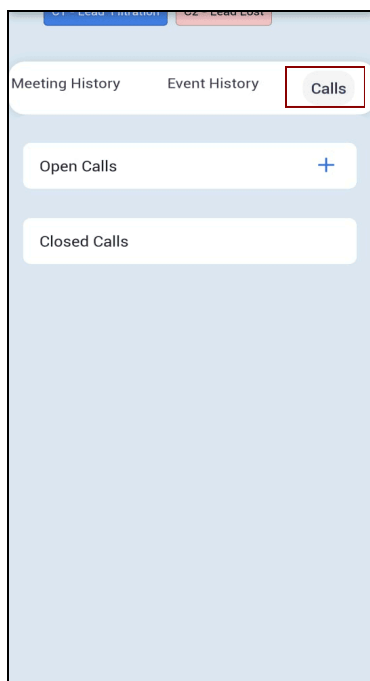
- For viewing meeting history, click on the Meeting History tab.



- For viewing Event history, click on the Event history tab.

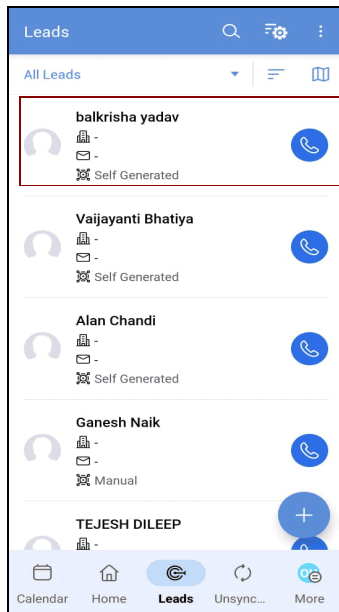


- For viewing call details, click on the tab Calls.

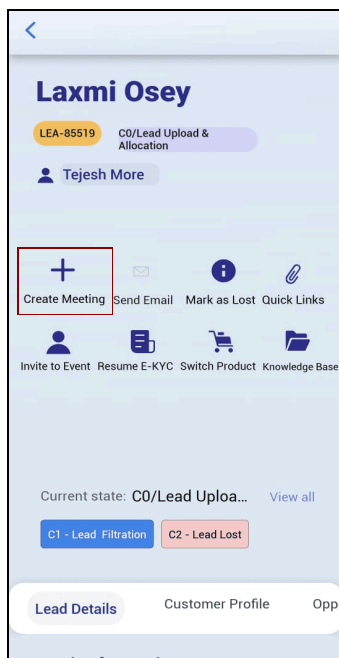


5. How to create Meeting

- Click on the lead whom you want to create a lead for.



- Click on Create Meeting

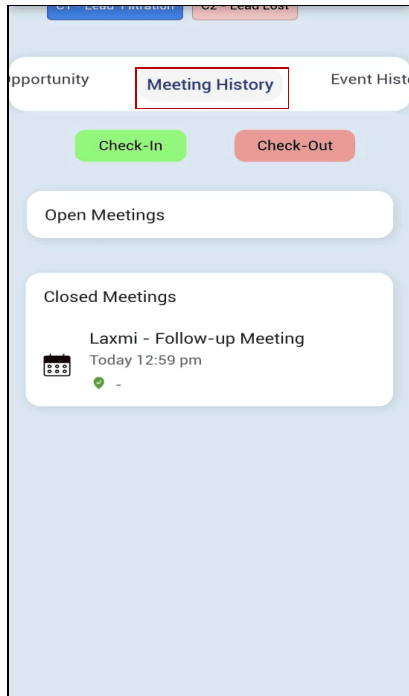


- Fill out required details in the form
- Click on the create button after filling the form.

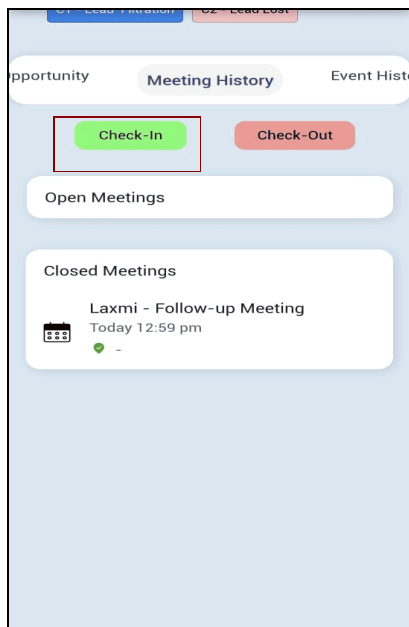
The screenshot shows a mobile application interface for creating a meeting. The title bar at the top is blue with a back arrow on the left and a refresh icon on the right. The form itself is light blue and contains several input fields, each with a red asterisk indicating it is required. The fields are: Meeting Date (with the value 31/12/2025), Activity Type (a dropdown menu showing 'None'), Start Time, End Time, Host (with the value Tejesh More), and Meeting Reason (a dropdown menu showing 'None'). At the bottom of the form is a blue button labeled 'Create', which is highlighted by a red rectangular box. To the right of the 'Create' button is a grey slider control with a minus sign on the left and a plus sign on the right.

6. How to check in for a meeting and check out from a meeting.

- On the Lead 360 page, go to the Meeting History tab.



- For check-in click on check-in button.



- After clicking on check-in you need to validate the OTP then click on verify and Check-in .

Meeting Check-In

Meeting Found!

Generated OTP:

947453

Enter OTP to Check-in:

Enter 6-digit OTI

Verify & Check-in Refresh OTP

Refresh available in 26 seconds

- For check out, click on check out button.

Meeting History

Check-In Check-Out

Open Meetings

Closed Meetings

Laxmi - Follow-up Meeting

Today 12:59 pm

- After clicking on Check-Out fill the form and tap on submit button.

Meeting Check-Out

Client Feedback *

None ^

Interested Products *

Select products...

Notes *

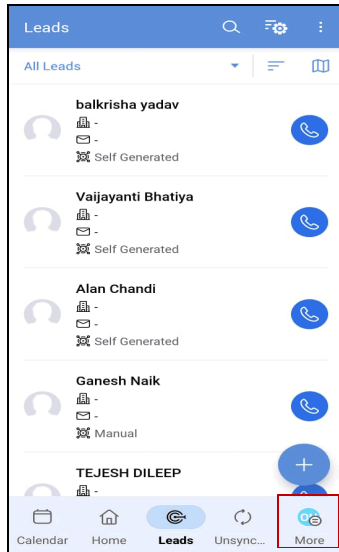
Enter your notes

Submit

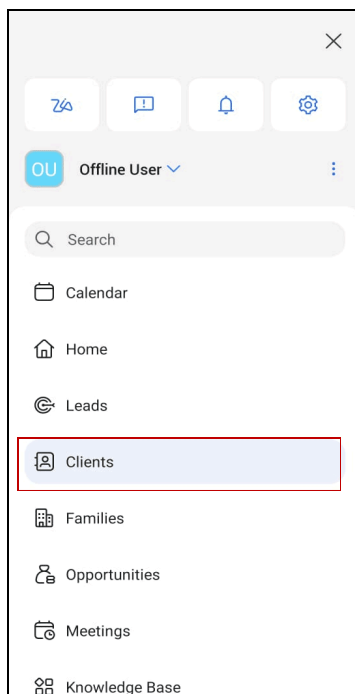
7. Customer 360

How to see client details.

- Click on the More tab below.



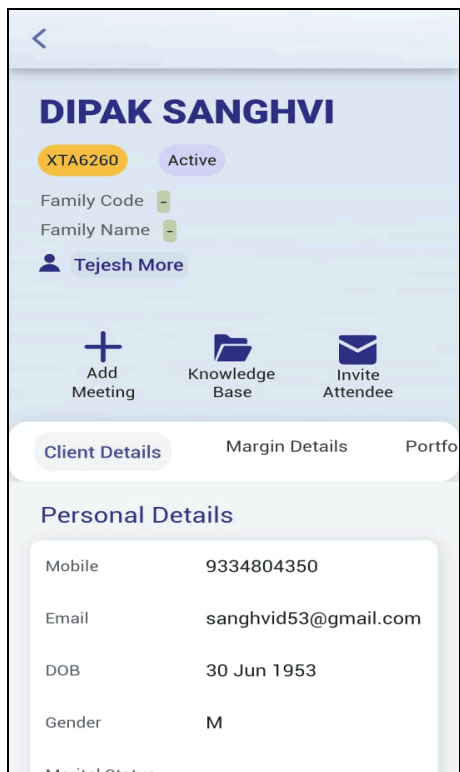
- Now search for clients and select the Client tab



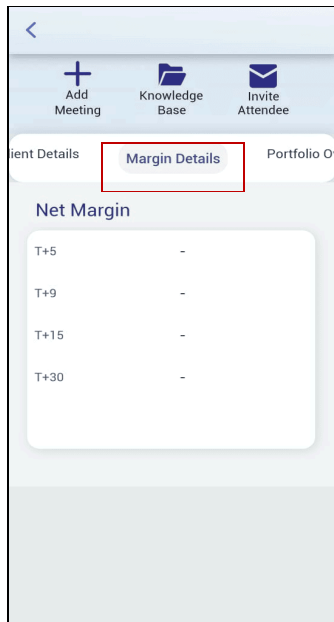
- Click on the clients whom you want to see details



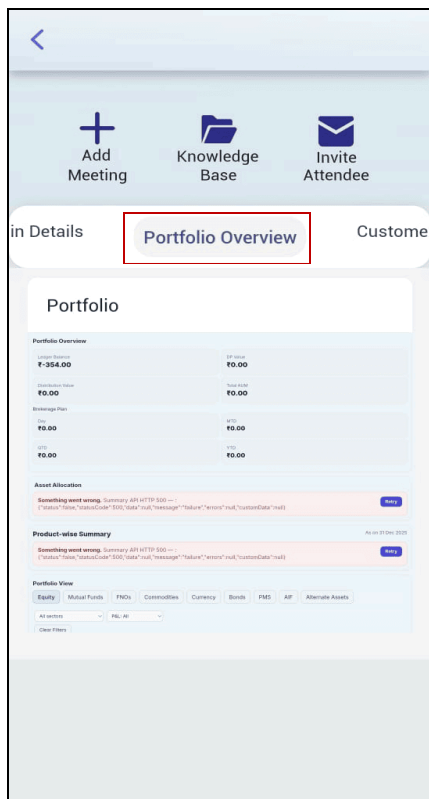
- After clicking on the client, the Customer 360 page will get opened.
- Here you see all the details related to the clients.



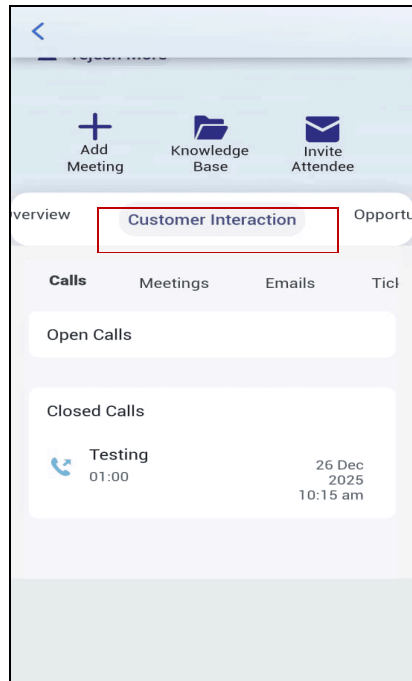
-
- For margin details, click on Margin Details tab.



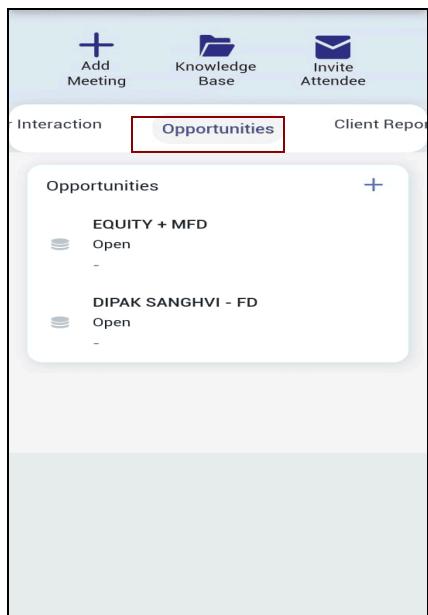
- For viewing portfolio, click on the tab Portfolio Overview.



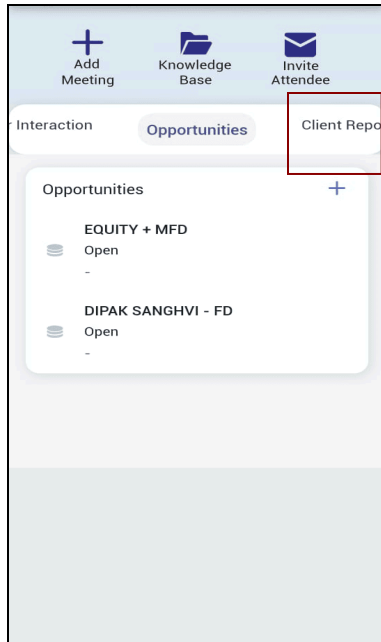
- Click on the Customer Interaction tab to view the previous interactions.
- Here you see calls, meetings, sent emails, and tickets that has been done previously.



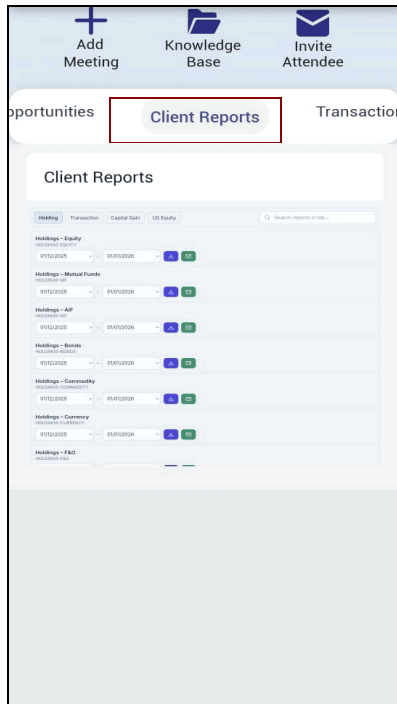
- Click on the Opportunities tab to view the opportunity related to the client.



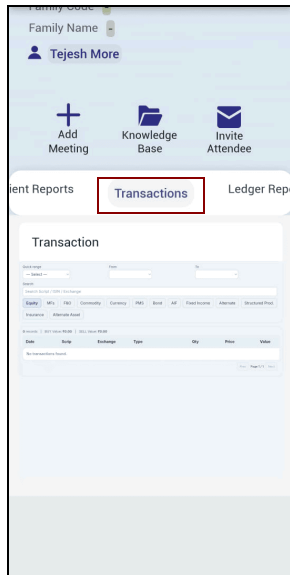
- You can also add opportunities from opportunities tab by clicking on the Plus symbol.



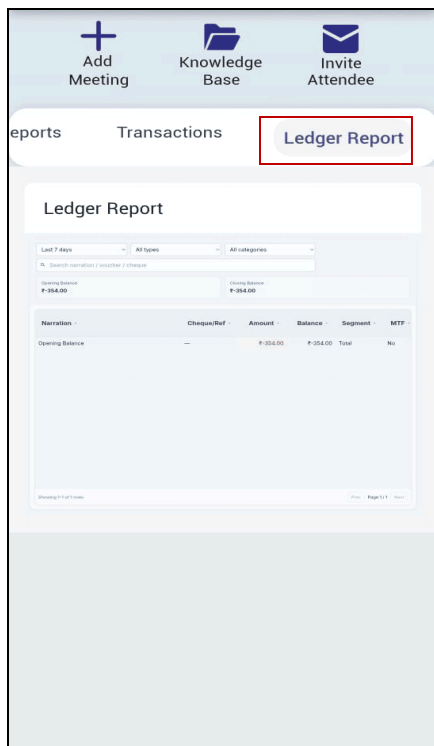
- Click on Client Reports tab for viewing the client reports.



- You can also download reports from here by clicking the download button.
- Click on the Transactions tab to view transactions.

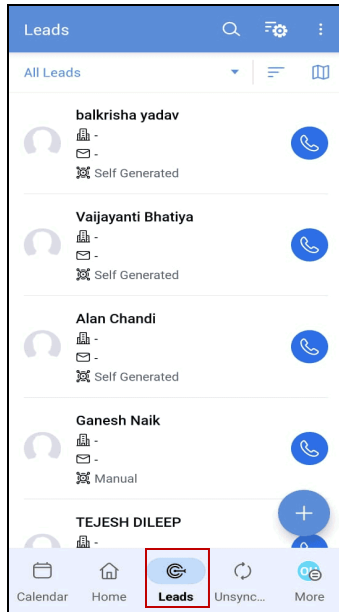


- Click on the Ledger Report tab to view the ledger report.

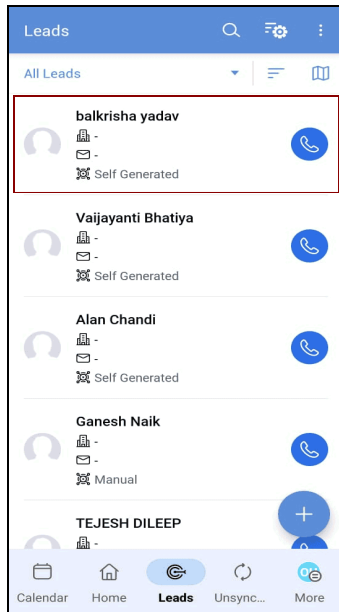


8. How to invite leads to an event

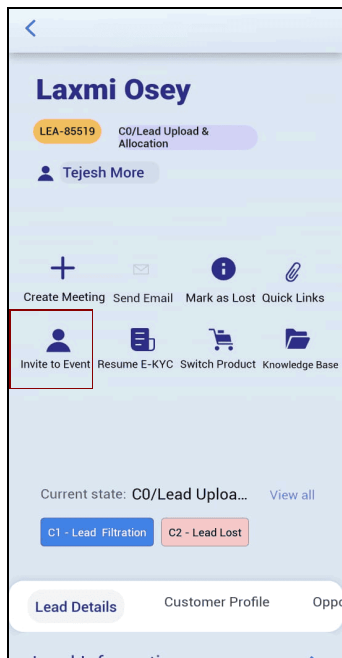
- Click on leads Module.



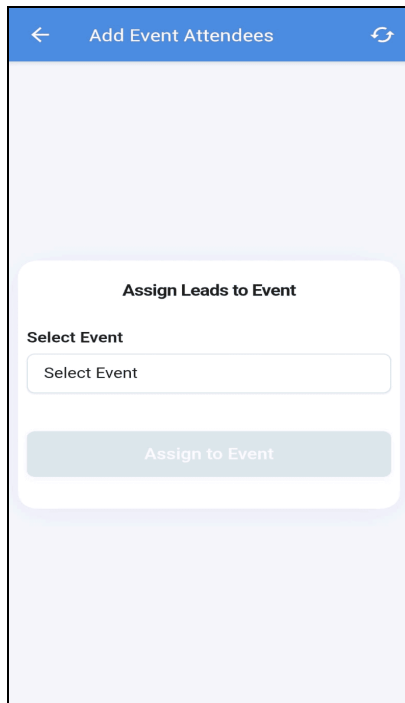
- Click on the lead name whom to invite.



- Click on the Invite to Event tab.



- Select the event from the dropdown menu.



- Click on Assign to Event.

←

Add Event Attendees

↺

Assign Leads to Event

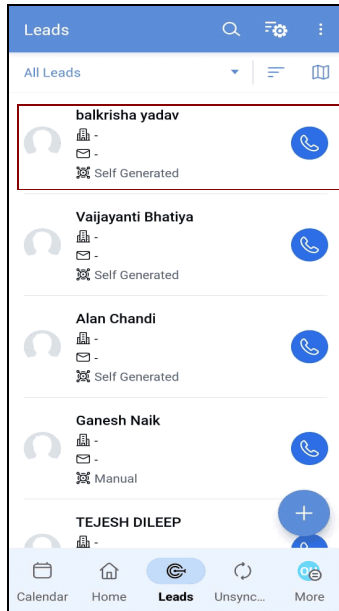
Select Event

new year celebration (6 / 100 attendees)

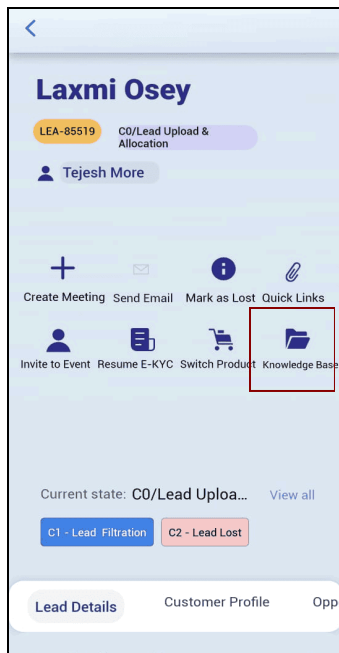
Assign to Event

9. How to share knowledge base

- Click on Lead whom to want to share Knowledge base.



- Click on the Knowledge base tab.



- Select the knowledge base that you want to share.
- You can filter the knowledge base by its type, External, Internal, FAQ or you can search it by name through the search bar and you can also filter it through tags Bonds, Brokerage, E-KYC, Investment, and research through the filter tab then click on the send button.

←

Knowledge Base

↺

External

Internal

FAQ

Search...

▼

Tags

	Title	Description	Tags	Attachment Type
<input type="checkbox"/>	Compliance & KYC		Investment	excel
<input type="checkbox"/>	Support Desk		Brokerage	pdf
<input type="checkbox"/>	Trading Platform Help		Investment	excel
<input type="checkbox"/>	Fund Management		Investment	pdf
<input type="checkbox"/>	Brokerage & Charges		Brokerage Investment	pdf
<input type="checkbox"/>	Compliance & KYC		Brokerage	excel
<input type="checkbox"/>	Brokerage &		Brokerage	

Prev

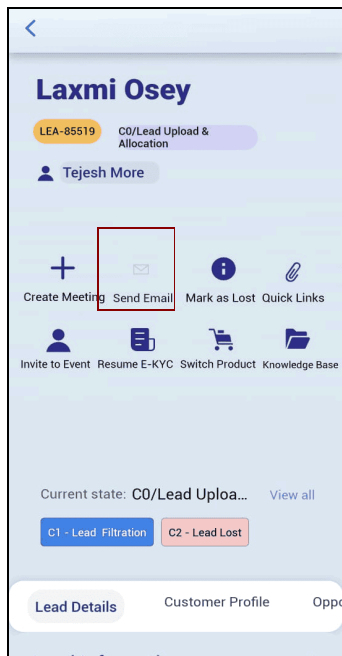
Page 1 of 1

Next

➤ Send

10. How to send Email from Lead 360.

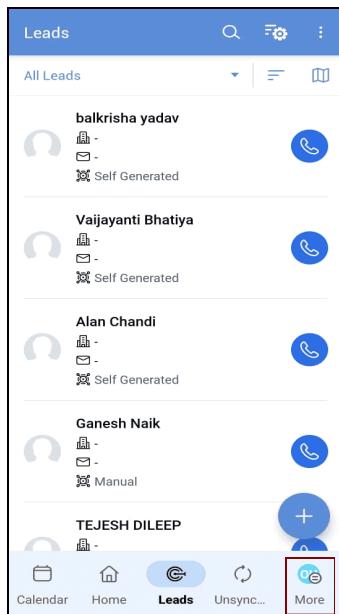
- Click on the Send Email tab.



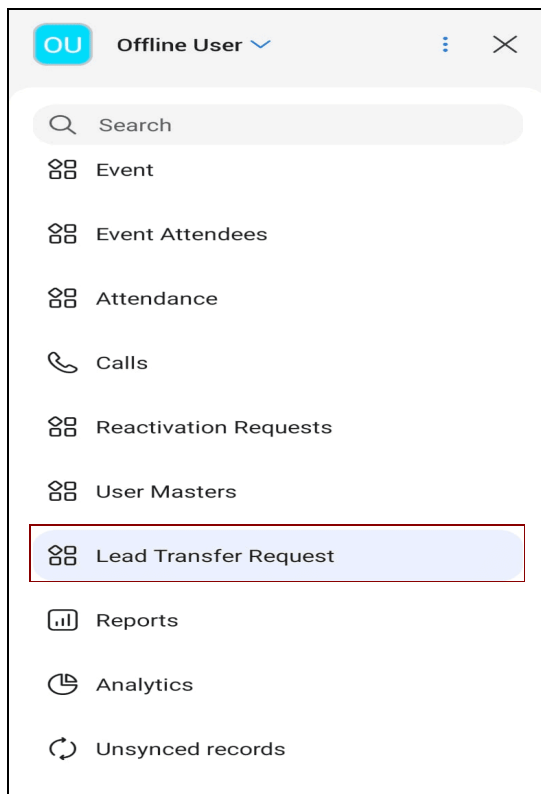
- Write your mail here or you can select a prebuilt template from insert template button.

11. How to create a Lead transfer Request.

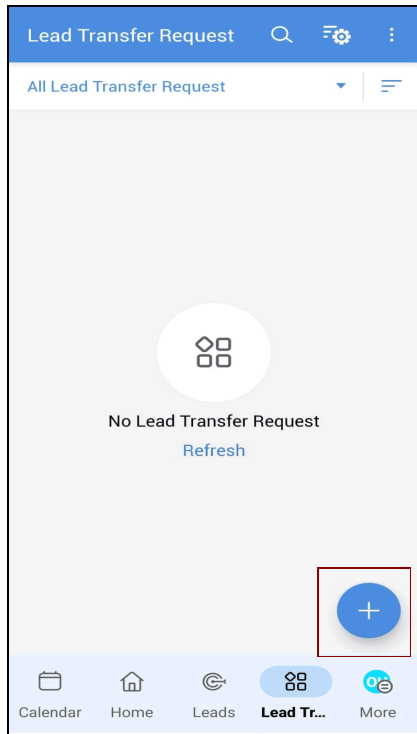
- Click on the More tab in the bottom right corner.



- Search for the Lead Transfer Request module and click on it.



- Click on the Plus Icon on the bottom of the right corner.

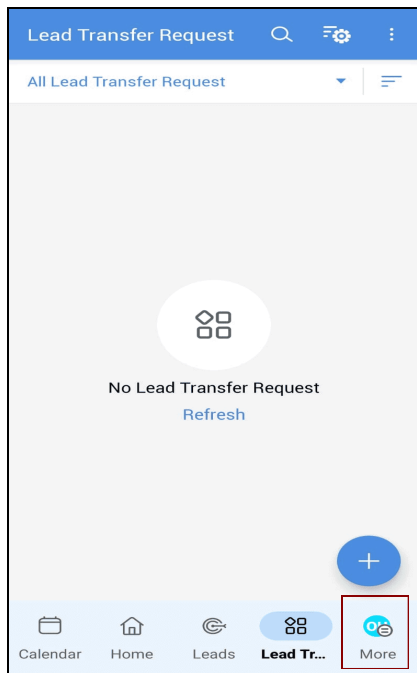


- Enter the Phone number and Reason for transfer and click on the Tick symbol on the top right corner.

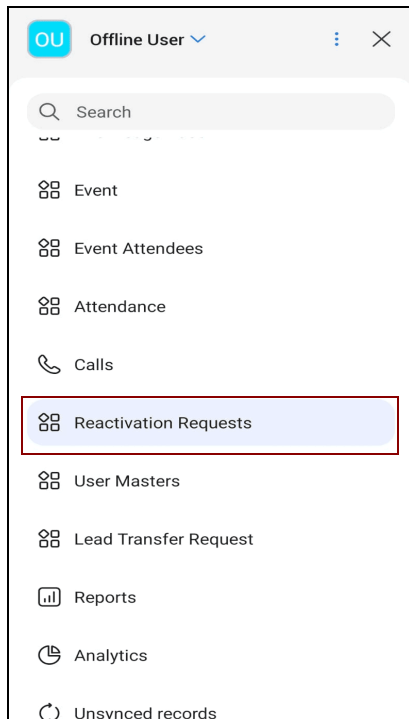
A screenshot of the 'Add Lead Transfer Request' form. The top bar is blue with a back arrow on the left, the title 'Add Lead Transfer Request' in the center, and a dropdown menu showing 'Standard' on the right. A red box highlights the top right corner, specifically the area around the dropdown menu and a checkmark icon. The form contains four input fields: 'Mobile Number', 'Transfer Reason', 'Request Status' (which has a radio button selected for 'Pending' and a right-pointing chevron), and 'Lead Name'. At the bottom of the form, there is a link that says 'Show all fields'.

12. How to make a Reactivation Request

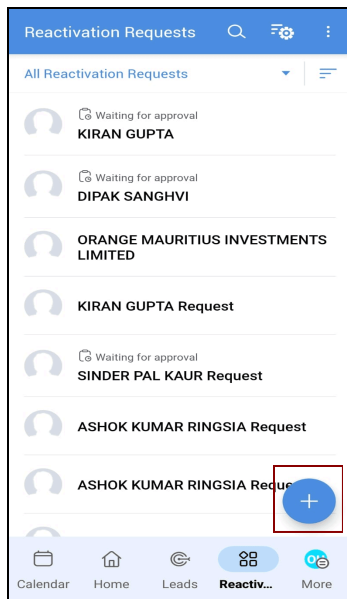
- Click on the more tab and search for Reactivation Request.



- Click on Reactivation Request.



- Click on the plus icon on bottom right corner.



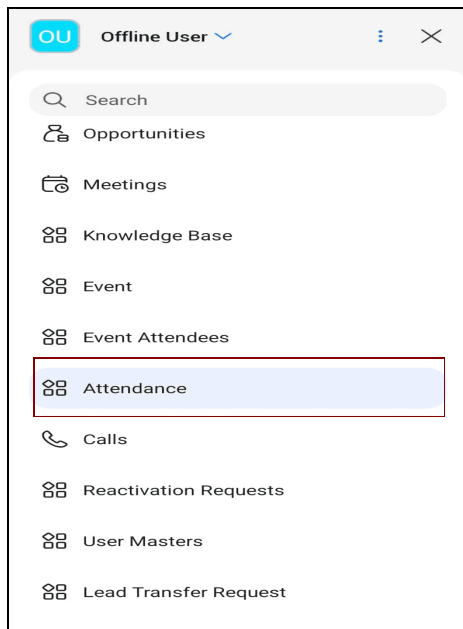
- Enter the Client Code of the user for whom you want to activate, Select request type and and Enter Reactivation Request Name then click on Tick symbol.

* Client code	
* Request Type	-None- >
* Reactivation Request Name	
Reactivation Request Owner	Tejesh More >

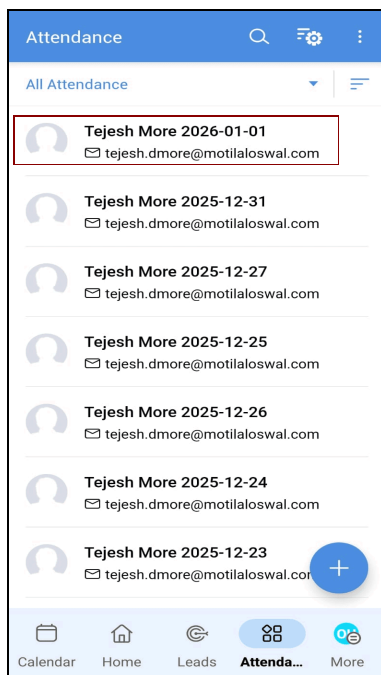
Show all fields

13. How to mark Attendance

- Click on the More tab Search for Attendance Module and click on it.



- Click on the date for marking attendance.



- Click on Login for marking Attendance.

[<](#)

Login

Logout

Login Information

Login DateTime

Today 11:14 am

Login Address

Unit No-301,
3rd Floor, A
Wing, Interface
Building No-16, B,
Mindspace, Malad
West, 302, Interface
16 Rd, Malad,
Mindspace, Malad
West, Mumbai,
Maharashtra
400064, India

Login Latitude

19.1851650526249
46

Login Longitude

72.8298532273994
7

Logout DateTime

-

Logout Address

-



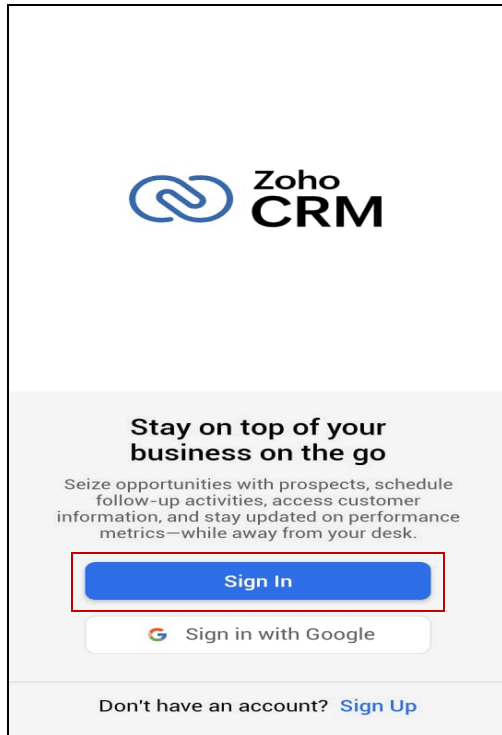
Zoho CRM User Guide for Retail User



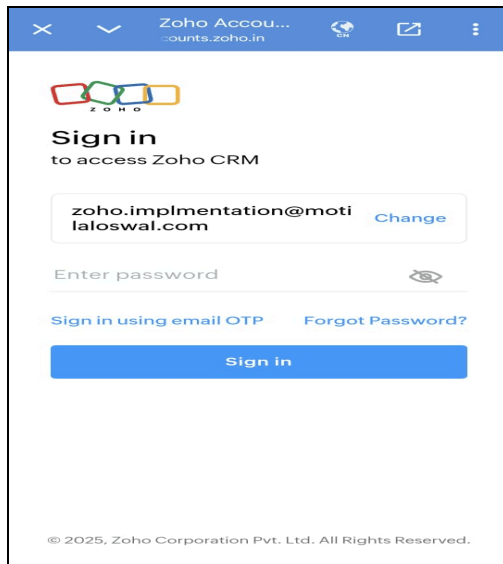
1. How to login to mobile

Story: As I want to login to Zoho CRM to my Mobile

- Download Zoho CRM App in your device
- Open CRM App
- You will see a welcome page
- Click on Sign In

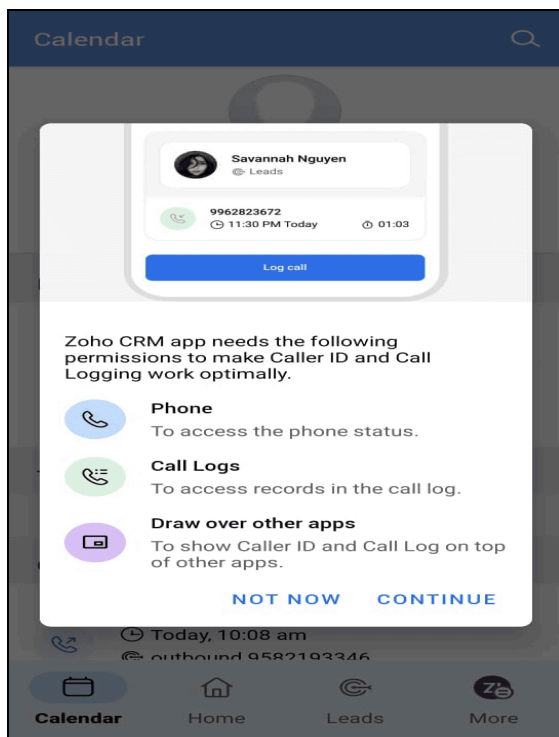


- Enter your Credentials Email and Password

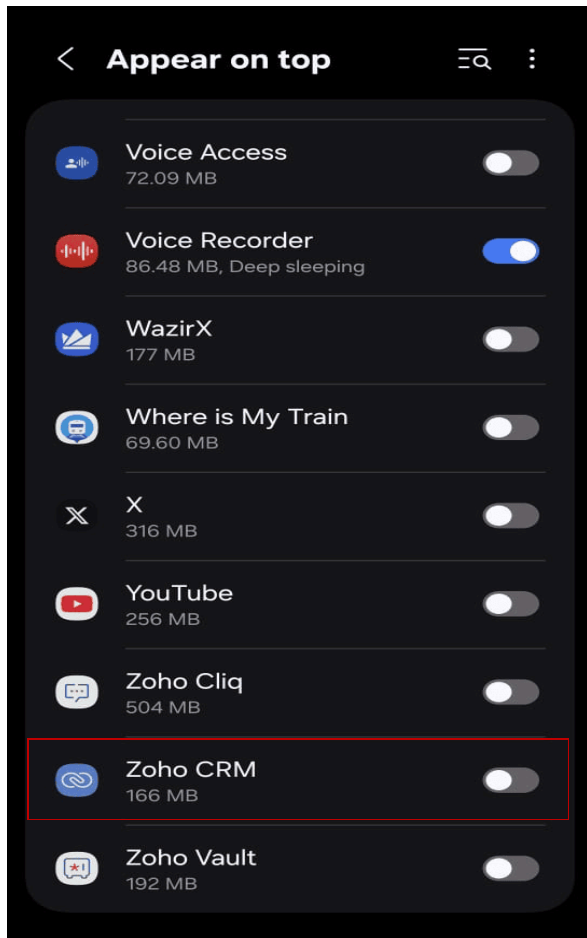


The image shows the Zoho CRM sign-in interface. At the top, there's a browser address bar with 'Zoho Account...' and 'accounts.zoho.in'. Below it is the Zoho logo. The main heading is 'Sign in to access Zoho CRM'. There's a text input field for the email address, which contains 'zoho.implmentation@moti' and 'laloswal.com', with a 'Change' link next to it. Below the email field is a password input field with the placeholder text 'Enter password' and an eye icon to toggle visibility. There are two links: 'Sign in using email OTP' and 'Forgot Password?'. A large blue 'Sign in' button is at the bottom. At the very bottom, there's a copyright notice: '© 2025, Zoho Corporation Pvt. Ltd. All Rights Reserved.'

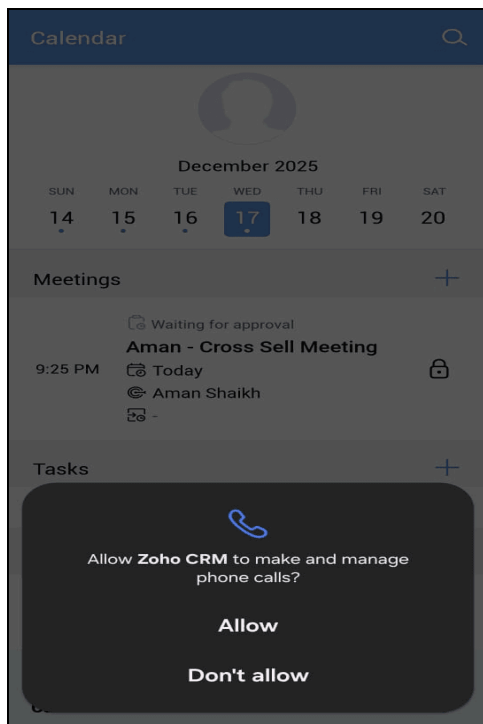
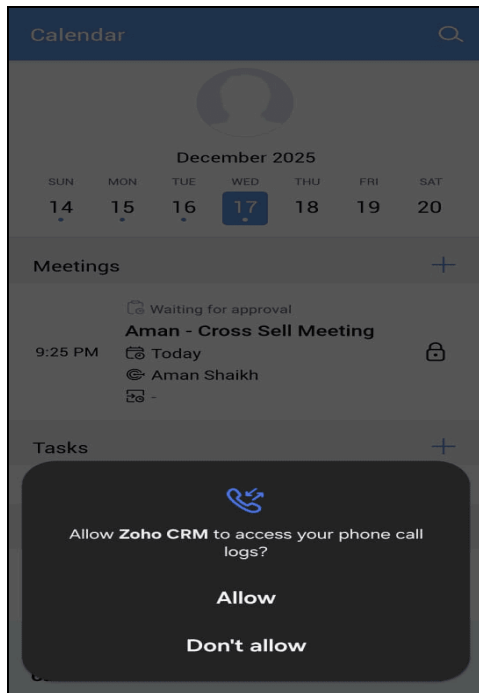
- Give the required permission as asked by the app



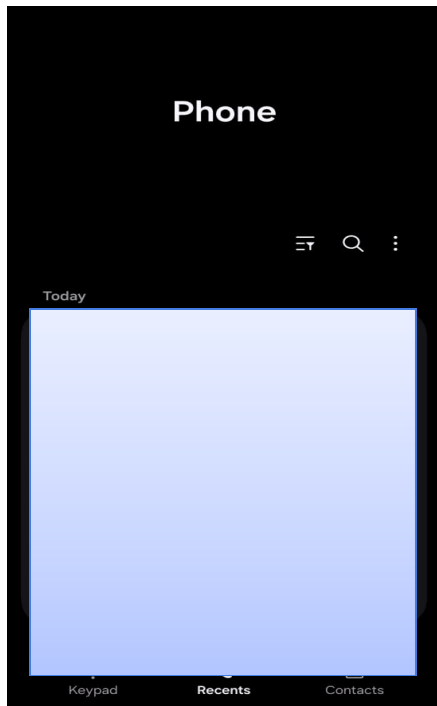
- Enable the the Appear on top for CRM from your device setting



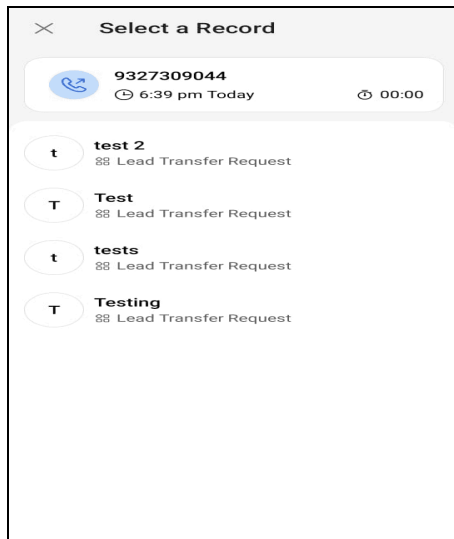
- Give required permissions



- Then go to your device calling app and make call



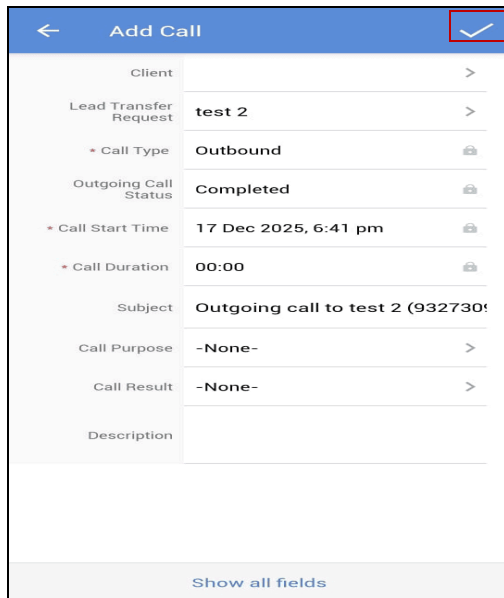
- After Disposing the call, you will get a pop up to select a lead to that number if the lead has created already.
- Select the lead if exist.



The screenshot shows a 'Select a Record' dialog box. At the top, there is a header with a close button (X) and the title 'Select a Record'. Below the header, there is a section for the current record, displaying a phone icon, the number '9327309044', the time '6:39 pm Today', and a duration '00:00'. Below this, there is a list of four leads, each with a circular icon containing a letter and the lead name followed by 'Lead Transfer Request':

- t test 2** 88 Lead Transfer Request
- T Test** 88 Lead Transfer Request
- t tests** 88 Lead Transfer Request
- T Testing** 88 Lead Transfer Request

- After that a screen will pop up for call disposition detail
- Enter the required details and tap on the Tick mark

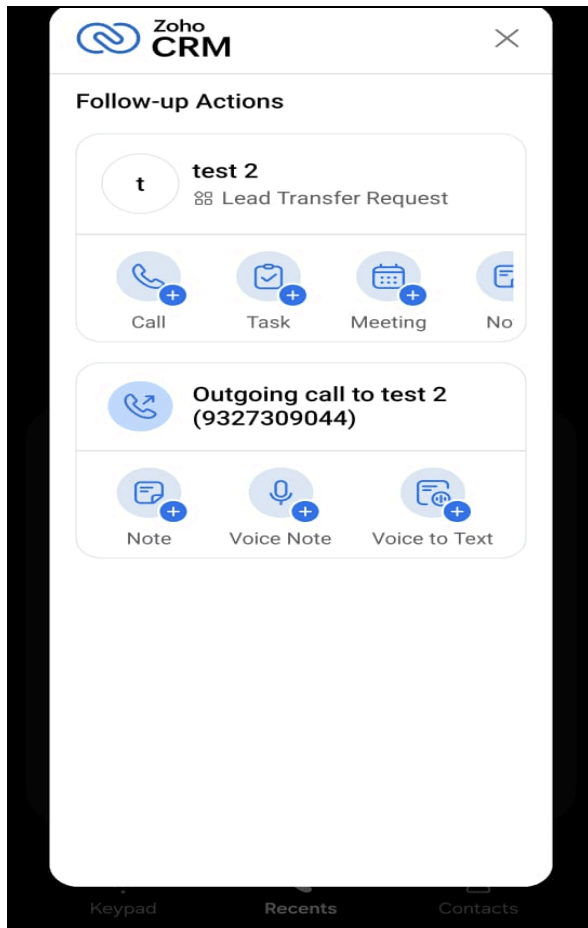


The screenshot shows an 'Add Call' form. The title bar is blue with a back arrow on the left and a tick mark icon on the right. The form contains the following fields:

- Client**: >
- Lead Transfer Request**: test 2 >
- * Call Type**: Outbound 📞
- Outgoing Call Status**: Completed 📞
- * Call Start Time**: 17 Dec 2025, 6:41 pm 📞
- * Call Duration**: 00:00 📞
- Subject**: Outgoing call to test 2 (932730...
- Call Purpose**: -None- >
- Call Result**: -None- >
- Description**: (empty text area)

At the bottom of the form, there is a button labeled 'Show all fields'.

- After that a page of follow action will pop up from here you can create upcoming tasks like calls, meeting or add notes



2. How to check call log on Web CRM

- Go to calls section you can see all your call logs which you have made from your device

The screenshot displays the 'Calls' section of a Web CRM. The interface includes a sidebar with navigation options, a top bar with filters and actions, and a main table displaying call logs. The 'Calls' section is selected in the sidebar, and the 'Filter Calls by' panel is open, showing system-defined filters and filter-by-fields.

Filter Calls by

Search

System Defined Filters

- ☐ Touched Records
- ☐ Untouched Records
- ☐ Record Action
- ☐ Related Records Action

Filter By Fields

- ☐ Agami Call Status
- ☐ Agami Notes
- ☐ Agent Email
- ☐ Agent Number
- ☐ Agent Ringing Time
- ☐ Business_Unit
- ☐ Call Agenda
- ☐ Call Back Disposition
- ☐ Call Direction

Table Data:

<input type="checkbox"/>	Subject	Related To	Call Type	Call Start Time	
<input type="checkbox"/>	Outbound Call from 9228823545	AJAY	Outbound	17/12/2025 06:40 PM	00
<input type="checkbox"/>	Outbound Call from 2241860088	ARVIND PANWAR	Outbound	17/12/2025 06:40 PM	00
<input checked="" type="checkbox"/>	Outgoing call to test 2 (9327309044)	test 2	Outbound	17/12/2025 06:39 PM	00
<input type="checkbox"/>	Outbound Call from 9228823545	PANCHANAN BISWAS	Outbound	17/12/2025 06:39 PM	00
<input type="checkbox"/>	Outbound Call from 2241860088	CHANDRIKA PRASAD	Outbound	17/12/2025 06:39 PM	00
<input type="checkbox"/>	Outbound Call from 9228823545	MAMLESHWAR KAUSHIK	Outbound	17/12/2025 06:37 PM	00
<input type="checkbox"/>	Outgoing call to MAMLESHWAR KAUSHIK (8502915950)	MAMLESHWAR KAUSHIK	Outbound	17/12/2025 06:37 PM	00
<input type="checkbox"/>	Outbound Call from 9228823545	SHAMBHAVI SHRIPAD KULKARNI	Outbound	17/12/2025 06:35 PM	00
<input type="checkbox"/>	Outgoing call to		Outbound	17/12/2025 06:35 PM	00