FRISTINE INFOTECH

DIGITAL SYNERGY VENTURES GROUP

ZOHO Premium Partner

Zoho CRM User Guide for Mobile Retail

motilal oswal

- QR Code for Installation of CRM App

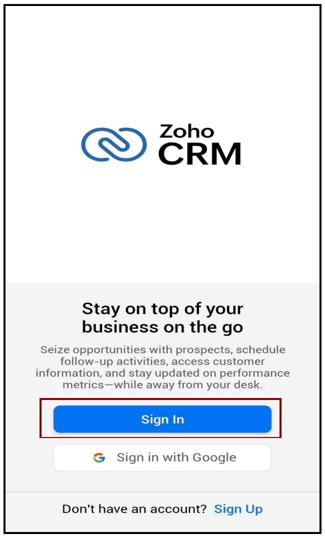
Android

IOS

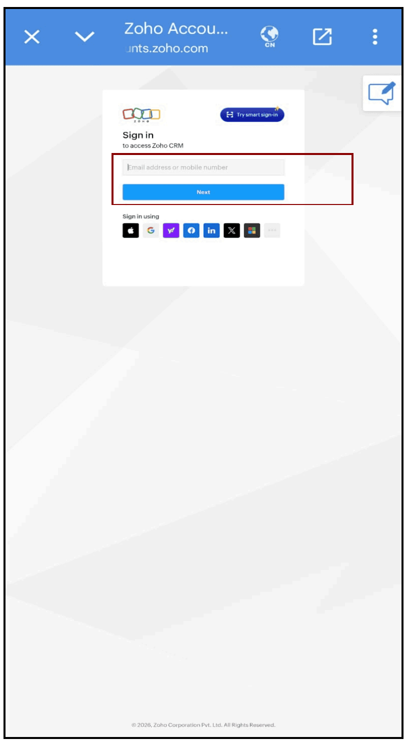
- QR code for Dista app IOS and Android

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.

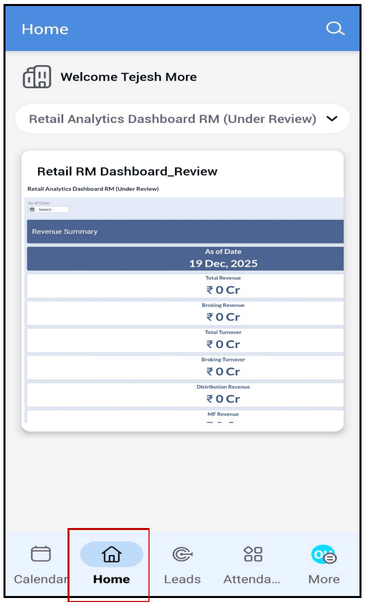


- Enter the Login Credentials and click on sign in button.

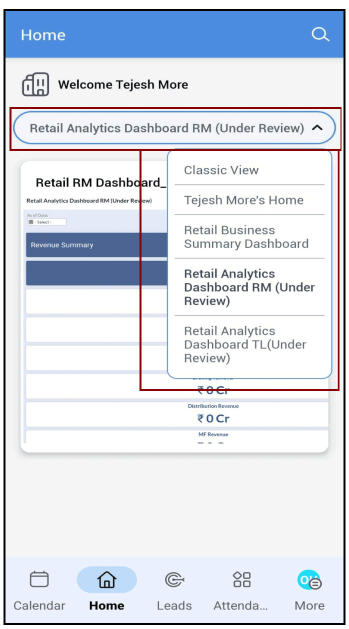
- After login you will get redirected to One Auth page, here you have enter otp or verify it by Zoho Oneauth app.

2. How to View Dashboards

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



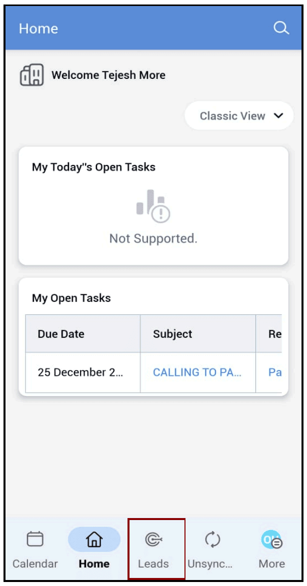
- Click on the bar for change dashboard View and select the view.



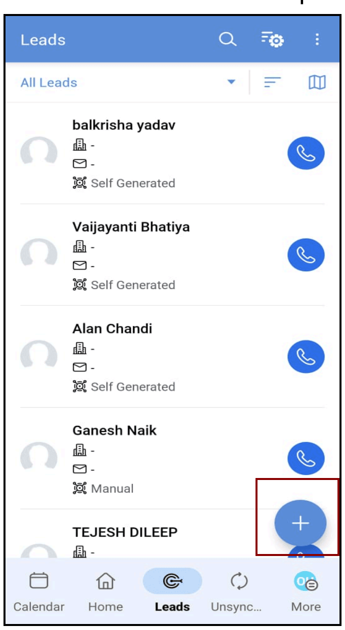
3. How to create Lead

After Logging in you will get redirected to the Home page

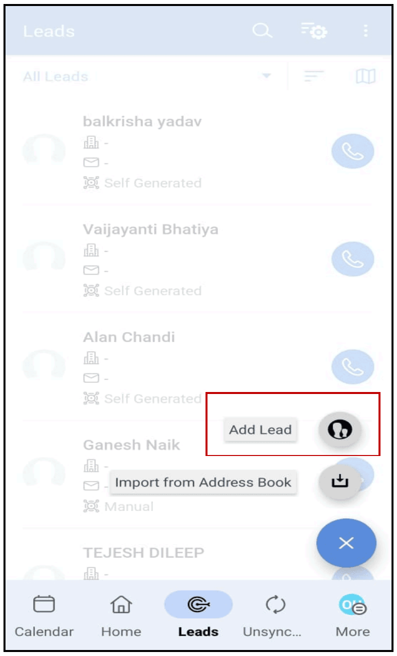
- Click on the leads tab



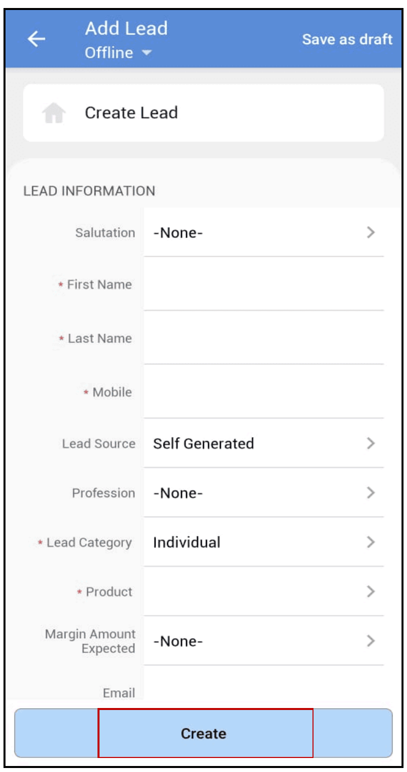
- Click on the plus Icon on the bottom of the right corner.



- Click on Add Lead.



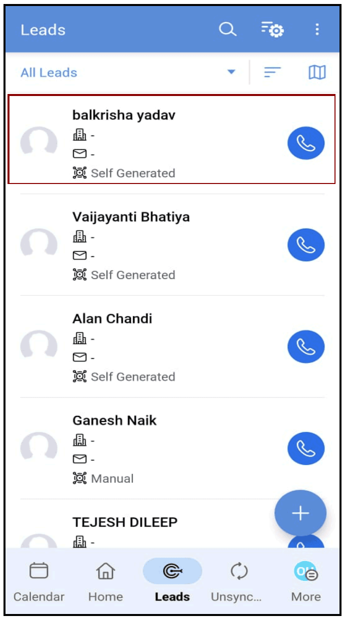
- Now fill out all the fields as required in the form.
- Click on Create.



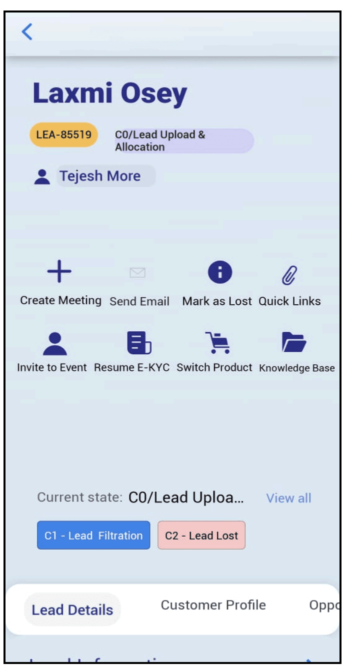
4. How to view or Use Lead 360.

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

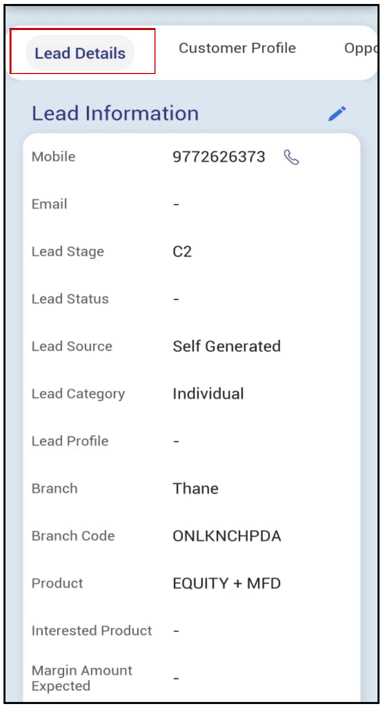
- Click on lead on the lead tab of which you want to see details.



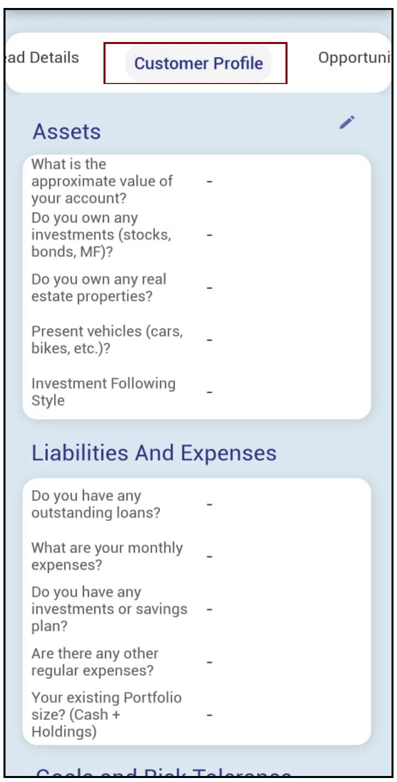
Lead 360 page will get opened as shown below.



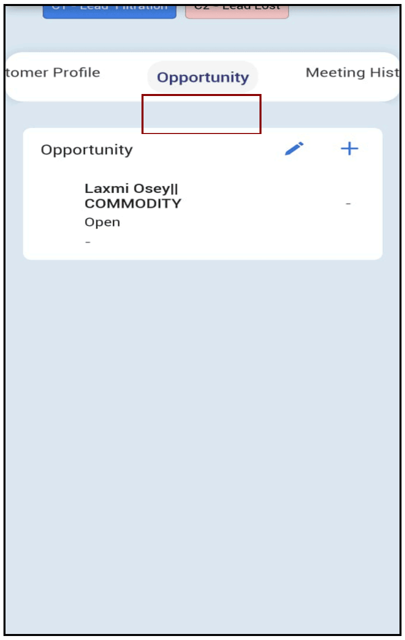
- Here you can see the lead details in the Lead Details tab



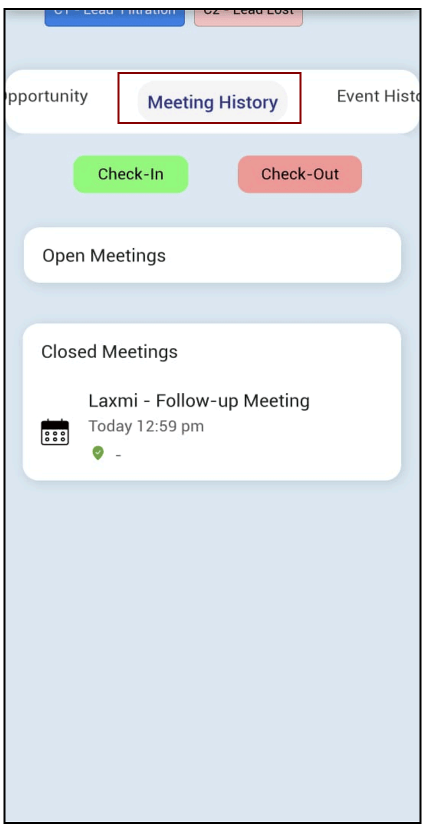
- Click on Customer Profile to see profile details



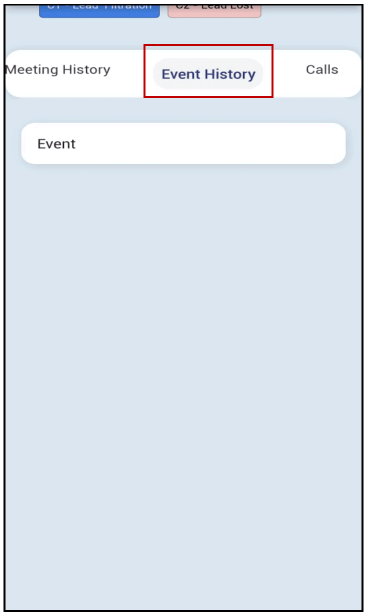
- For viewing opportunities, click on the Opportunities tab.



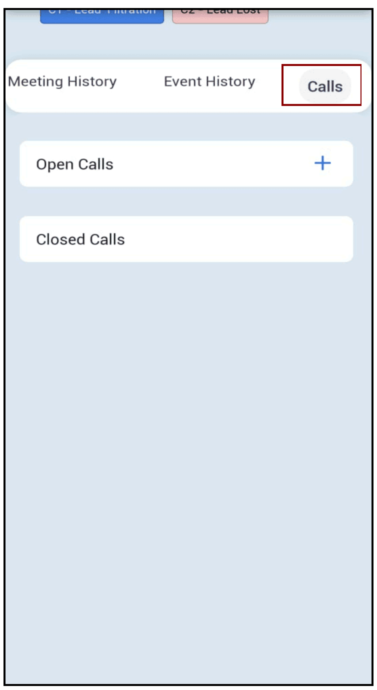
- For viewing meeting history, click on the Meeting History tab.



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

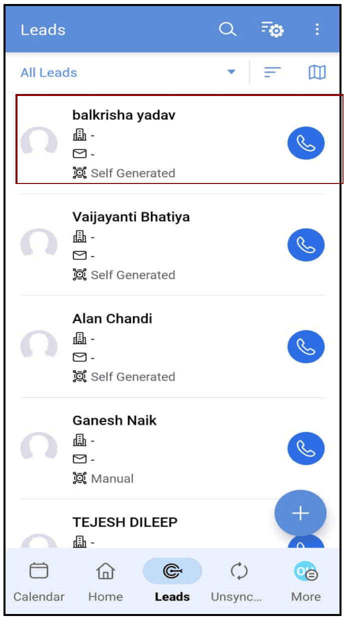


- For viewing call details, click on the tab Calls.

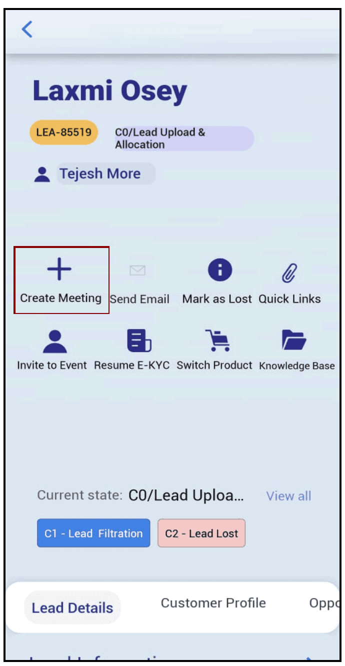


5. How to create Meeting

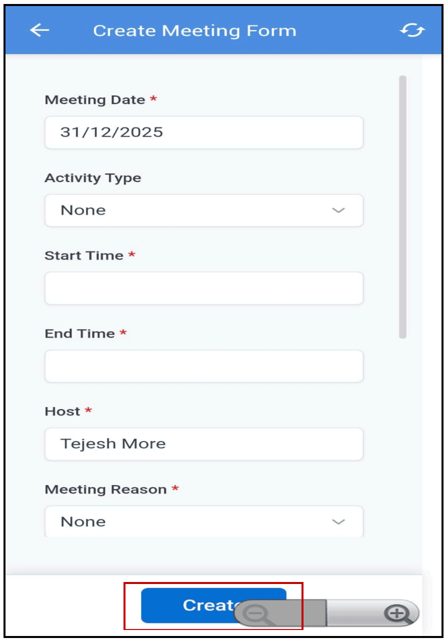
- Click on the lead whom you want to create a lead for.



- Click on Create Meeting

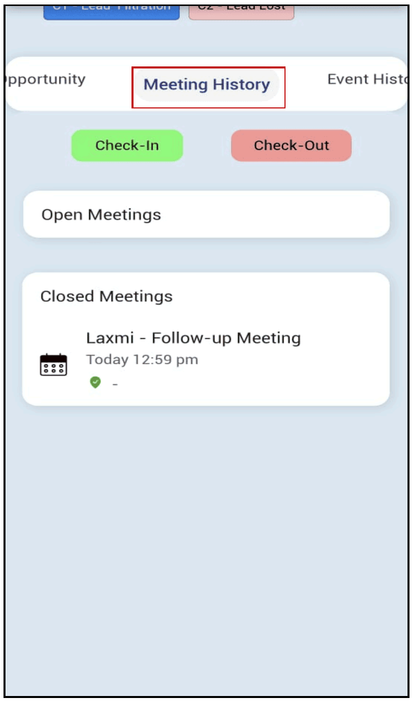


- Fill out required details in the form
- Click on the create button after filling the form.

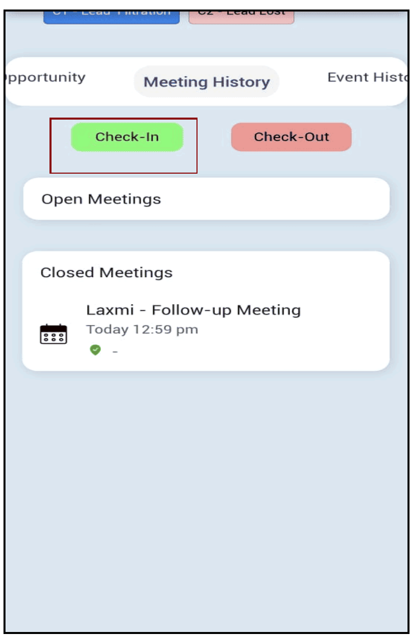


6. How to check in for a meeting and check out from a meeting.

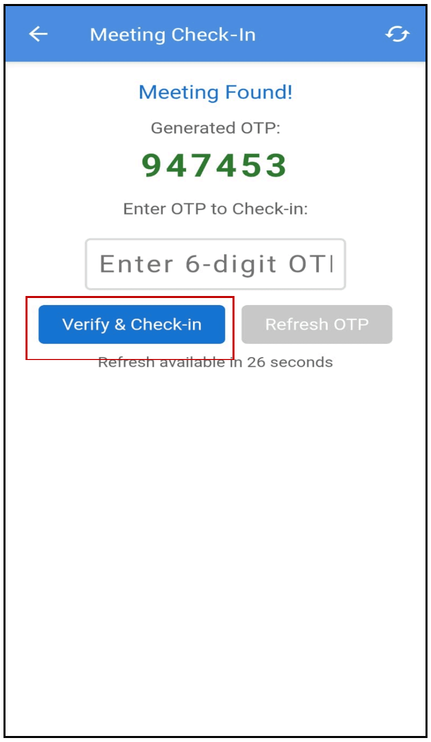
- On the Lead 360 page, go to the Meeting History tab.



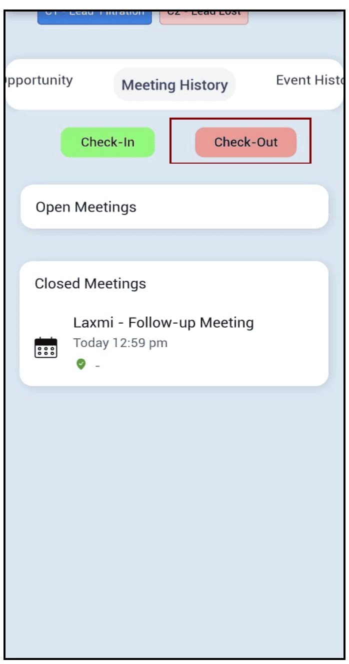
- For check-in click on check-in button.



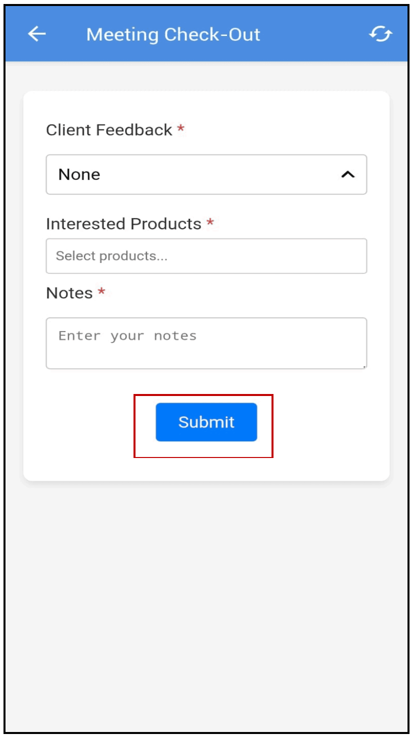
- After clicking on check-in you need to validate the OTP then click on verify and Check-in .



- For check out, click on check out button.



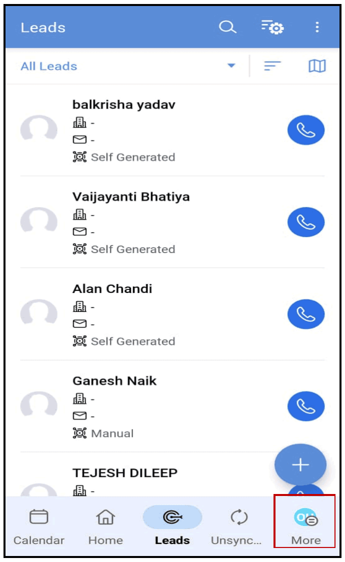
- After clicking on Check-Out fill the form and tap on submit button.


Meeting Check-Out
Client Feedback *
None
Interested Products *
Select products...
Notes *
Enter your notes
Submit

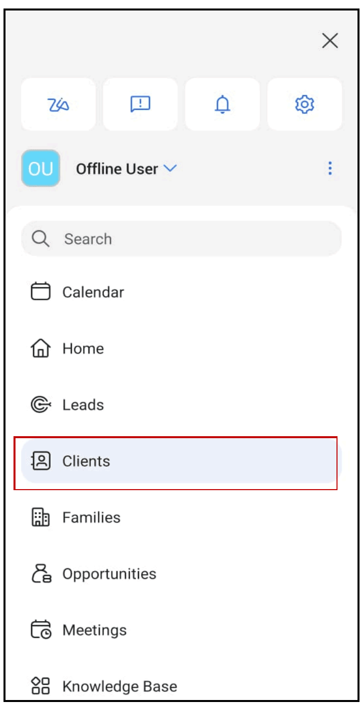
7. Customer 360

How to see client details.

- Click on the More tab below.

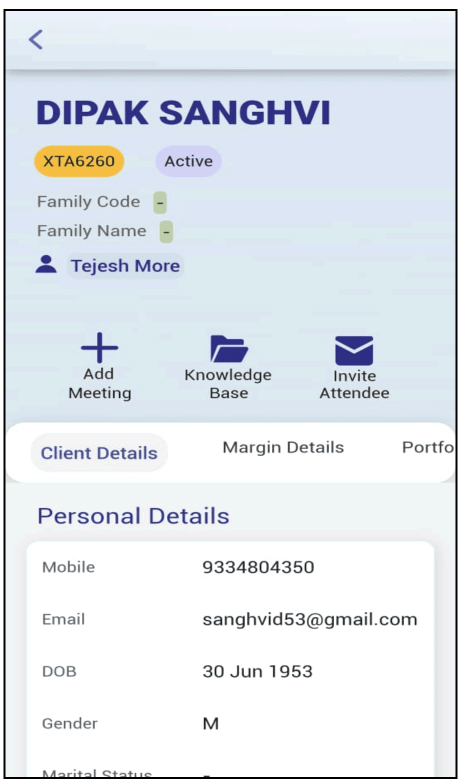


- Now search for clients and select the Client tab

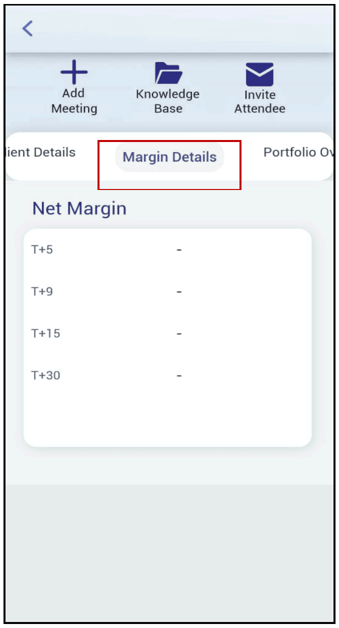


- Click on the clients whom you want to see details

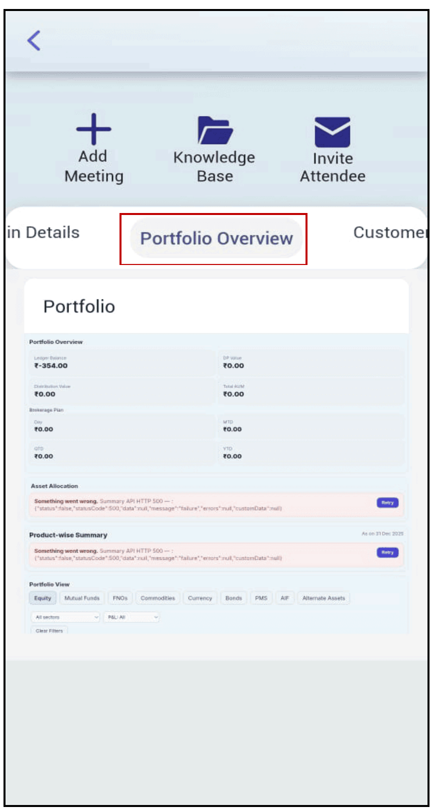
- After clicking on the client, the Customer 360 page will get opened.
- Here you see all the details related to the clients.



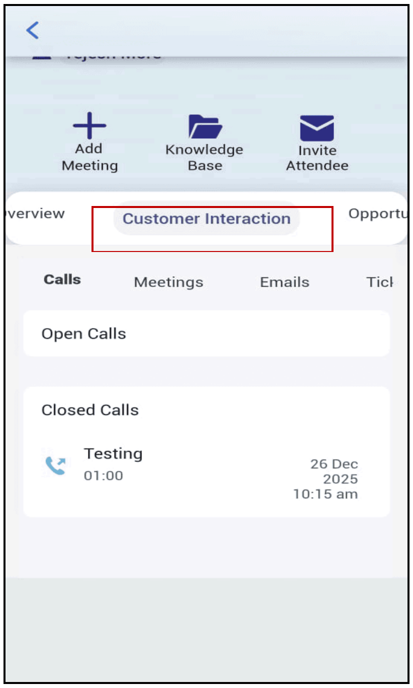
-
- For margin details, click on Margin Details tab.



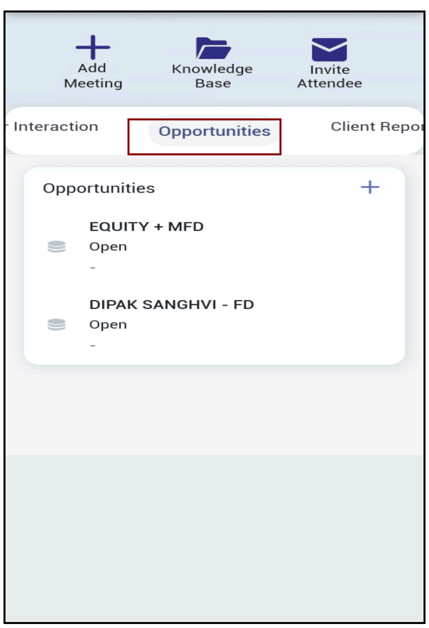
- For viewing portfolio, click on the tab Portfolio Overview.



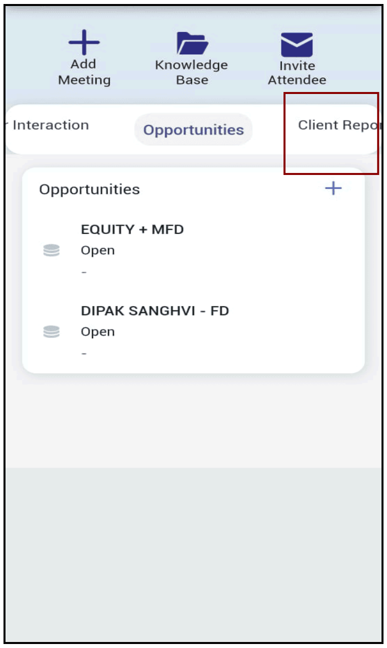
- Click on the Customer Interaction tab to view the previous interactions.
- Here you see calls, meetings, sent emails, and tickets that has been done previously.



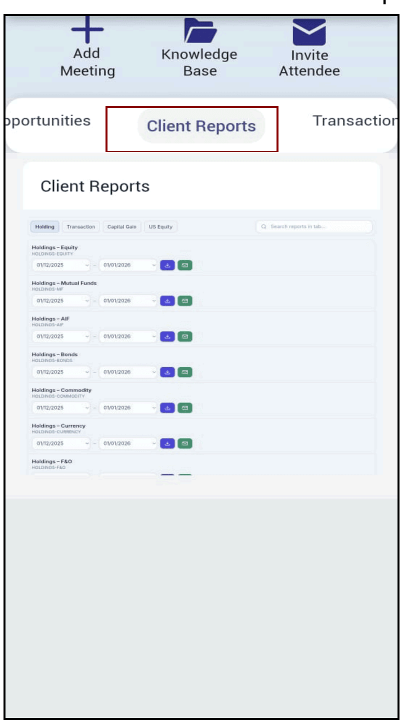
- Click on the Opportunities tab to view the opportunity related to the client.



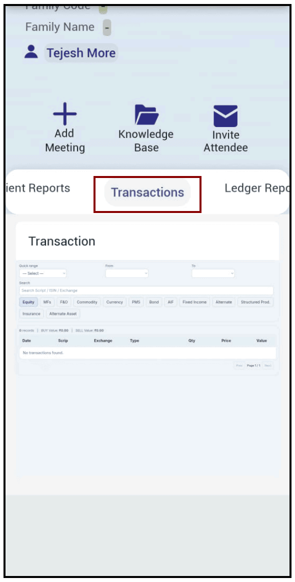
- You can also add opportunities from opportunities tab by clicking on the Plus symbol.



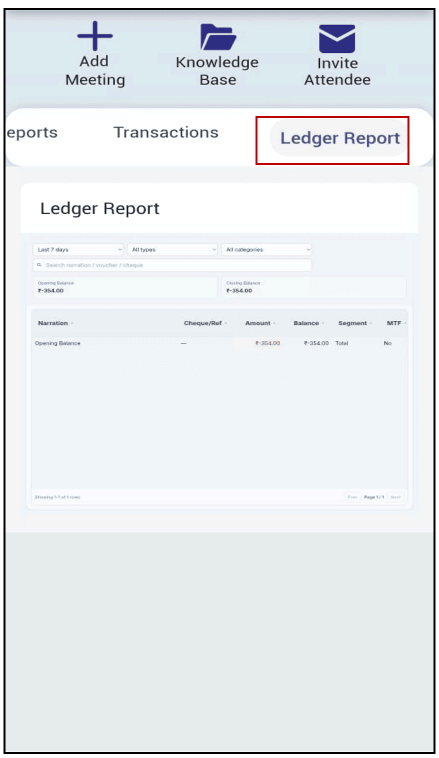
- Click on Client Reports tab for viewing the client reports.



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

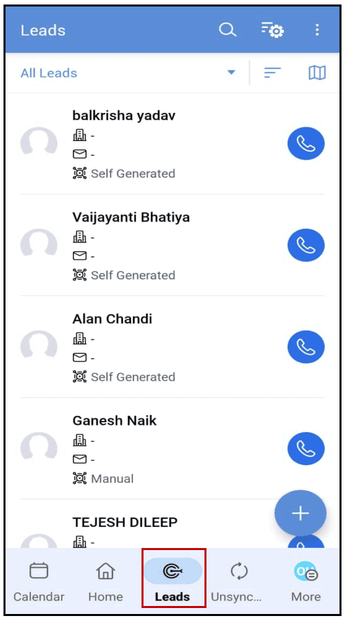


- Click on the Ledger Report tab to view the ledger report.

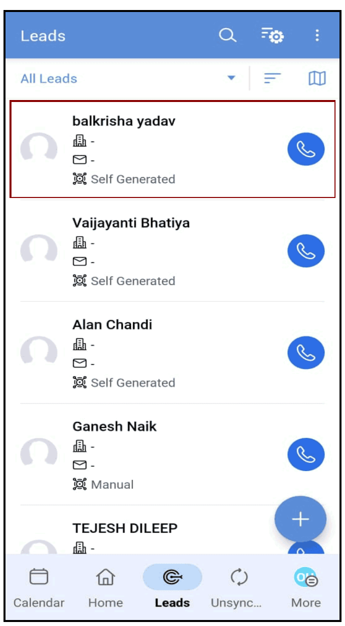


8. How to invite leads to an event

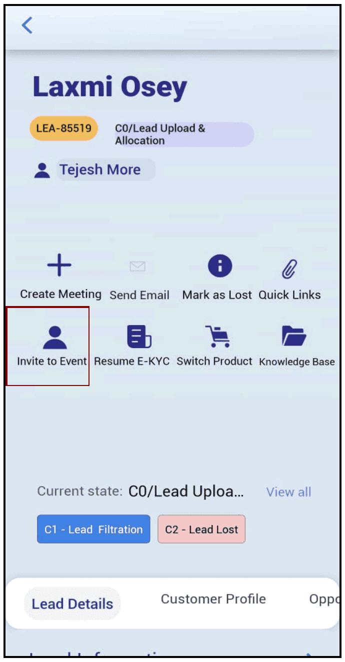
- Click on leads Module.



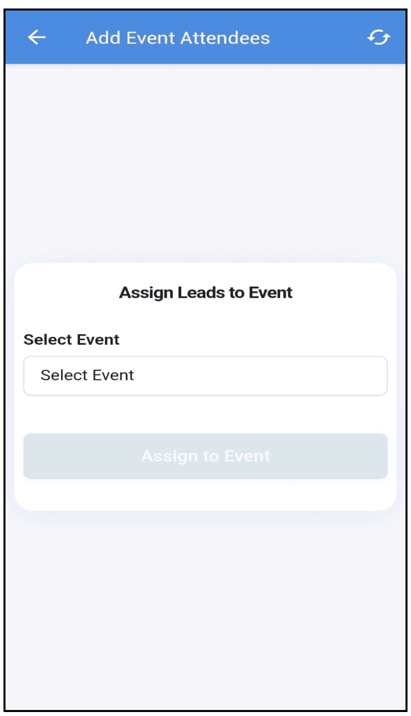
- Click on the lead name whom to invite.



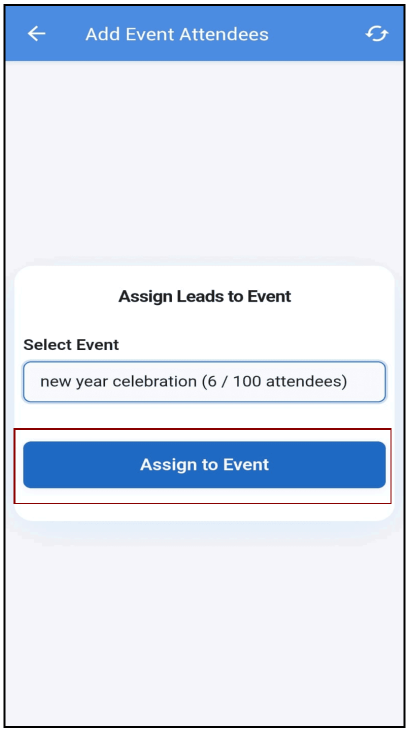
- Click on the Invite to Event tab.



- Select the event from the dropdown menu.

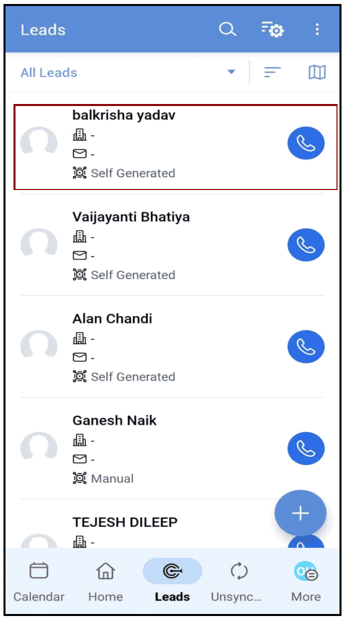


- Click on Assign to Event.

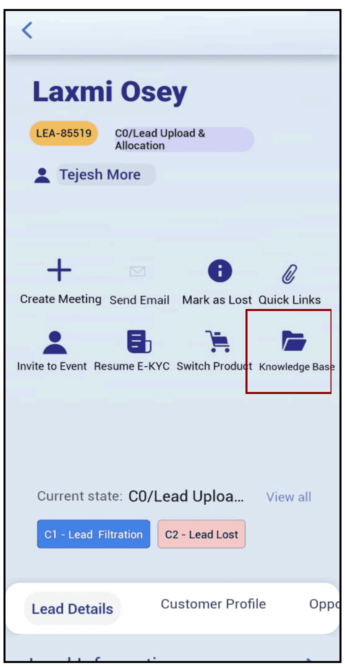


9. How to share knowledge base

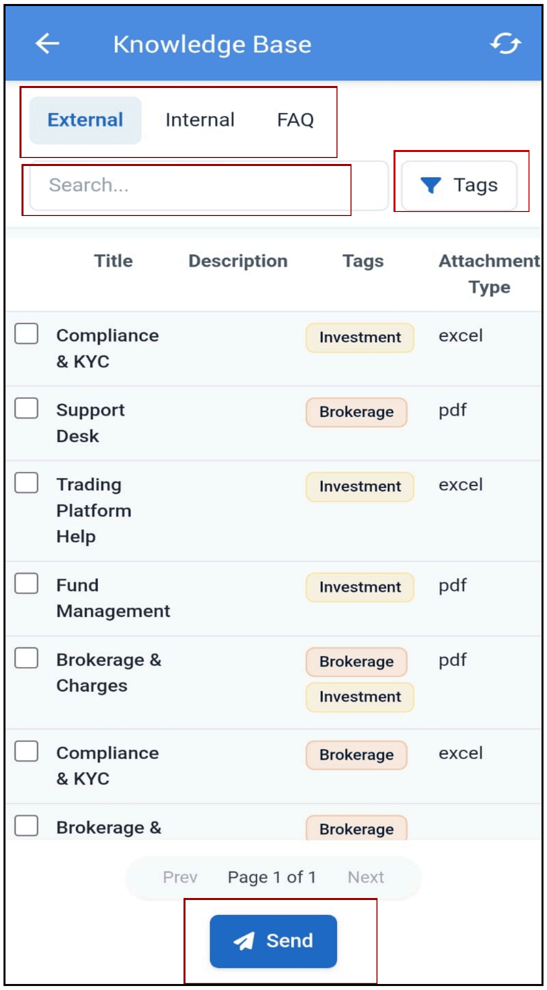
- Click on Lead whom to want to share Knowledge base.



- Click on the Knowledge base tab.

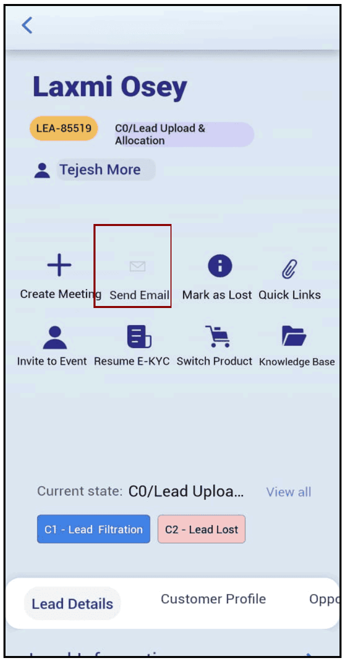


- Select the knowledge base that you want to share.
- You can filter the knowledge base by it type, External, Internal, FAQ or you can search it by name through search bar and you can also filter it through tags Bonds, Brokerage, E-KYC, Investment, and research through filter tab then click on send button.



10. How to send Email from Lead 360.

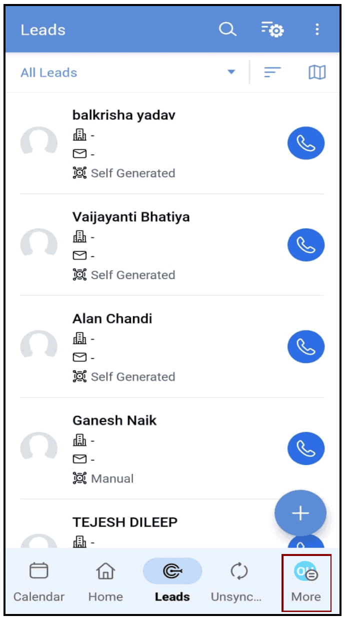
- Click on the Send Email tab.



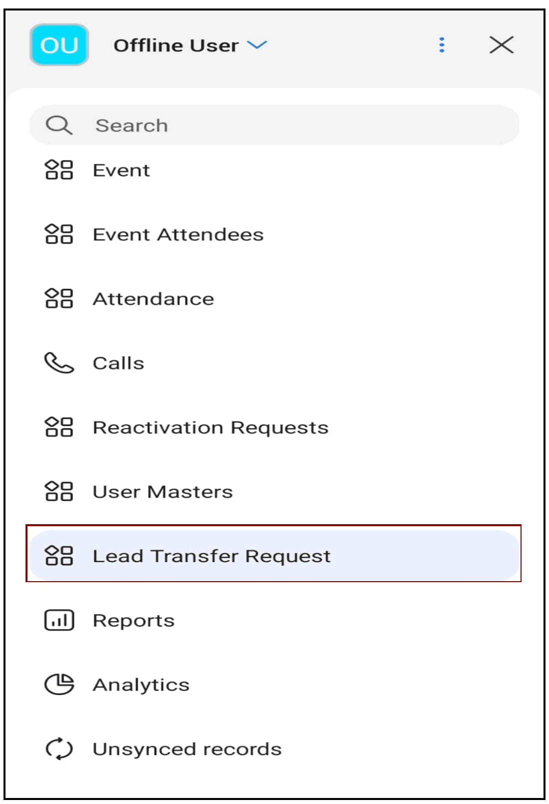
- Write your mail here or you can select a prebuilt template from insert template button.

11. How to create a Lead transfer Request.

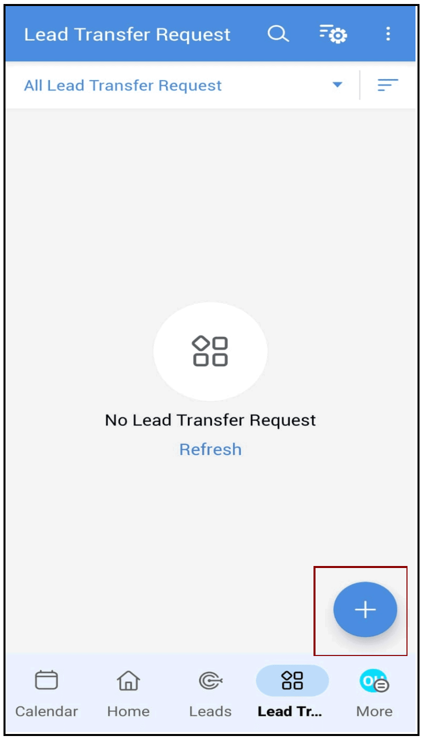
- Click on the More tab in the bottom right corner.



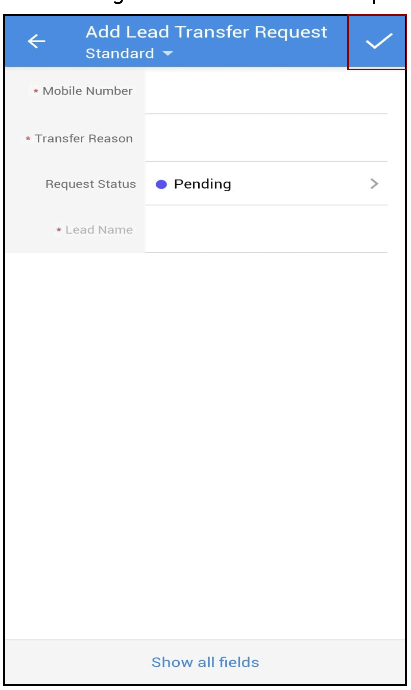
- Search for the Lead Transfer Request module and click on it.



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

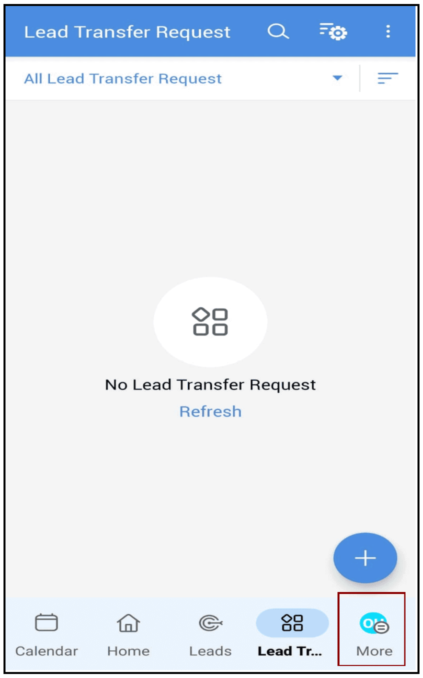


- Enter the Phone number and Reason for transfer and click on the Tick symbol on the top right corner.

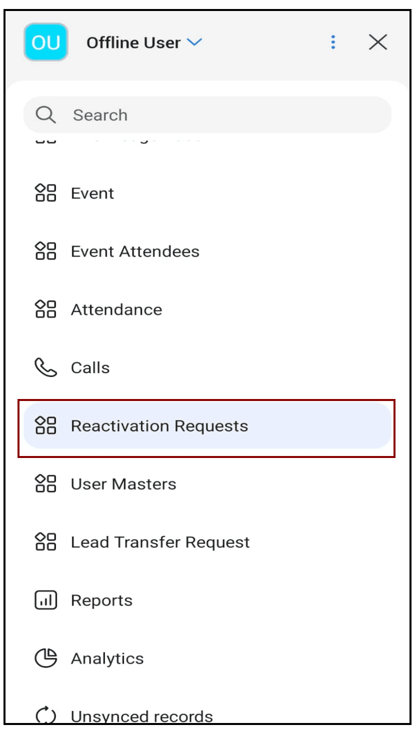


12. How to make a Reactivation Request

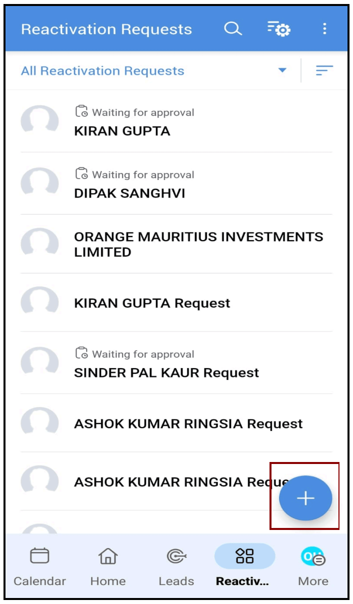
- Click on the more tab and search for Reactivation Request.



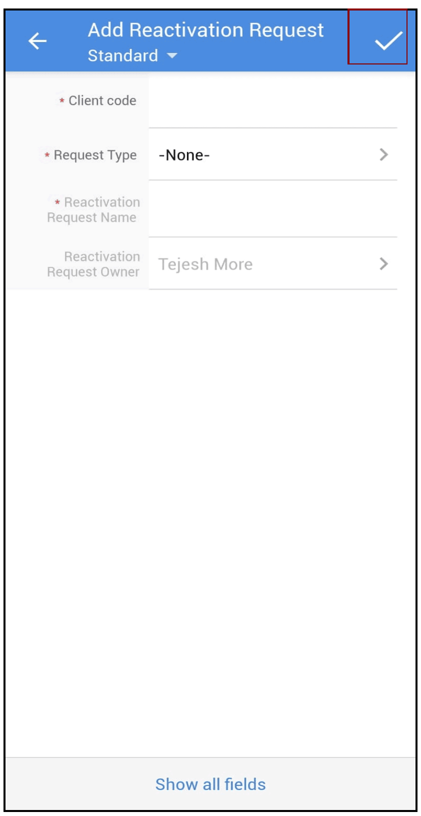
- Click on Reactivation Request.



- Click on the plus icon on bottom right corner.

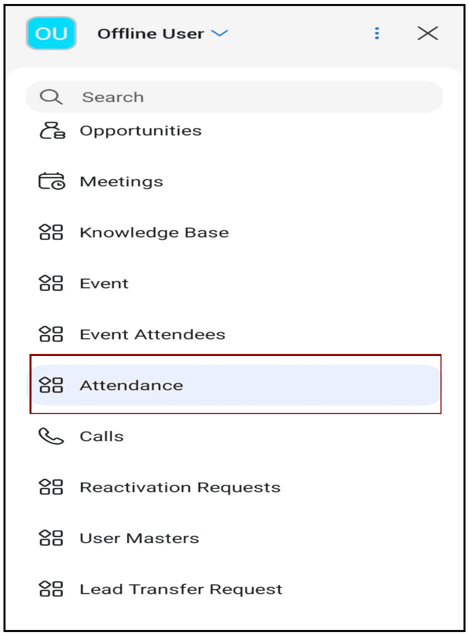


- Enter the Client Code of the user for whom you want to activate, Select request type and and Enter Reactivation Request Name then click on Tick symbol.

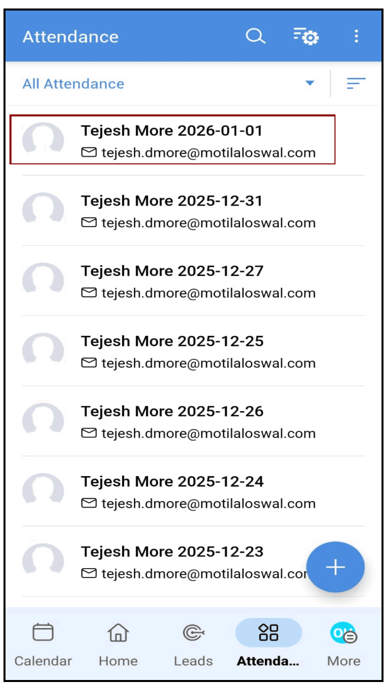


13. How to mark Attendance

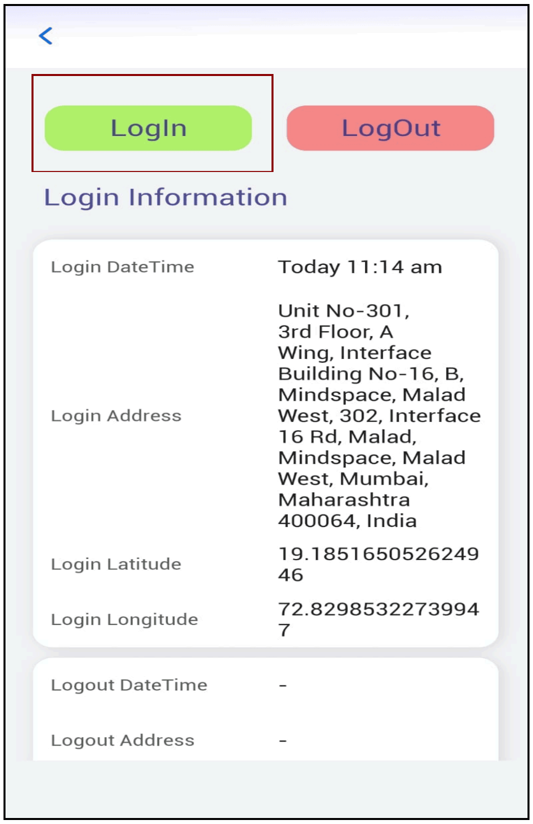
- Click on the More tab Search for Attendance Module and click on it.



- Click on the date for marking attendance.



- Click on Login for marking Attendance.



FRISTINE INFOTECH

DIGITAL SYNERGY VENTURES GROUP

ZOHO Premium Partner

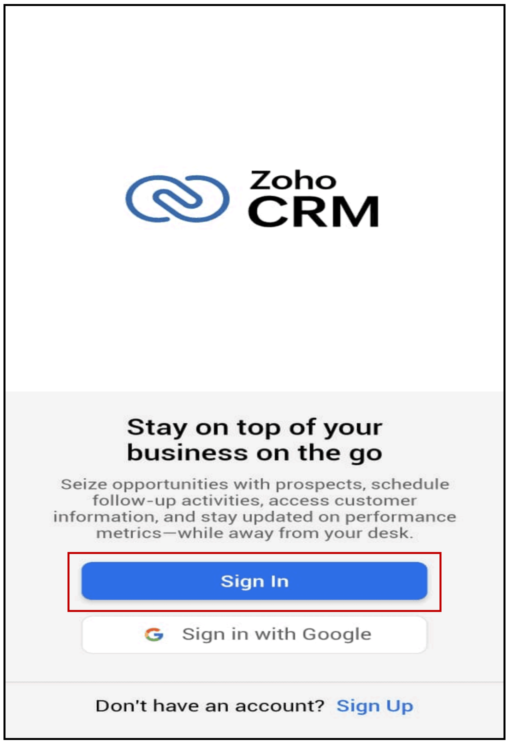
Zoho CRM User Guide for Retail User

motilal oswal

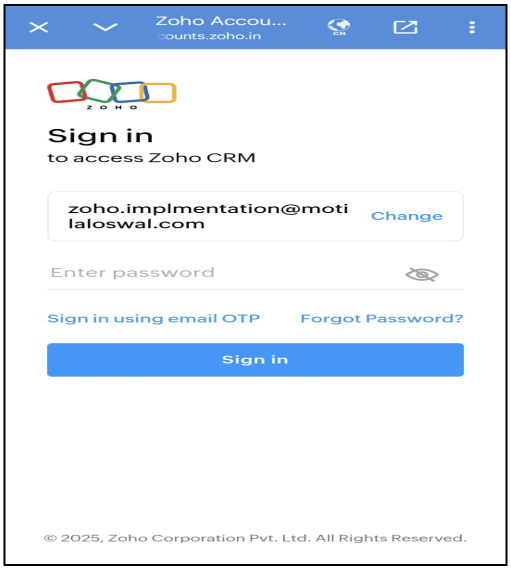
1. How to login to mobile

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

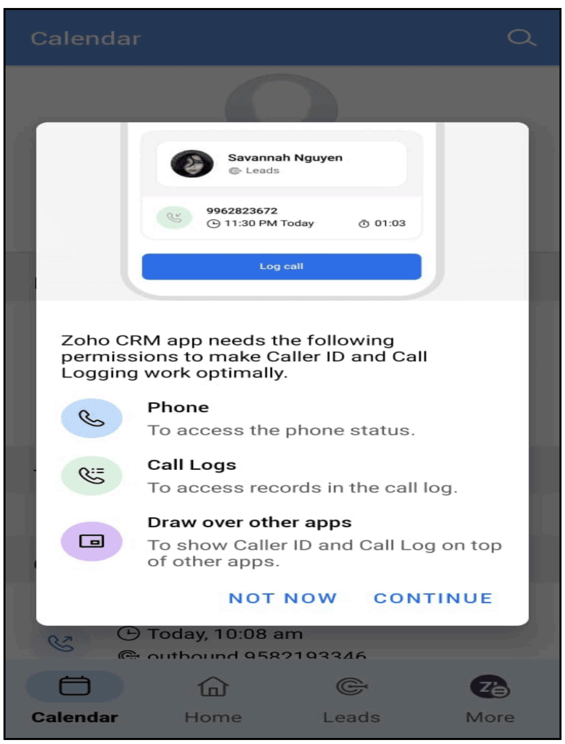
- Download Zoho CRM App in your device
- Open CRM App
- You will see a welcome page
- Click on Sign In



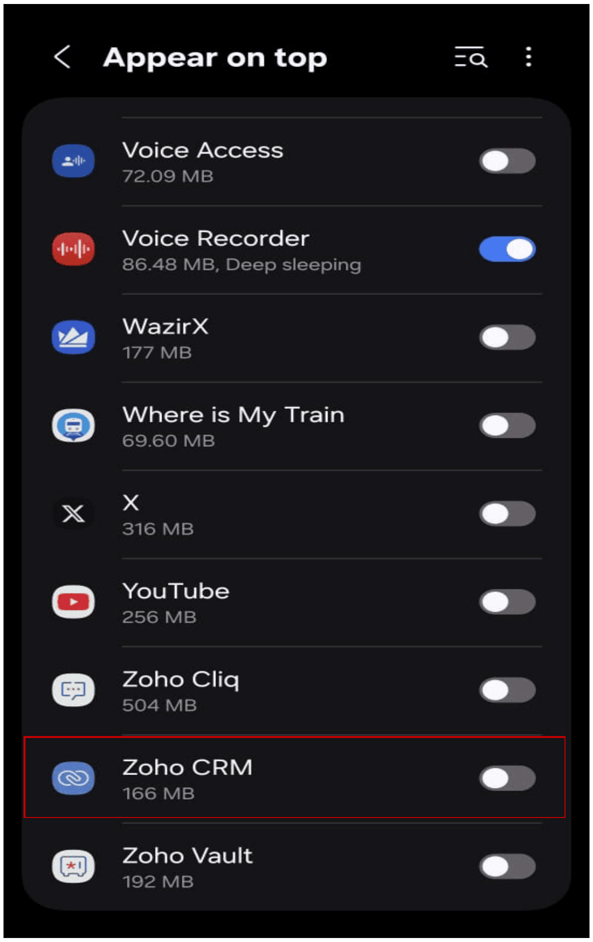
- Enter your Credentials Email and Password



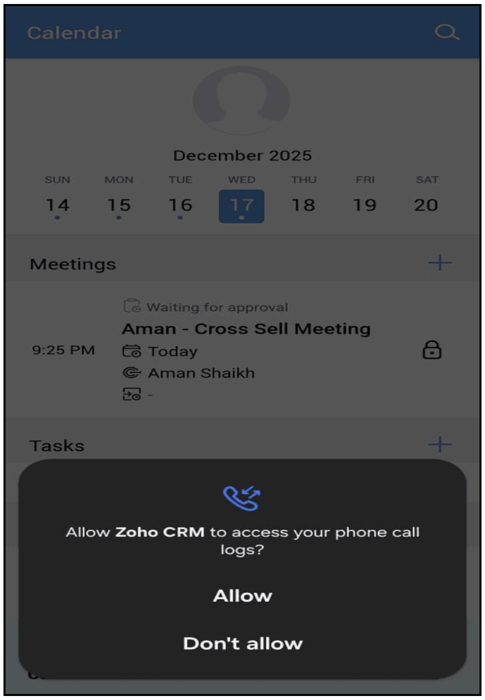
- Give the required permission as asked by the app

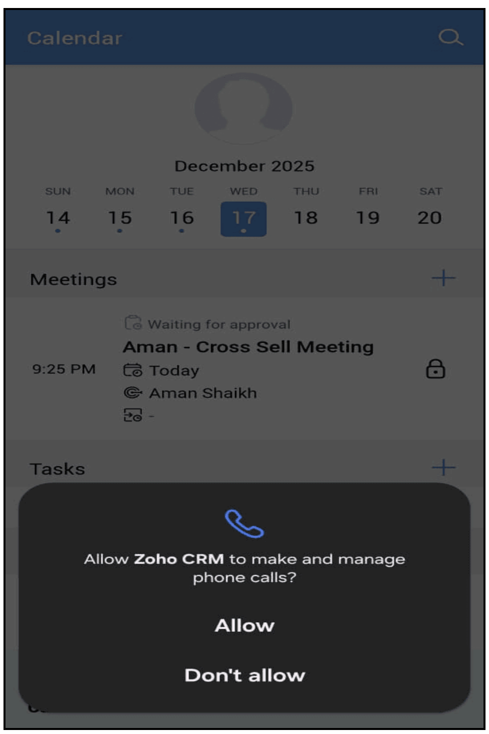


- Enable the the Appear on top for CRM from your device setting

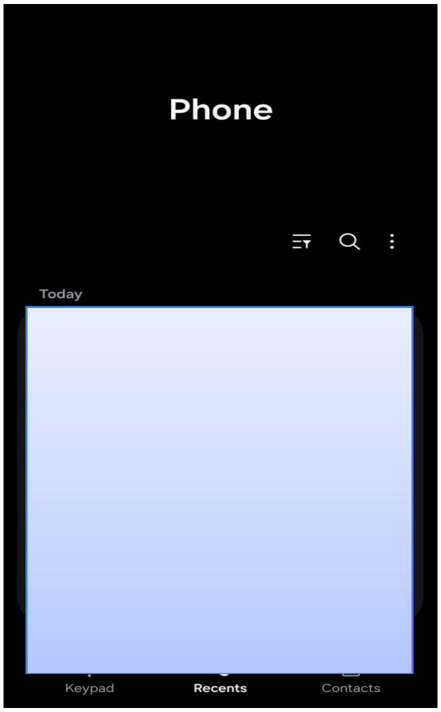


- Give required permissions

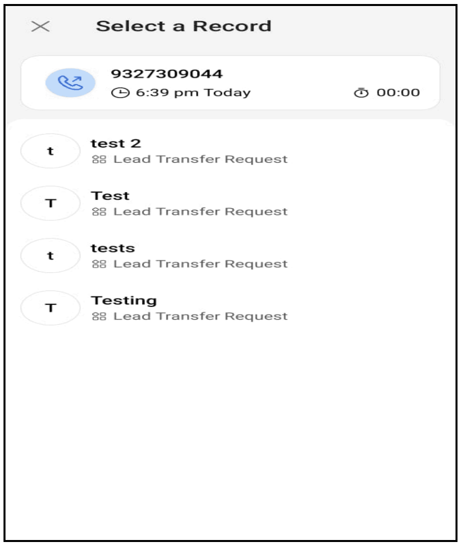




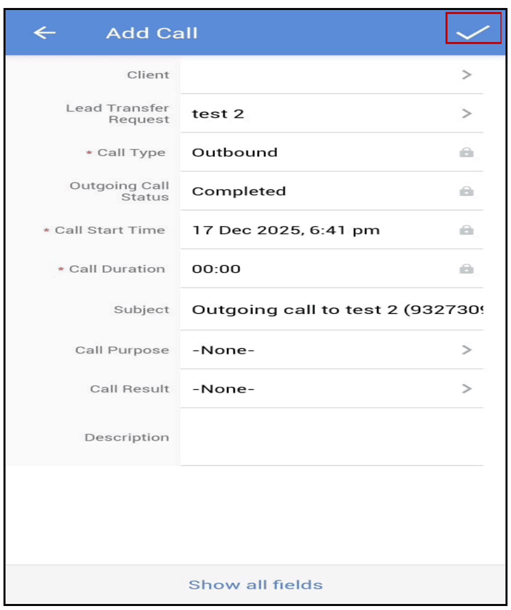
- Then go to your device calling app and make call



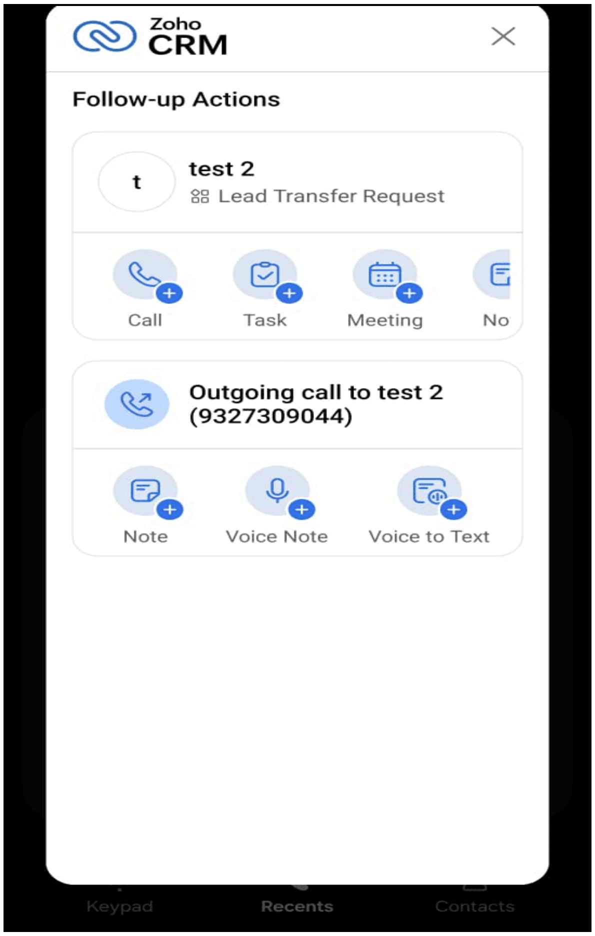
- After Disposing the call, you will get a pop up to select a lead to that number if the lead has created already.
- Select the lead if exist.



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



- 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