



Zoho CRM User Guide for Mobile Retail



- QR Code for Installation of CRM App

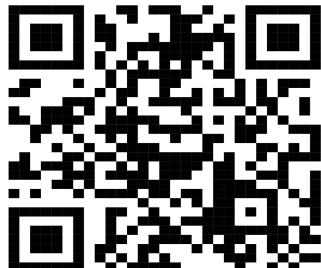


Android



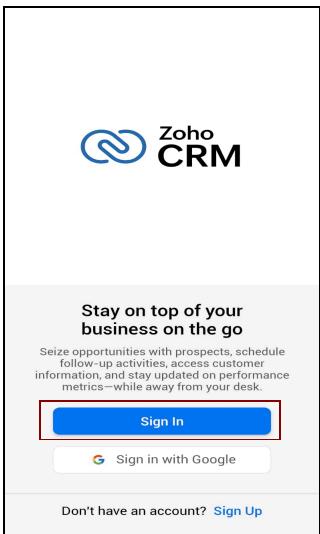
IOS

- QR code for Dista app IOS and Android

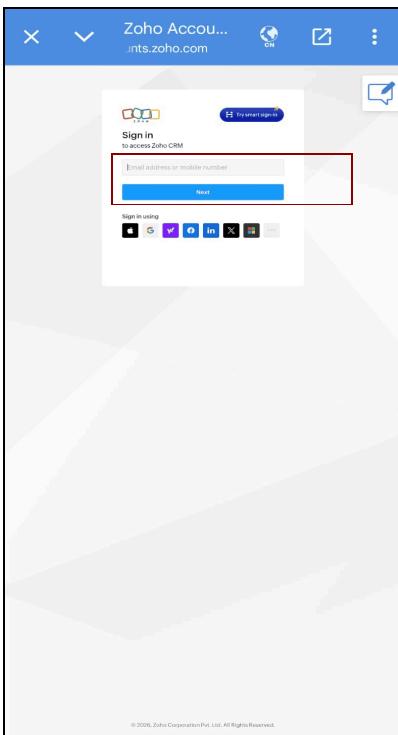


1. How to Login to CRM

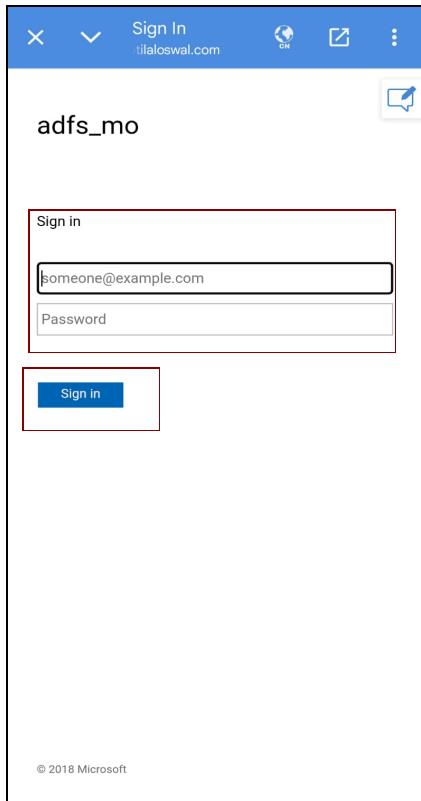
- Open CRM app Click on Sign



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



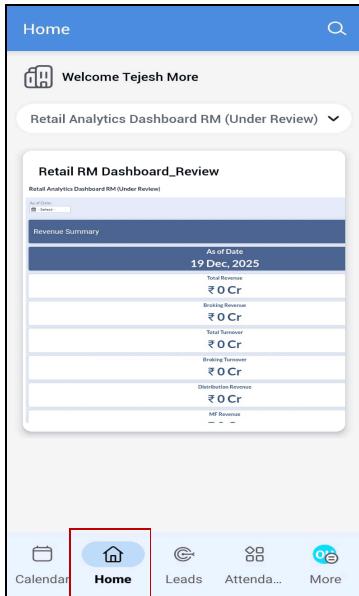
- Enter the Login Credentials and click on sign in button.



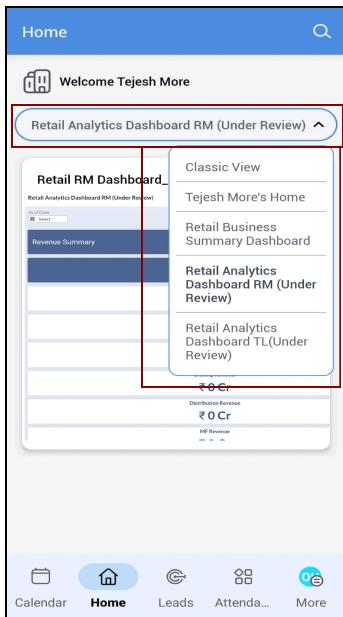
- After login you will get redirected to One Auth page, here you have to enter otp or verify it by Zoho Oneauth app.

2. How to View Dashboards

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



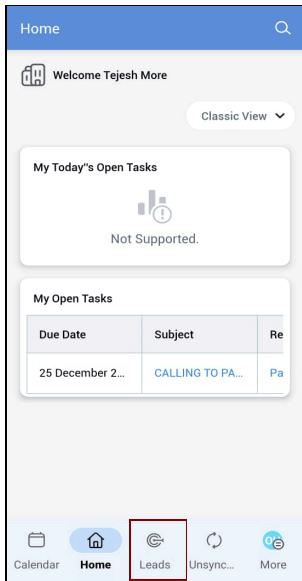
- Click on the bar for change dashboard View and select the view.



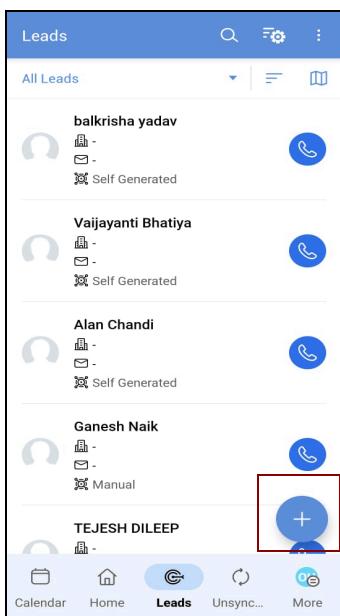
3. How to create Lead

After Logging in you will get redirected to the Home page

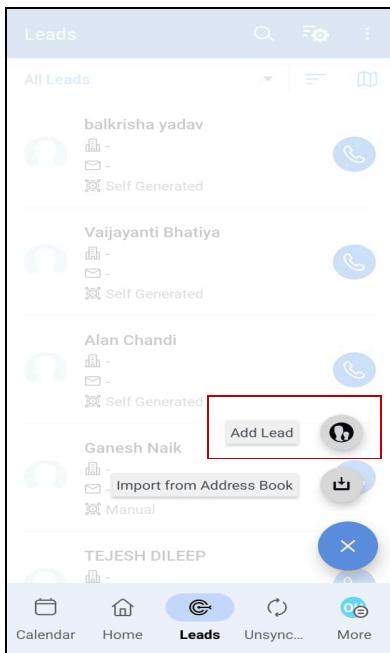
- Click on the leads tab



- 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.

← Add Lead Save as draft
Offline ▾

Create Lead

LEAD INFORMATION

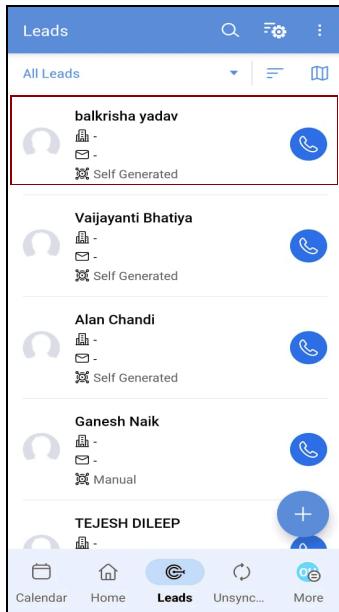
| | | |
|------------------------|----------------|---|
| Salutation | -None- | > |
| * First Name | | |
| * Last Name | | |
| * Mobile | | |
| Lead Source | Self Generated | > |
| Profession | -None- | > |
| * Lead Category | Individual | > |
| * Product | | |
| Margin Amount Expected | -None- | > |
| Email | | |

Create

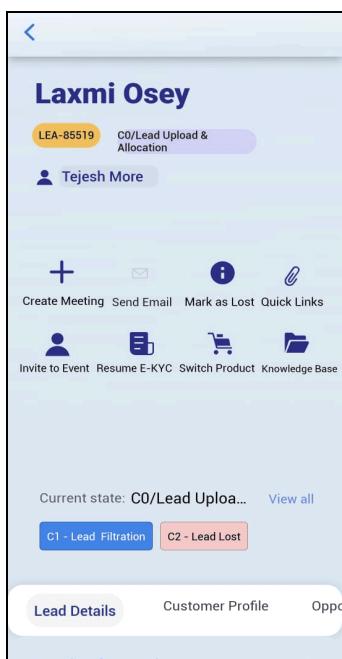
4. How to view or Use Lead 360.

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

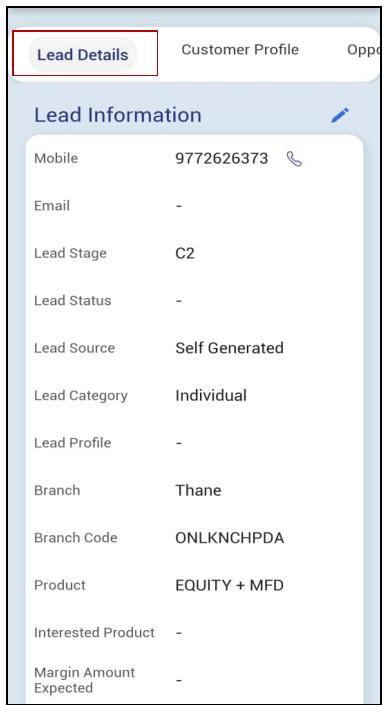
- Click on lead on the lead tab of which you want to see details.



Lead 360 page will get opened as shown below.



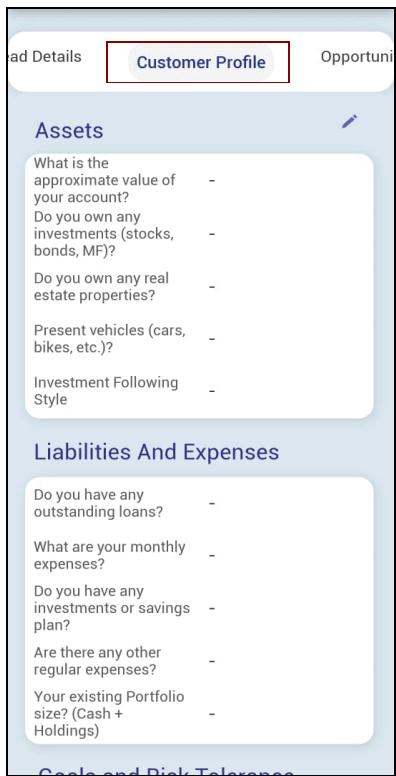
- Here you can see the lead details in the Lead Details tab



The screenshot shows the Lead Details tab selected. The Lead Information section contains the following data:

| Field | Value |
|------------------------|----------------|
| 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



The screenshot shows the Customer Profile tab selected. The Assets section contains the following questions:

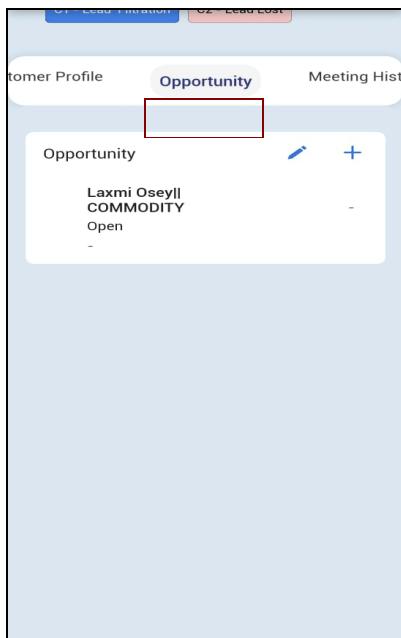
- What is the approximate value of your account? -
- Do you own any investments (stocks, bonds, MF)? -
- Do you own any real estate properties? -
- Present vehicles (cars, bikes, etc.)? -
- Investment Following Style -

The Liabilities And Expenses section contains the following questions:

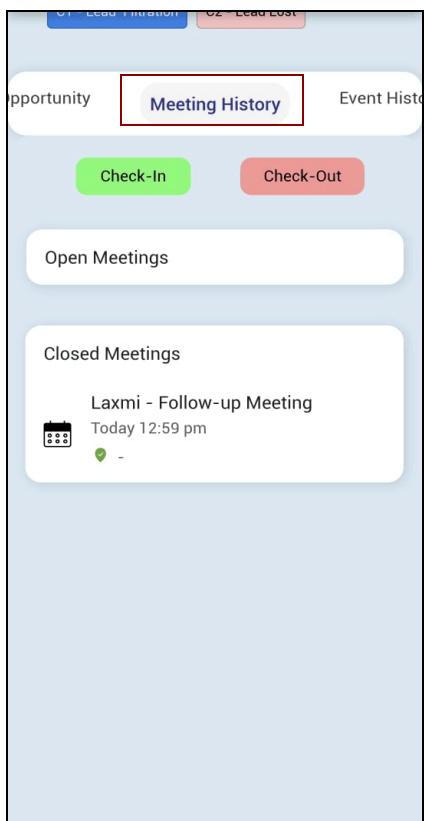
- Do you have any outstanding loans? -
- What are your monthly expenses? -
- Do you have any investments or savings plan? -
- Are there any other regular expenses? -
- Your existing Portfolio size? (Cash + Holdings) -

At the bottom, there is a section titled "Goals and Risk Tolerance" which is currently empty.

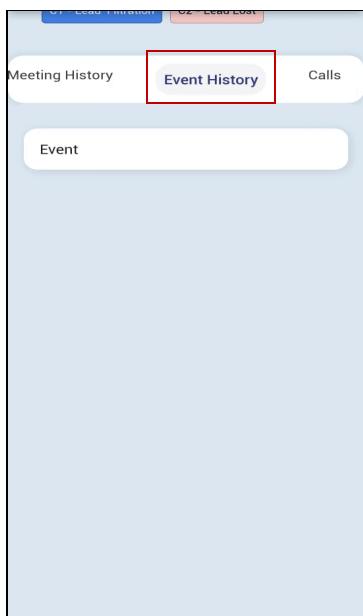
- For viewing opportunities, click on the Opportunities tab.



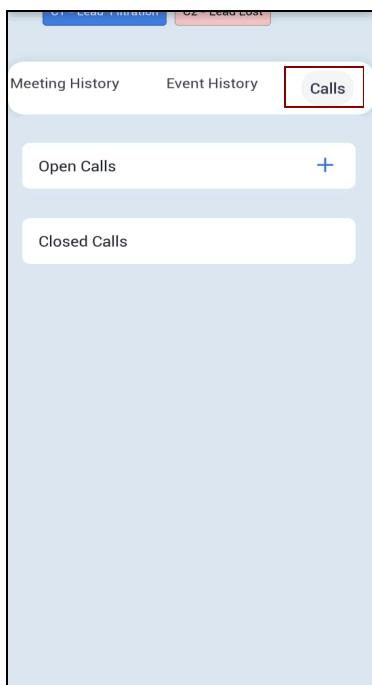
- For viewing meeting history, click on the Meeting History tab.



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

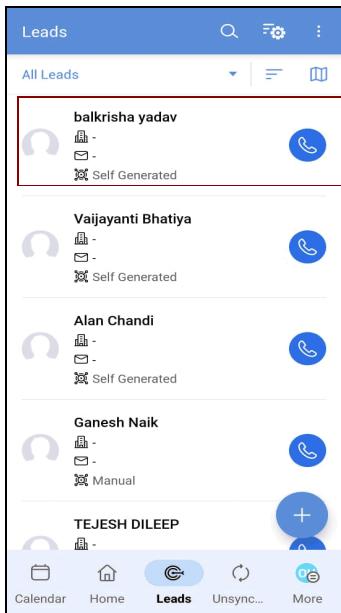


- For viewing call details, click on the tab Calls.



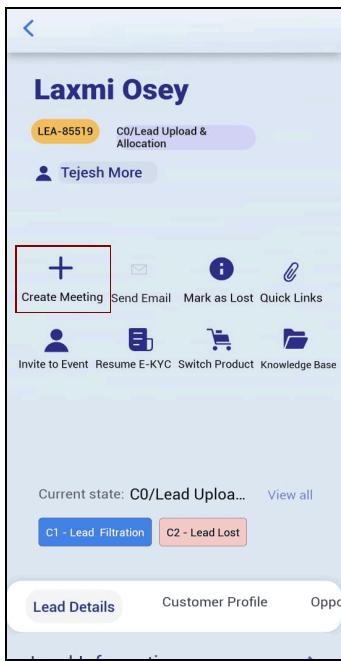
5. How to create Meeting

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



The screenshot shows a list of leads in a software interface. The first lead, 'balkrishna yadav', is highlighted with a red box. Each lead entry includes a profile icon, a name, a phone icon, and a 'Self Generated' status indicator. At the bottom of the list is a lead named 'TEJESH DILEEP' with a blue '+' icon. The navigation bar at the bottom includes 'Calendar', 'Home', 'Leads' (which is selected and highlighted in blue), 'Unsync...', and 'More'.

- Click on Create Meeting



The screenshot shows the detail view for a lead named 'Laxmi Osey'. At the top, there is a yellow button labeled 'LEA-85519' and a purple button labeled 'C0/Lead Upload & Allocation'. Below the lead's name, there is a 'Tejesh More' button. The main area features a 'Create Meeting' button with a red box around it, along with other buttons for 'Send Email', 'Mark as Lost', and 'Quick Links'. Below these buttons are links for 'Invite to Event', 'Resume E-KYC', 'Switch Product', and 'Knowledge Base'. A message at the bottom states 'Current state: C0/Lead Uploa...' with a 'View all' link. At the very bottom, there are tabs for 'Lead Details' (which is selected and highlighted in blue), 'Customer Profile', and 'Opp'.

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

← Create Meeting Form ↗

Meeting Date *

31/12/2025

Activity Type

None

Start Time *

End Time *

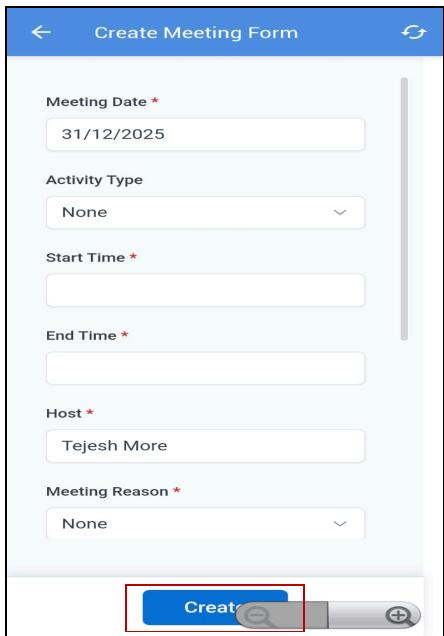
Host *

Tejesh More

Meeting Reason *

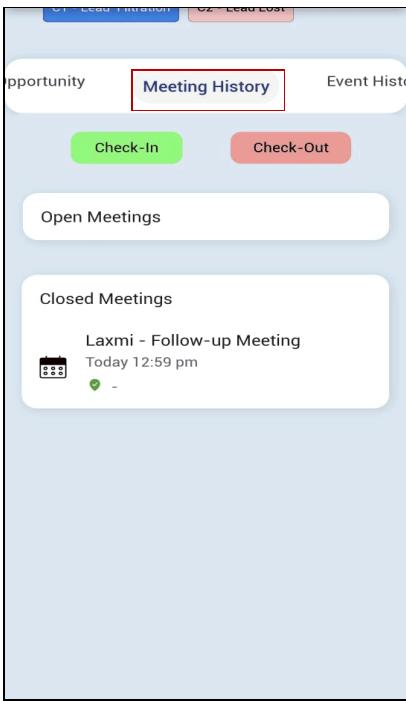
None

Create   

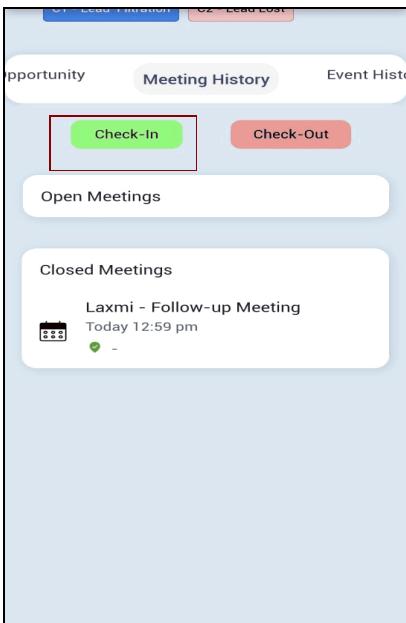


6. How to check in for a meeting and check out from a meeting.

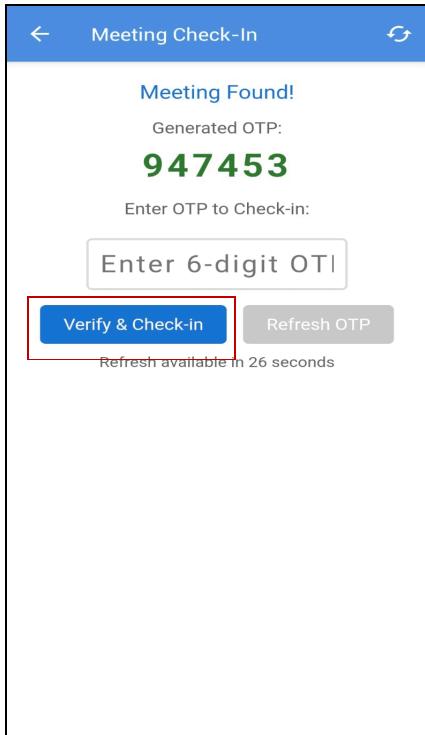
- On the Lead 360 page, go to the Meeting History tab.



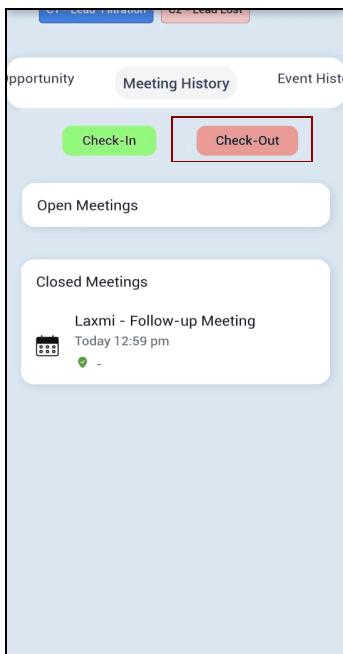
- For check-in click on check-in button.



- 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 *

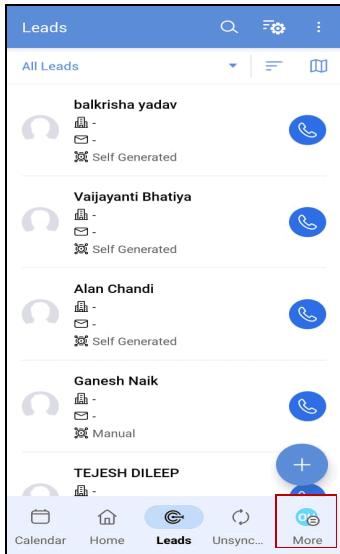
Enter your notes

Submit

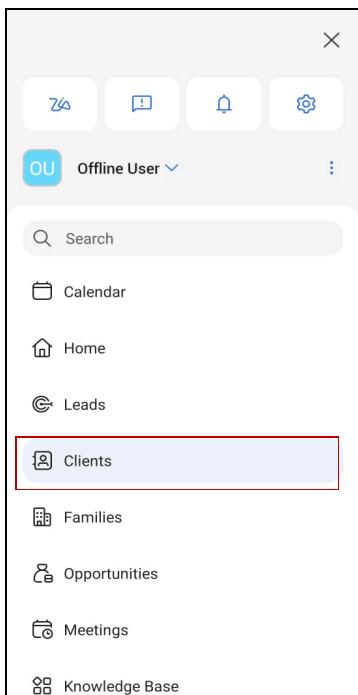
7. Customer 360

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

DIPAK SANGHVI
-
sanghvid53@gmail.com

ASHOK KUMAR RINGSIA
-
aayushringsia123@gmail.com

GOKUL NANDA URMA
-
gokulurma@gmail.com

RAJESH KUMAR
-
raajesh.kumar18121975@gmail.com

HARBINDER SINGH
-
harbindarsingh572@gmail.com

SHIBANI DEY
-
shibani.dey123@gmail.com

Calendar Home Leads Client

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

DIPAK SANGHVI

XTA6260 Active

Family Code -
Family Name -
Tejesh More

Add Meeting Knowledge Base Invite Attendee

Client Details Margin Details Portfolio

Personal Details

| | |
|--------|----------------------|
| Mobile | 9334804350 |
| Email | sanghvid53@gmail.com |
| DOB | 30 Jun 1953 |
| Gender | M |



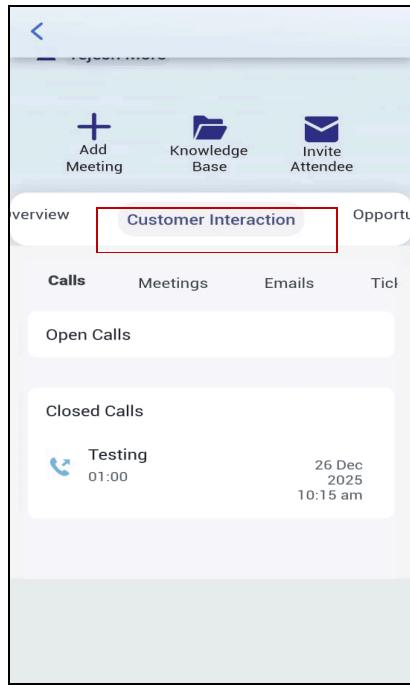
- For margin details, click on Margin Details tab.

The screenshot shows a user interface for managing margin details. At the top, there are three buttons: 'Add Meeting', 'Knowledge Base', and 'Invite Attendee'. Below these are three tabs: 'Client Details', 'Margin Details' (which is highlighted with a red box), and 'Portfolio Overview'. The main content area is titled 'Net Margin' and displays data for T+5, T+9, T+15, and T+30. Each row shows a value of '-'.

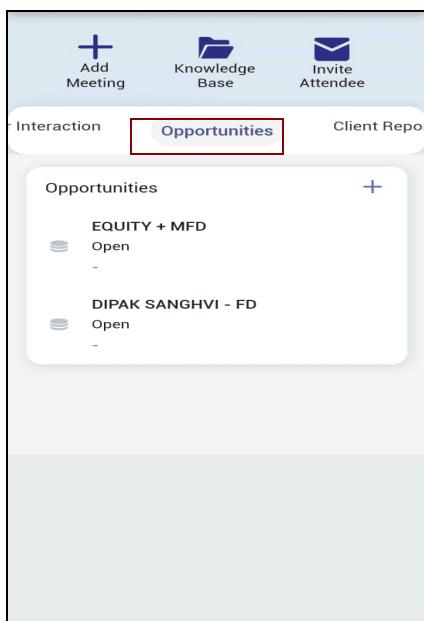
- For viewing portfolio, click on the tab Portfolio Overview.

The screenshot shows a user interface for viewing portfolio overview. At the top, there are three buttons: 'Add Meeting', 'Knowledge Base', and 'Invite Attendee'. Below these are three tabs: 'Client Details', 'Portfolio Overview' (which is highlighted with a red box), and 'Customer'. The main content area is titled 'Portfolio' and displays 'Portfolio Overview' data. It includes sections for 'Margin Details' (showing values like £354.00, £0.00, £0.00, £0.00, £0.00, £0.00, £0.00, £0.00), 'Asset Allocation' (with a message 'Something went wrong. Summary API HTTP 500 - :'), and 'Product-wise Summary' (with a message 'Something went wrong. Summary API HTTP 500 - :'). At the bottom, there is a 'Portfolio View' section with tabs for 'Equity', 'Mutual Funds', 'FNOs', 'Commodities', 'Currency', 'Bonds', 'PMS', 'AI', and 'Alternative Assets'. The 'Equity' tab is selected.

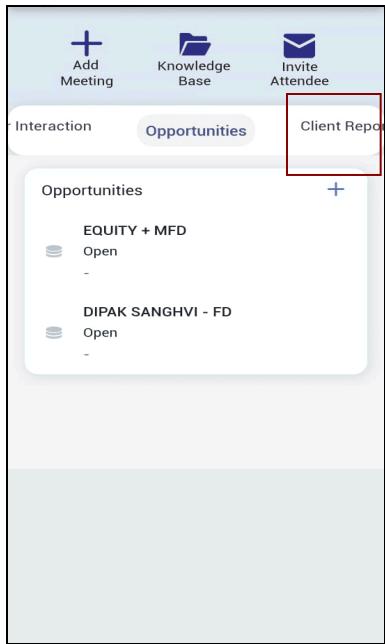
- Click on the Customer Interaction tab to view the previous interactions.
- Here you see calls, meetings, sent emails, and tickets that has been done previously.



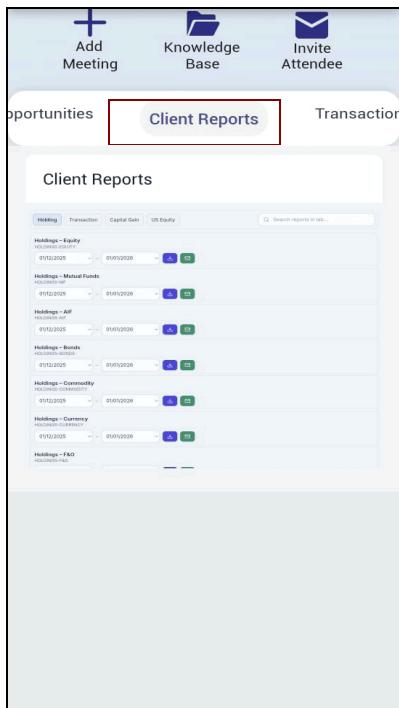
- Click on the Opportunities tab to view the opportunity related to the client.



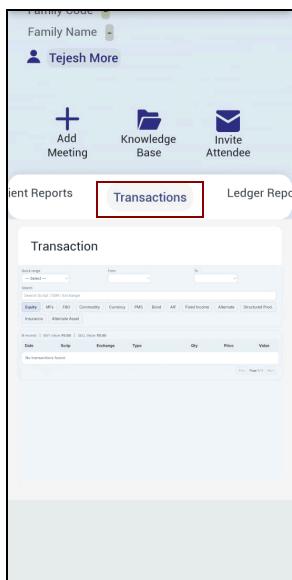
- You can also add opportunities from opportunities tab by clicking on the Plus symbol.



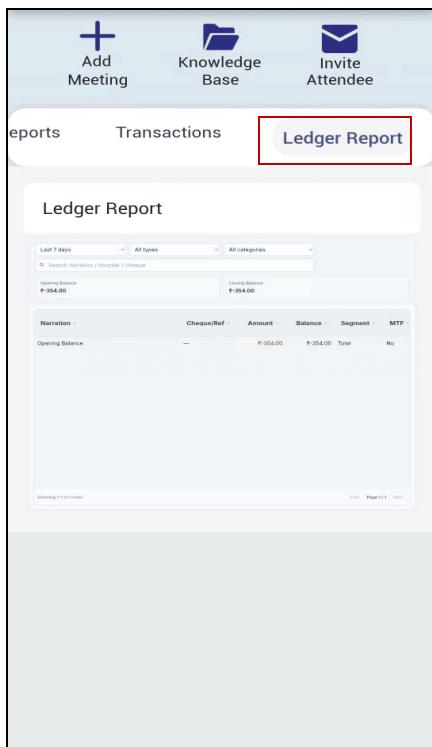
- Click on Client Reports tab for viewing the client reports.



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

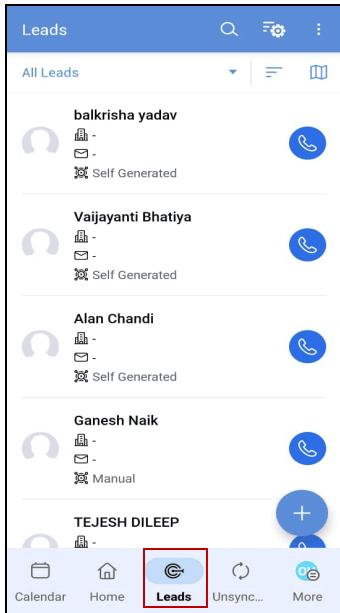


- Click on the Ledger Report tab to view the ledger report.

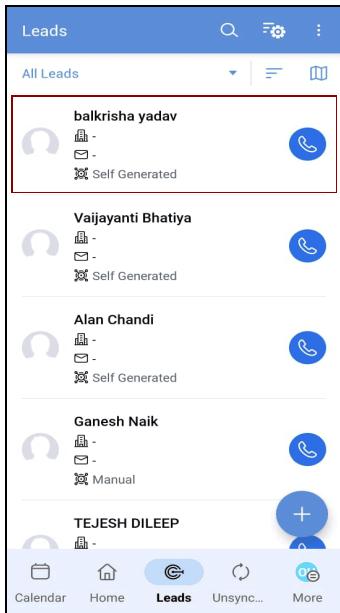


8. How to invite leads to an event

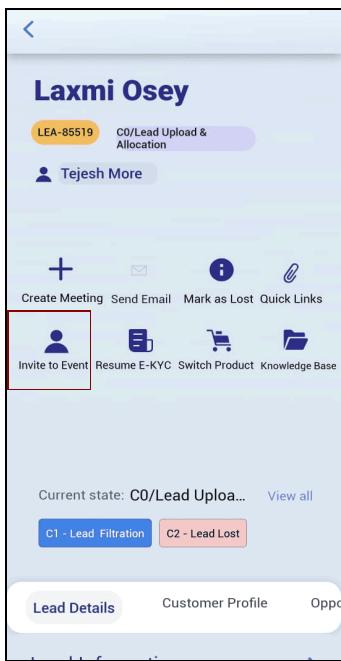
- Click on leads Module.



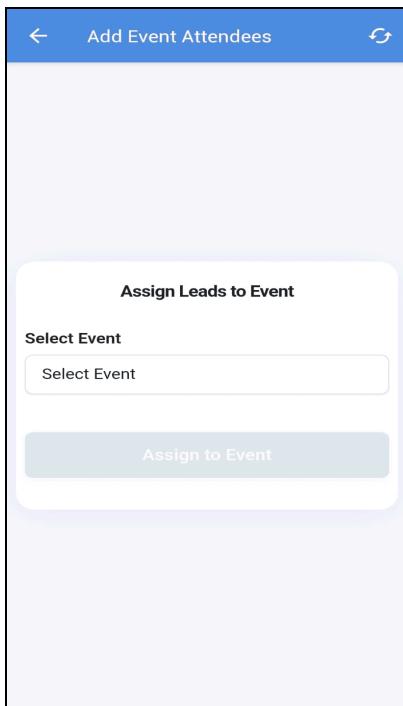
- Click on the lead name whom to invite.



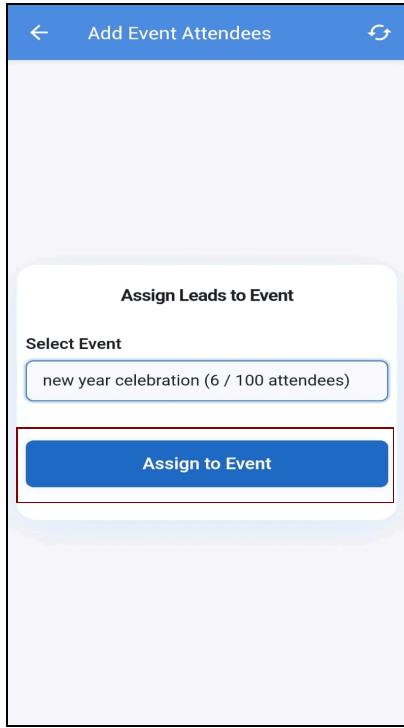
- Click on the Invite to Event tab.



- Select the event from the dropdown menu.

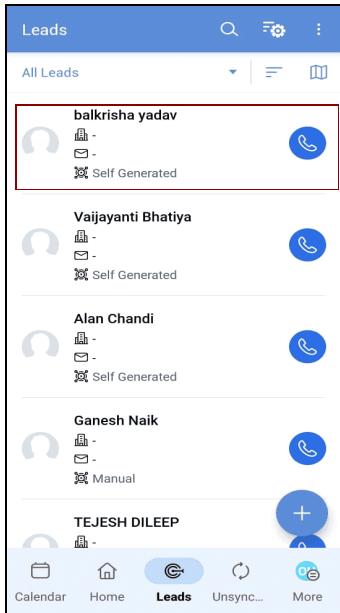


- Click on Assign to Event.

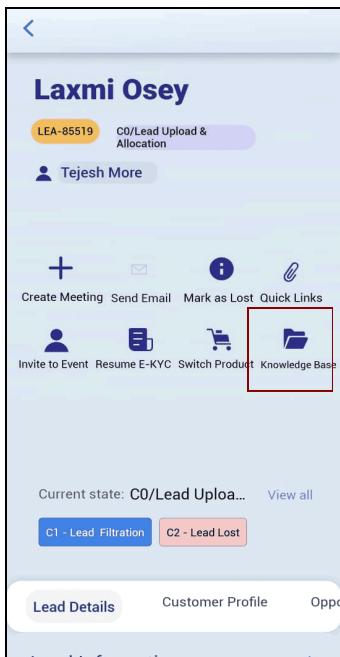


9. How to share knowledge base

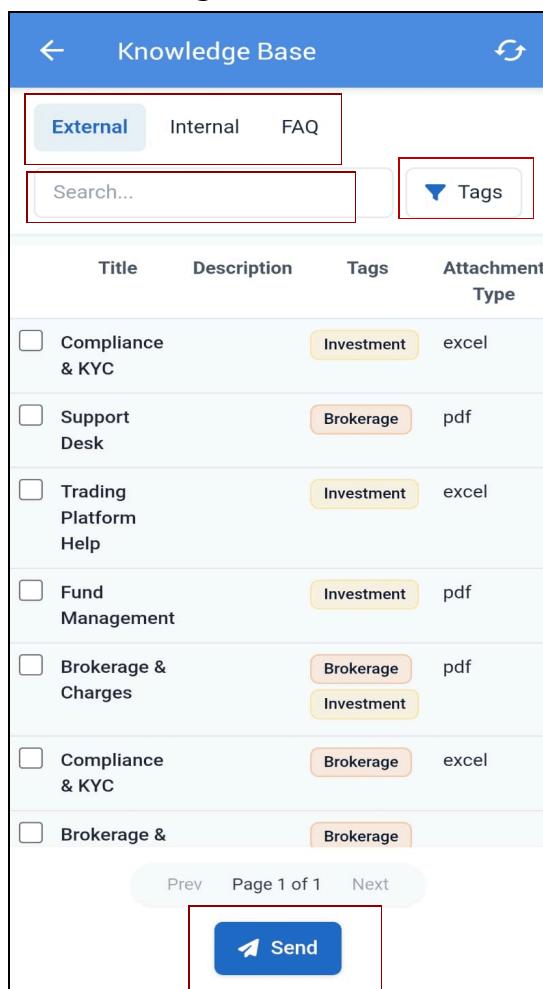
- Click on Lead whom to want to share Knowledge base.



- Click on the Knowledge base tab.



- Select the knowledge base that you want to share.
- You can filter the knowledge base by its 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.



← 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.

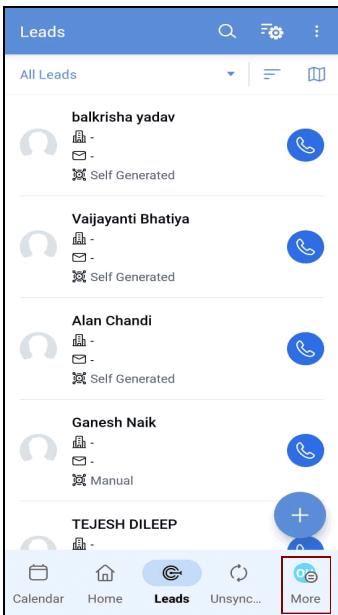
- Click on the Send Email tab.



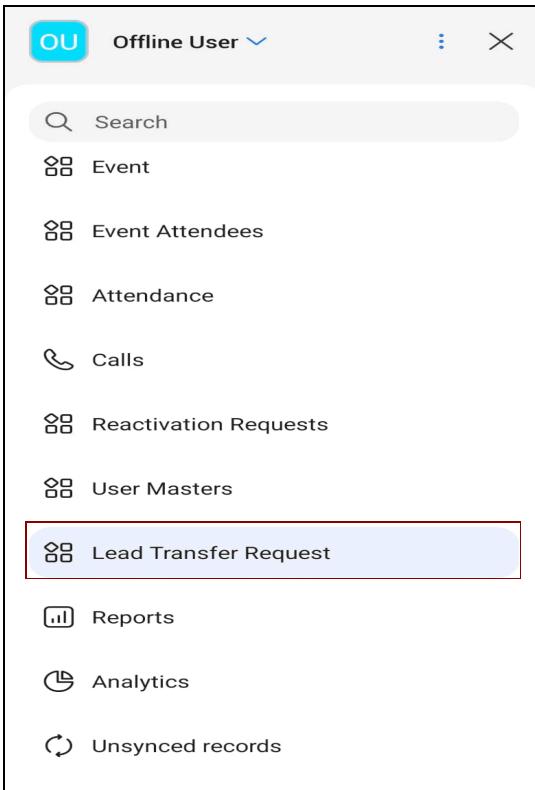
- Write your mail here or you can select a prebuilt template from insert template button.

11. How to create a Lead transfer Request.

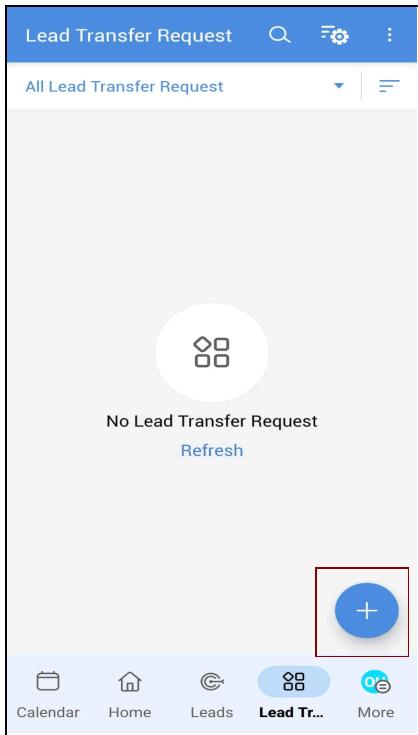
- Click on the More tab in the bottom right corner.



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



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

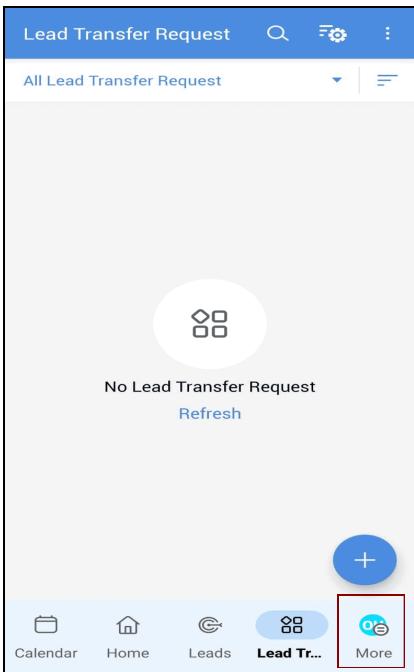


- Enter the Phone number and Reason for transfer and click on the Tick symbol on the top right corner.

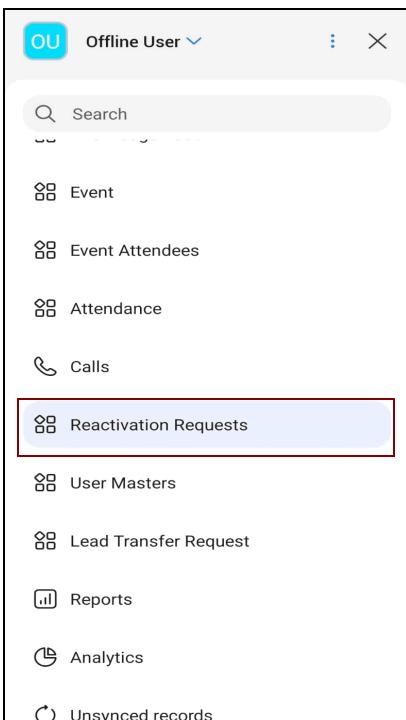
A screenshot of a form titled 'Add Lead Transfer Request' with a 'Standard' dropdown. The form fields include 'Mobile Number', 'Transfer Reason', 'Request Status' (set to 'Pending'), and 'Lead Name'. At the top right of the form is a blue checkmark icon, which is highlighted with a red box. At the bottom of the form is a 'Show all fields' link.

12. How to make a Reactivation Request

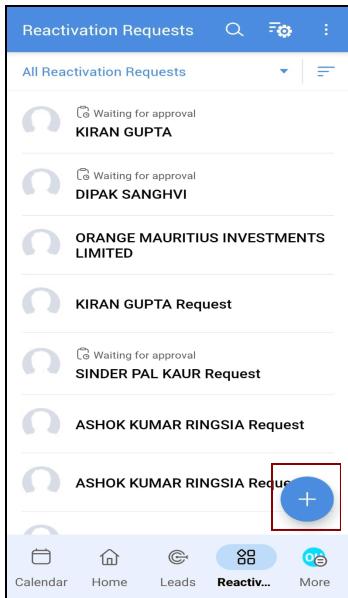
- Click on the more tab and search for Reactivation Request.



- 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.

← Add Reactivation Request Standard ✓

* Client code

* Request Type -None-

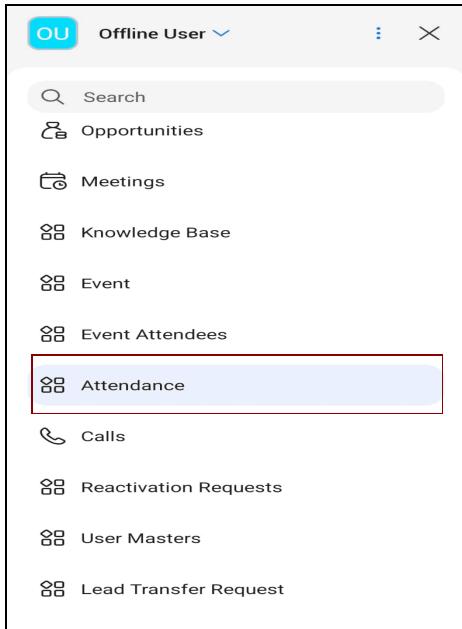
* Reactivation Request Name

Reactivation Request Owner Tejesh More

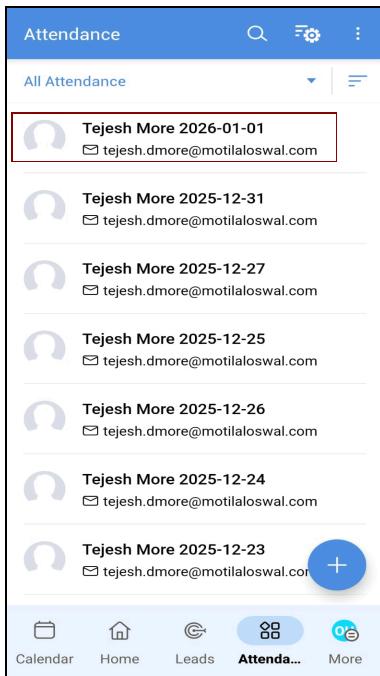
Show all fields

13. How to mark Attendance

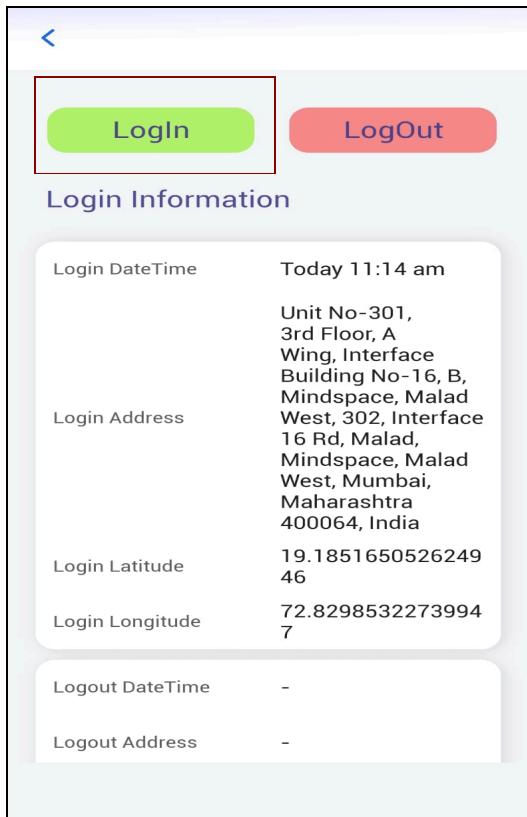
- Click on the More tab Search for Attendance Module and click on it.



- Click on the date for marking attendance.



- Click on Login for marking Attendance.





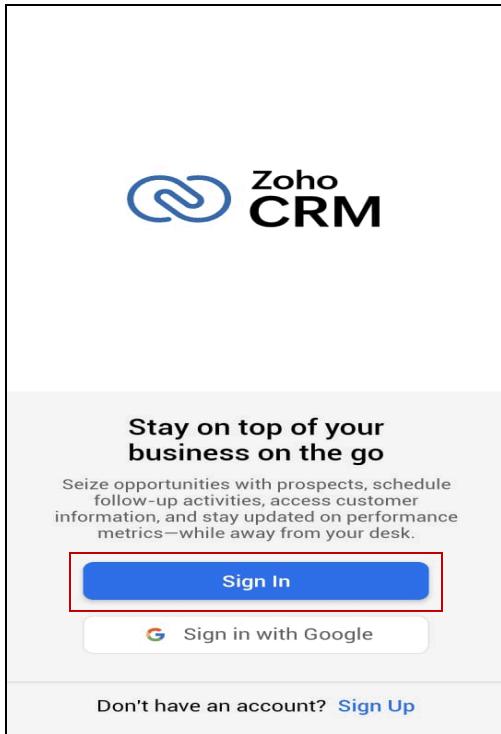
Zoho CRM User Guide for Retail User



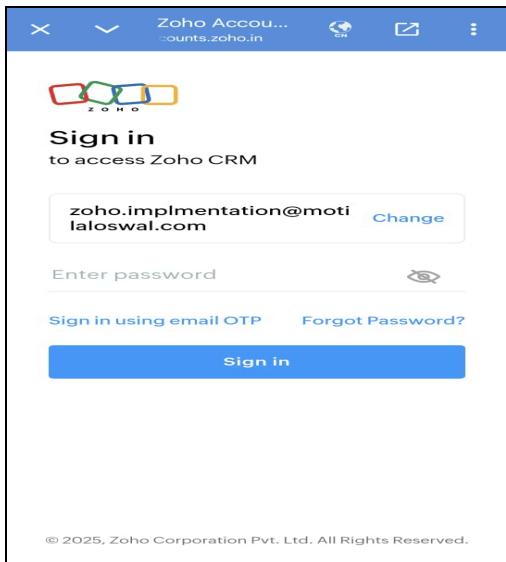
1. How to login to mobile

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

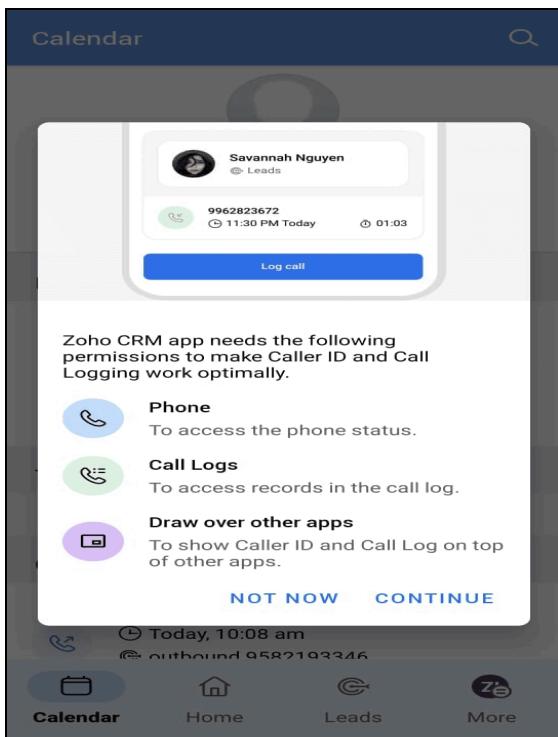
- Download Zoho CRM App in your device
- Open CRM App
- You will see a welcome page
- Click on Sign In



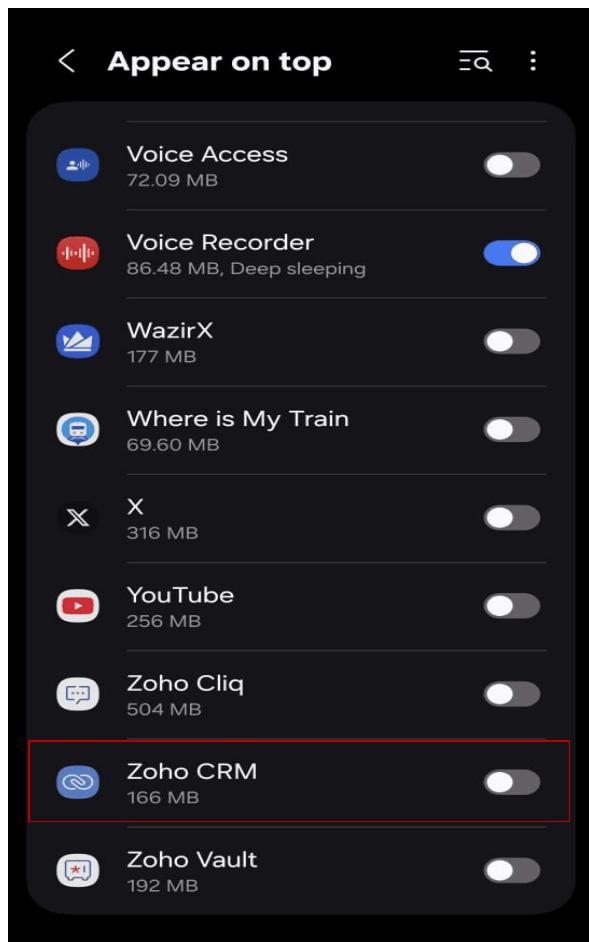
- Enter your Credentials Email and Password



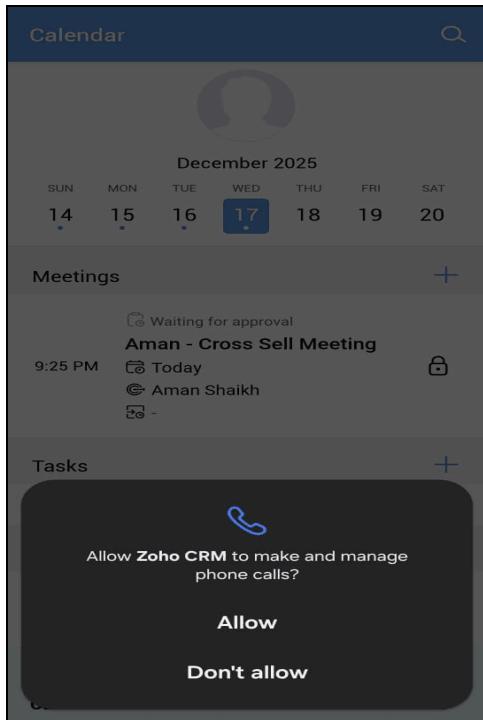
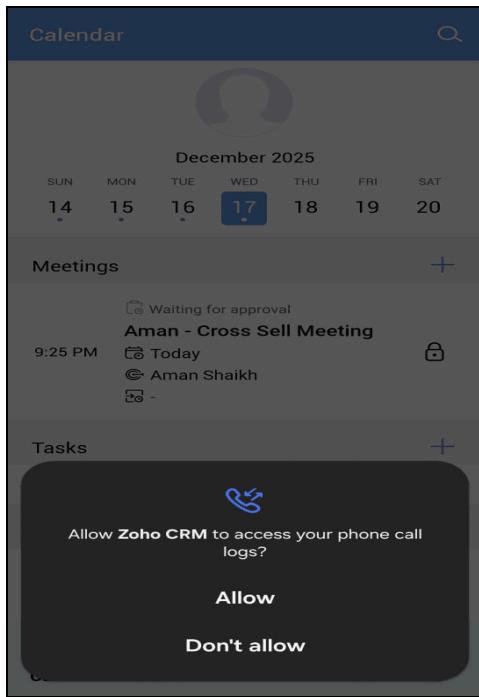
- Give the required permission as asked by the app



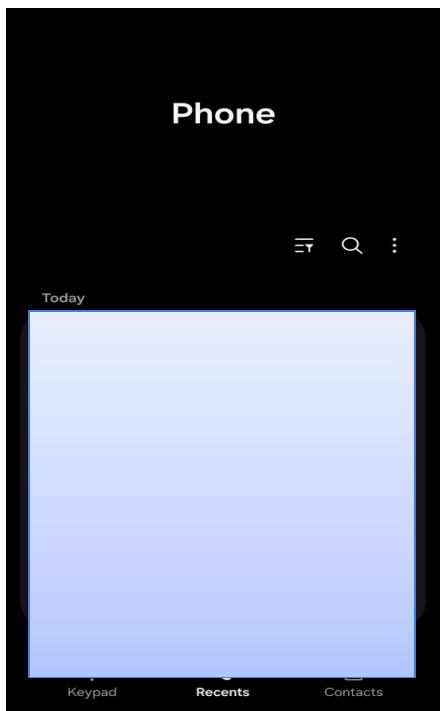
- Enable the the Appear on top for CRM from your device setting



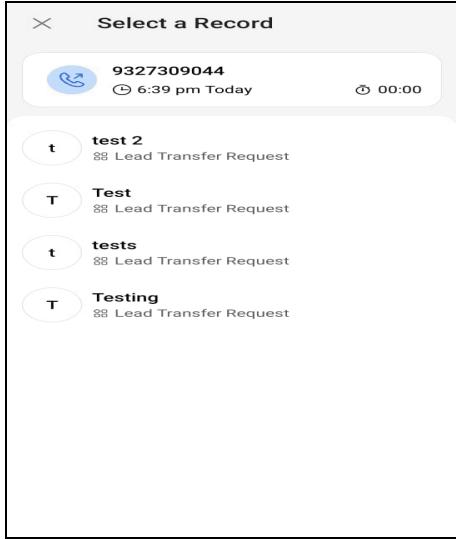
- Give required permissions



- 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.



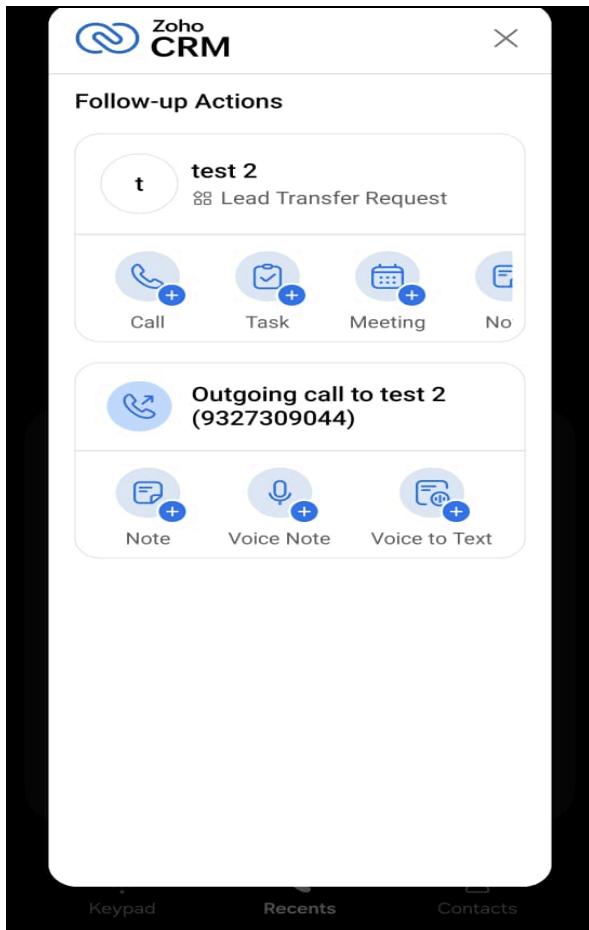
- After that a screen will pop up for call disposition detail
- Enter the required details and tap on the Tick mark

The screenshot shows the 'Add Call' form. The fields and their values are:

- Client: test 2
- 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 (9327309044)
- Call Purpose: -None-
- Call Result: -None-
- Description: (empty)

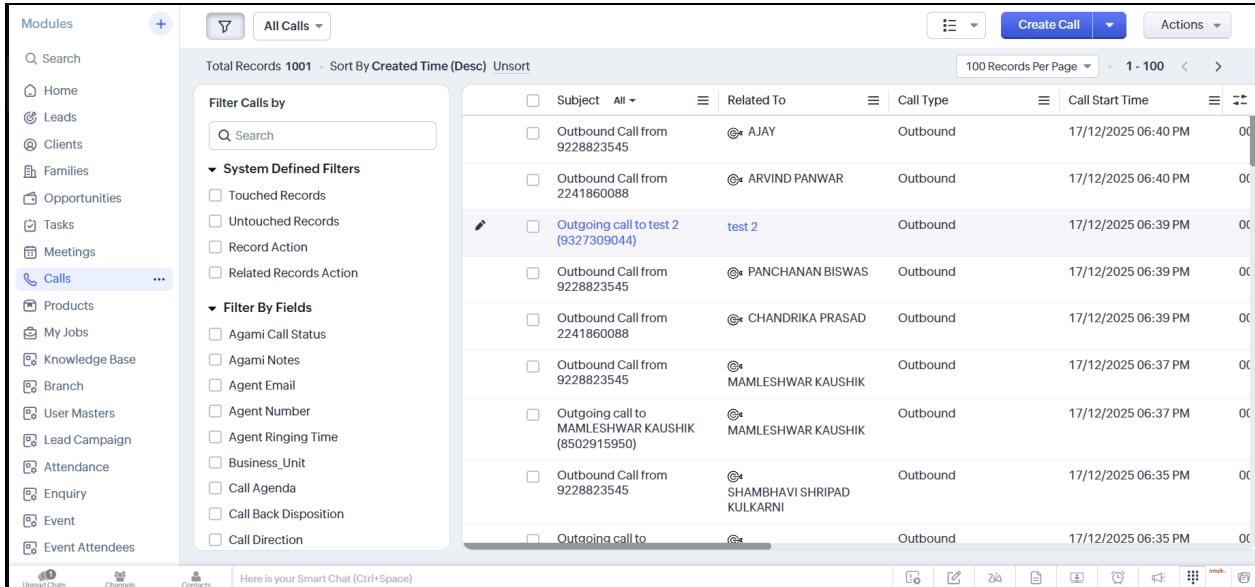
 A red box highlights the checkmark icon in the top right corner of the form.

- 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 shows the 'Calls' section of the Web CRM. On the left, a sidebar lists various modules: Home, Leads, Clients, Families, Opportunities, Tasks, Meetings, Calls (which is selected and highlighted in blue), Products, My Jobs, Knowledge Base, Branch, User Masters, Lead Campaign, Attendance, Enquiry, Event, and Event Attendees. Below the sidebar is a search bar with placeholder text 'Search' and a 'Smart Chat' input field with placeholder text 'Here is your Smart Chat (Ctrl+Space)'. The main area is titled 'All Calls' and displays a table of call logs. The table has columns for Subject, All, Related To, Call Type, Call Start Time, and Duration. The data in the table is as follows:

| Subject | All | Related To | Call Type | Call Start Time | Duration |
|---|-------------------------------------|------------------------------|-----------|---------------------|----------|
| Outbound Call from 9228823545 | <input type="checkbox"/> | ◎ AJAY | Outbound | 17/12/2025 06:40 PM | 00:00:00 |
| Outbound Call from 2241860088 | <input type="checkbox"/> | ◎ ARVIND PANWAR | Outbound | 17/12/2025 06:40 PM | 00:00:00 |
| Outgoing call to test 2 (9327309044) | <input checked="" type="checkbox"/> | test 2 | Outbound | 17/12/2025 06:39 PM | 00:00:00 |
| Outbound Call from 9228823545 | <input type="checkbox"/> | ◎ PANCHANAN BISWAS | Outbound | 17/12/2025 06:39 PM | 00:00:00 |
| Outbound Call from 2241860088 | <input type="checkbox"/> | ◎ CHANDRIKA PRASAD | Outbound | 17/12/2025 06:39 PM | 00:00:00 |
| Outbound Call from 9228823545 | <input type="checkbox"/> | ◎ MAMLESHWAR KAUSHIK | Outbound | 17/12/2025 06:37 PM | 00:00:00 |
| Outgoing call to MAMLESHWAR KAUSHIK (85029115950) | <input type="checkbox"/> | ◎ MAMLESHWAR KAUSHIK | Outbound | 17/12/2025 06:37 PM | 00:00:00 |
| Outbound Call from 9228823545 | <input type="checkbox"/> | ◎ SHAMBHAVI SHRIPAD KULKARNI | Outbound | 17/12/2025 06:35 PM | 00:00:00 |
| Outgoing call to | <input type="checkbox"/> | ◎ | Outbound | 17/12/2025 06:35 PM | 00:00:00 |