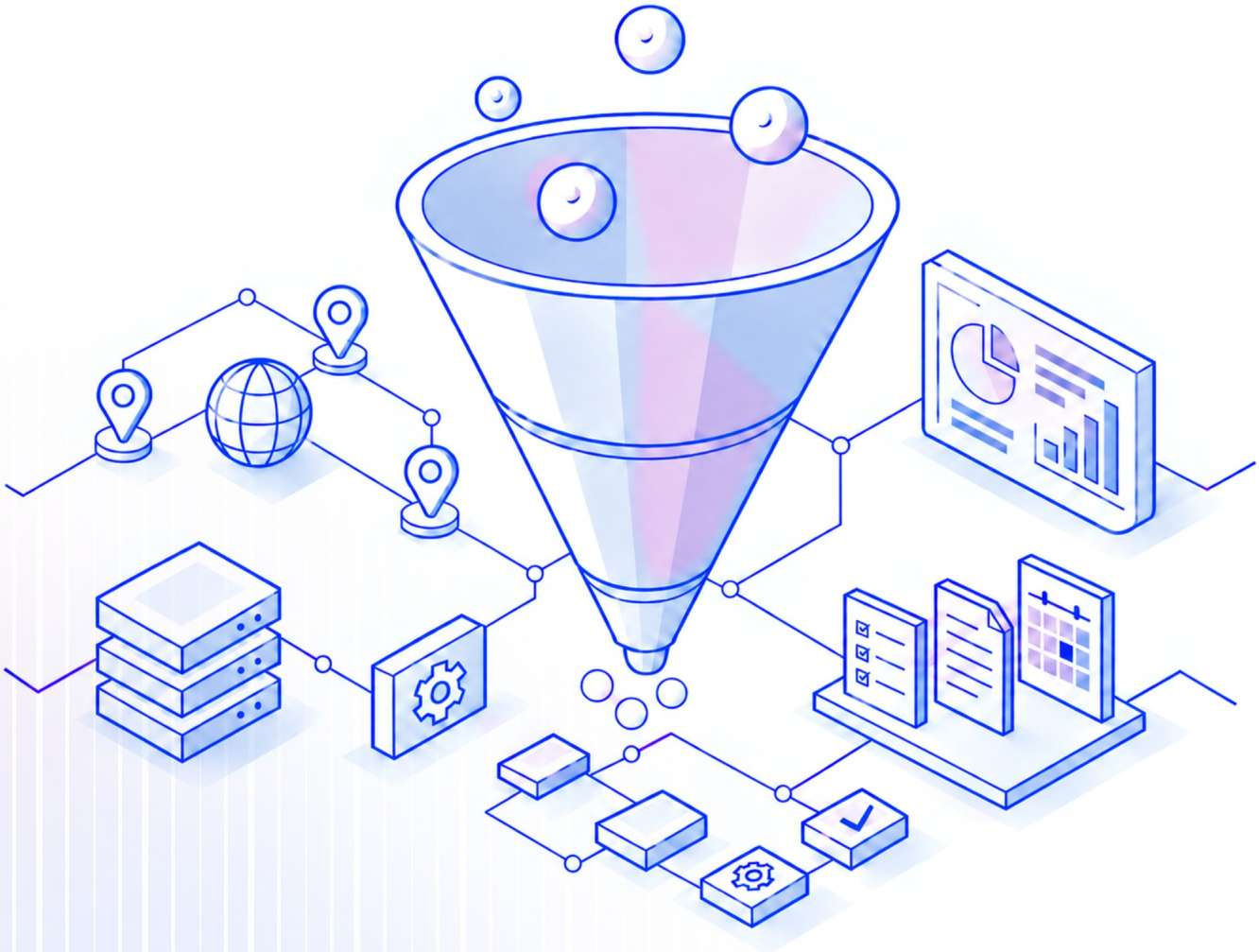
Zoho CRM

12 CRM essentials to get your business up and running

A practical guide for small and medium businesses →



ZOHO

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Streamlining your growing business with Zoho CRM

As your business grows, keeping track of customers and sales opportunities becomes more demanding. Inquiries arrive through different channels, customer details sit in spreadsheets, and important conversations remain in individual inboxes. Your team spends more time searching for information, follow-ups get missed, and understanding sales progress means asking each rep for an update.

For a small or medium business, these gaps can stretch an already busy team and leave promising opportunities unattended. You need a shared place to organize customer information, assign responsibility, and keep the next action clear. That's where Zoho CRM is a huge help.

With Zoho CRM, your team can manage inquiries, track customer conversations, organize sales opportunities, and schedule follow-ups. You can also automate routine actions and use reports and analytics to understand where your sales efforts need attention.

Start by configuring a setup that reflects how your business works. Whether you're new to CRM, switching systems, or improving your existing Zoho CRM account, this guide walks you through the essentials with practical examples.

To begin, let's look at what your team needs from CRM today. That will help you decide what to set up first and what can wait.

Build the setup your business needs today

Imagine a customer asks about a product on your website. Someone responds by email, another person shares a quote, and the customer calls a week later to discuss it. If these interactions remain with different people, your team has to piece the conversation together manually each time.

With the relevant information in your CRM, the person handling the next conversation can see what the customer needs, what has already been discussed, and what needs to happen next. That's a useful place to begin.

You don't have to configure every available feature before your team can start; just ensure that your setup helps you answer a few everyday questions:

- ☑ **Who has contacted us, and what do they need?**
- ☑ **Who is handling each inquiry or opportunity?**
- ☑ **What was discussed, and what's the next action?**
- ☑ **Which opportunities are progressing, and which ones need attention?**

As your team uses Zoho CRM, you will discover where more customization, automation, or AI assistance can help. If a feature doesn't solve a current problem, you can revisit it later.



Decide what your CRM needs to help you do

Before you change fields or build workflows, look at the work you want your CRM to address. Do inquiries go unanswered? Are follow-ups dependent on someone remembering them? Does your sales manager have to ask every rep for a pipeline update?

Choose a few immediate priorities; these will help you decide what information to collect, what to automate, and what to measure.

Start with an everyday problem

Suppose you run a small office furniture business. Inquiries arrive through your website, phone calls, and referrals. Your reps respond, discuss requirements, share quotes, and follow up until the customer decides.

Your first goals could be to assign every inquiry to a rep, record the customer's requirements, and make sure each active opportunity has a next action. These goals are specific enough to guide your setup.

Notice how an inquiry currently becomes a sale. Include the people involved and the information they need at each hand-off. A short outline is sufficient; you can refine it as you work through the guide.

Agree on what success looks like

Turn each priority into something you can check. For example, your sales manager should be able to open the CRM and see which inquiries still need a response. Your reps should be able to find the latest conversation and their next task without asking a colleague.

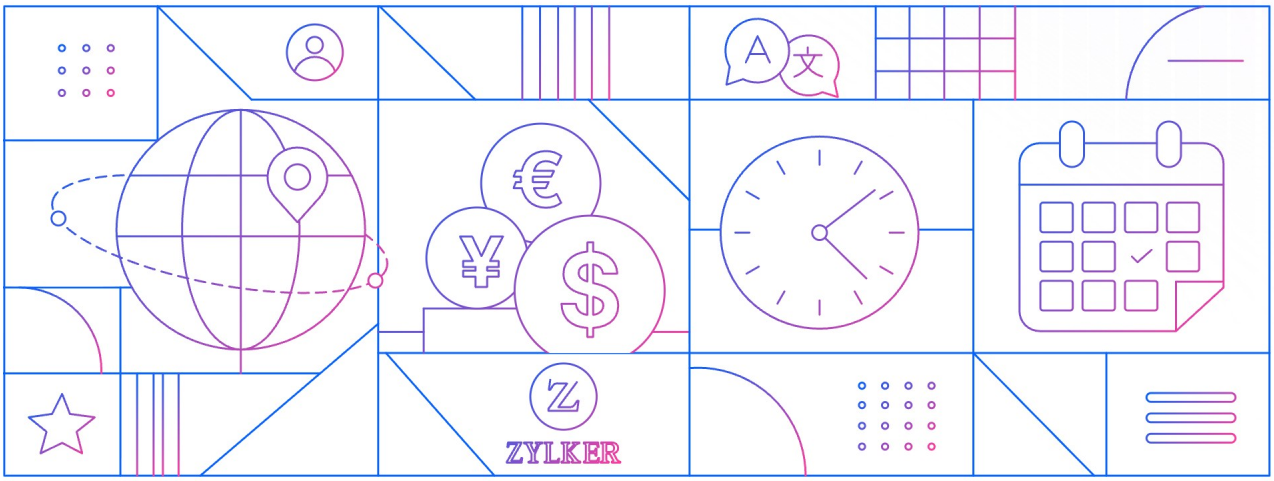
You can appoint a CRM owner who can coordinate the setup, answer questions, and keep track of changes, if your business warrants it. This person needs to understand your business process and be available to the team, but they don't have to build everything alone.

If your team already uses Zoho CRM, start by finding the point where work leaves the system. Perhaps records exist but follow-ups remain in personal calendars. You can address that gap before adding more features.

Now let's put all these into action. While how you use Zoho CRM will depend on your business needs and processes, a few essentials form the foundation of an effective setup. The following 12 aspects will help you get started and shape Zoho CRM around the way your team works.

Set up your company and personal details

Company information may seem like a small part of your setup, but it gives your team a consistent starting point. Your time zone, currency, and business hours also provide context for dates, amounts, and relevant scheduling settings.



Set the shared business details

Review your company settings and enter your business name, address, contact information, and logo. Check your organization's time zone and home currency before bringing in deal amounts or setting up reports.

Review your fiscal year and working hours as well. If your business uses a financial year that differs from the calendar year, reflect that in your setup. Configure business hours and holidays where they're relevant to your team's schedules and automation.

For example, a business operating in India should check that its home currency and time zone reflect its operations. A colleague working elsewhere may need different personal time settings. Review both levels so that the team interprets dates and meeting times correctly.

Keep personal preferences separate

Each user can review their personal settings, including their name, language, locale, and date and time preferences. Ask your users to complete these when they accept their invitations.

Also, a date written as "04/05" can be interpreted differently across regions. Agree on how your team will enter and read dates, particularly if you're importing information from spreadsheets.

Add regional complexity when it applies

If you sell in more than one currency, review the available multi-currency settings and how your business will maintain exchange rates. If you sell only in one currency, start with that. Your setup should reflect the business you operate.

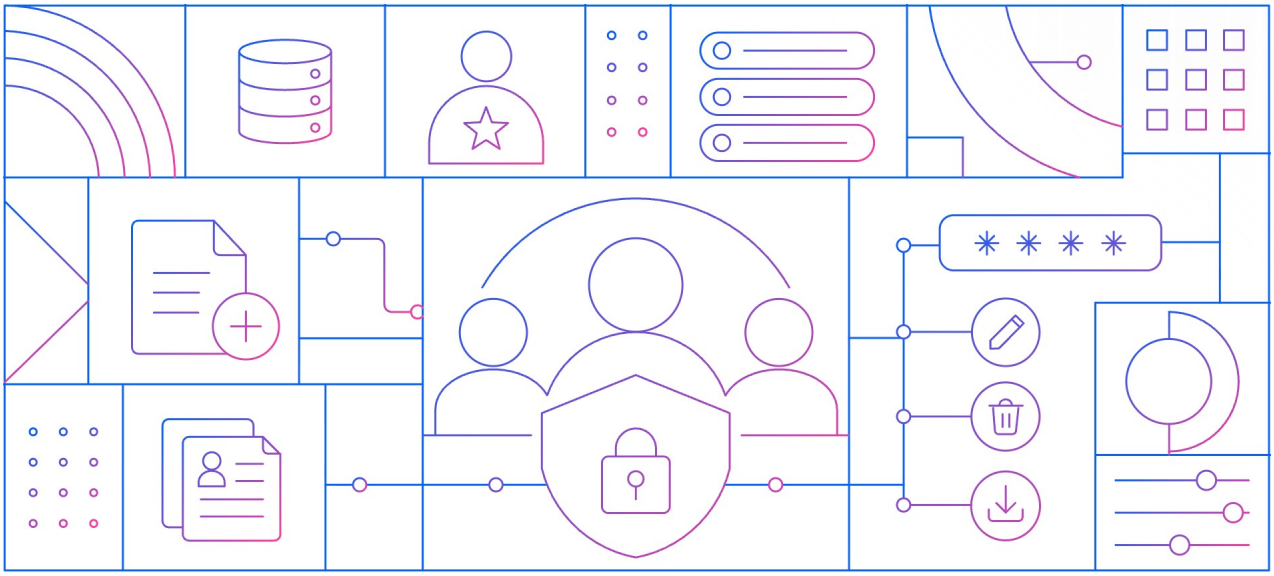
Set your business hours to reflect your team's working schedule. As you configure reminders and automated actions, review their timing settings to decide which should follow business hours and which should run at other times. Test each rule to confirm it runs when intended.

Resources

- → Managing CRM account settings - help documentation
- → Company settings - help documentation

Bring in your team and configure access

Your sales reps need sufficient information to work with customers effectively; your sales manager may need visibility across the team; the person administering the CRM needs access to configuration. Think through these responsibilities and invite everyone with the relevant permissions.



Understand roles and profiles

In Zoho CRM, a role places a user within your organizational hierarchy and helps determine record visibility. User profiles control which actions are available to that user, such as creating records, deleting them, importing data, or changing settings.

For example, your sales manager may need to see the records owned by their team, while your reps need to create and update customer records while having restricted access to exports or setup changes. These are different decisions, so review both roles and profiles. Record visibility also depends on your sharing configuration.

Keep the initial structure manageable

Start with the people who will actually use the CRM. Assign the appropriate roles and profiles, send invitations, and confirm that they can sign in. Give administrator access to the person(s) responsible for managing the system.

An owner-led business with two reps may need just a basic hierarchy. A solo user can begin without designing layers of management. Add complexity when responsibilities require it.

Also, agree on who owns a customer record when more than one person contributes. A shared customer relationship still benefits from having a clear person responsible for the next action.

Check access from a user's perspective

Ask a rep to open a sample lead and deal using their own account. Can they see the information they need? Can they edit the correct fields? Are they prevented from accessing records or actions outside their responsibilities?

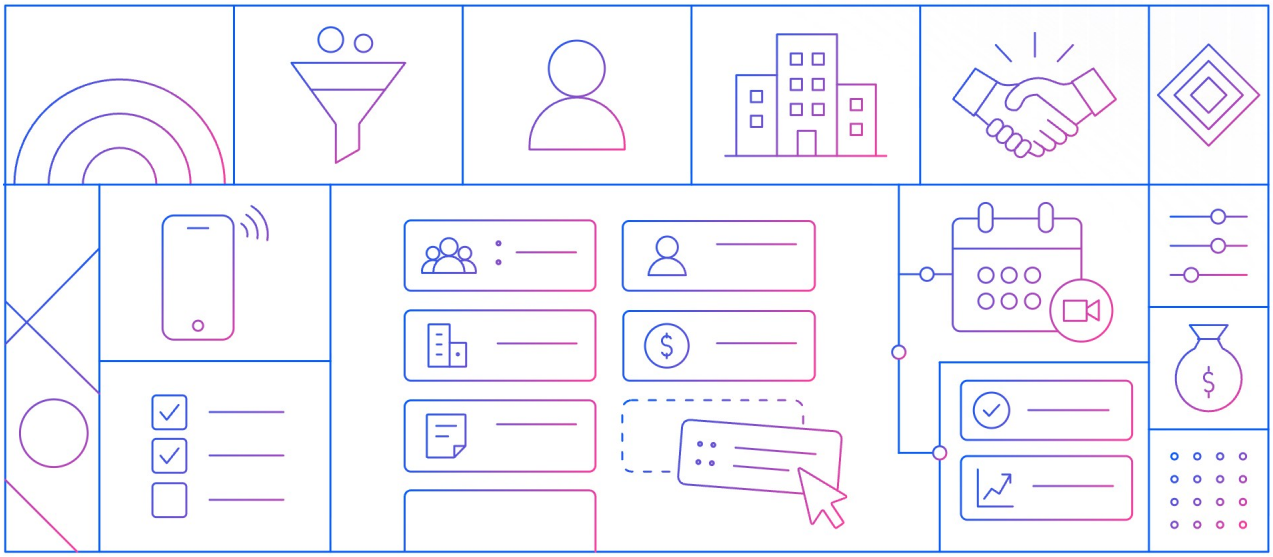
Do this before importing your full customer database. Confirm secure sign-in practices with your team, including multi-factor authentication, and keep user accounts individual so actions remain attributable.

Resources

- → Managing users - help documentation
- → Security controls overview - help documentation

Organize your modules and fields

Your CRM needs an appropriate place for each piece of information. In Zoho CRM, modules organize different types of information, records represent individual entries, and fields hold details within each record. A contact's email address is stored in a field in their record, alongside their other details. The Contacts module holds all these contact records.



Get familiar with the main modules

- The Leads module holds records of prospective customers whose interest or suitability you're still evaluating.
- The Contacts module holds records of the people you communicate with in a business relationship, including prospects and customers.
- Records in the Accounts module represent the companies or organizations you do business with.
- The Deals module tracks individual sales opportunities, including their values, stages, and expected closing dates.
- The Tasks, Calls, and Meetings modules help you organize and record the activities associated with these business relationships.

Keep in mind that a contact can be involved in more than one deal. For example, an office manager may first buy chairs and later discuss furnishing a new branch. You can track the opportunities separately while retaining the relationship with the same person.

Collect information your team will use

Review Zoho CRM's standard fields before creating new ones. For the furniture business, additional information might include product interest, seating quantity, and preferred delivery date. Choose a suitable field type, such as a picklist for product interest or a date field for delivery preference.

Keep required fields realistic. A rep may know a customer's email address at first inquiry but learn their budget only after a conversation. If you make fields mandatory that require details your reps are unlikely to have at record creation, they may guess the answers just to save the record or delay creating it until they have the information.

Arrange your layout so essential information is easy to find. Add useful list views, such as new inquiries or open deals owned by the current user. Create a custom module only when the information represents something the standard modules can't reasonably accommodate.

Preserve context during lead conversion

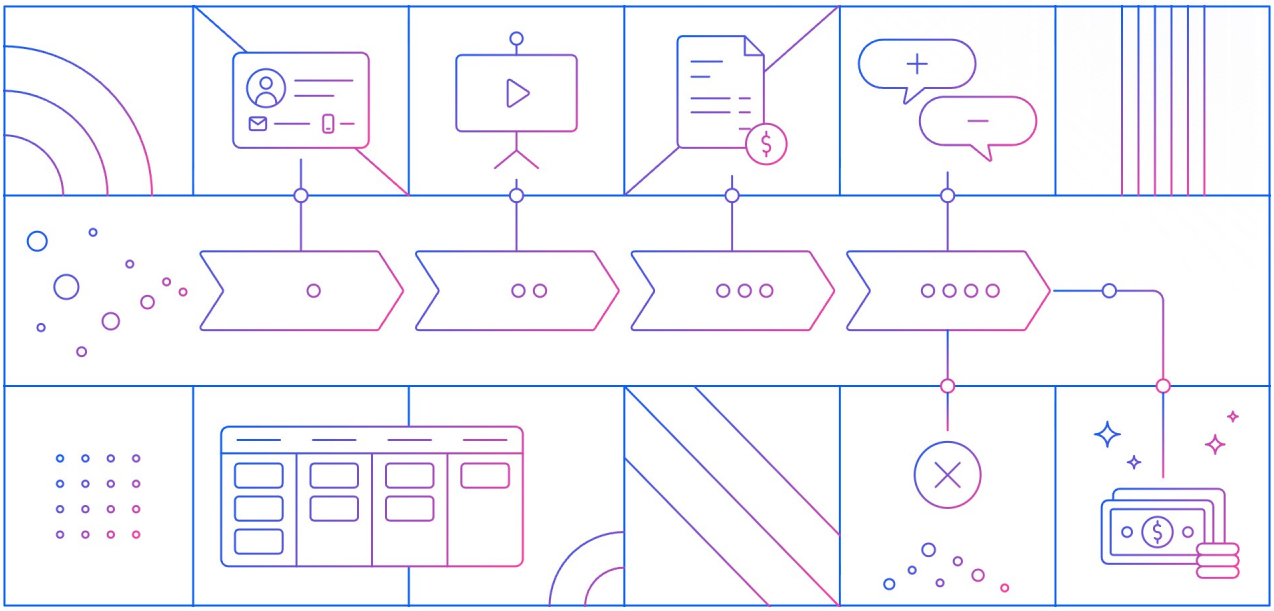
Decide when your team should convert a lead into a contact and, where applicable, into an account and deal.

Resources

- → Understand your CRM account - help documentation
- → Customizing modules - help documentation
- → Managing list views - help documentation
- → Converting leads - help documentation

Build a pipeline around your sales process

When someone asks how a sale is progressing, your team should be able to answer consistently. Having a pipeline helps because it enables you to place each deal in a stage that represents where it stands in your sales process.



Your stages should reflect meaningful progress; if two reps interpret the same stage differently, your pipeline will be harder to trust.

Give each stage a clear meaning

For the furniture business, for example, a simple deal pipeline could include the following stages:

- **Requirements confirmed:** The rep understands the products, quantity, and expected purchase timeline.
- **Quotation sent:** The customer has received a quotation for the agreed requirements.
- **Negotiation:** The customer is discussing price, delivery, or terms.
- **Closed Won:** The customer has confirmed the purchase according to your business's acceptance criteria.
- **Closed Lost:** The opportunity will not proceed, with the reason recorded.

These are suggested stages. A consultancy may include discovery meeting and proposal review stages, while a distributor may have a shorter process. Use the stages that help your team explain actual progress.

Lead statuses and deal stage serve different purposes. Lead statuses help you track inquiries while you evaluate them; deal stages track specific opportunities once you're pursuing sales.

Configure the pipeline in Zoho CRM

Review the Stage field in the Deals module and adapt the values to your process. Keep the opportunity's owner, amount, and expected closing date up to date as well.

Review stage probabilities if you use them for weighted revenue estimates. Treat them as estimates, as a stage probability doesn't guarantee that a deal will close.

Start with one pipeline if your opportunities follow a similar process. Consider multiple sales pipelines when distinct sales processes genuinely require different stages.

Try the stages with real situations

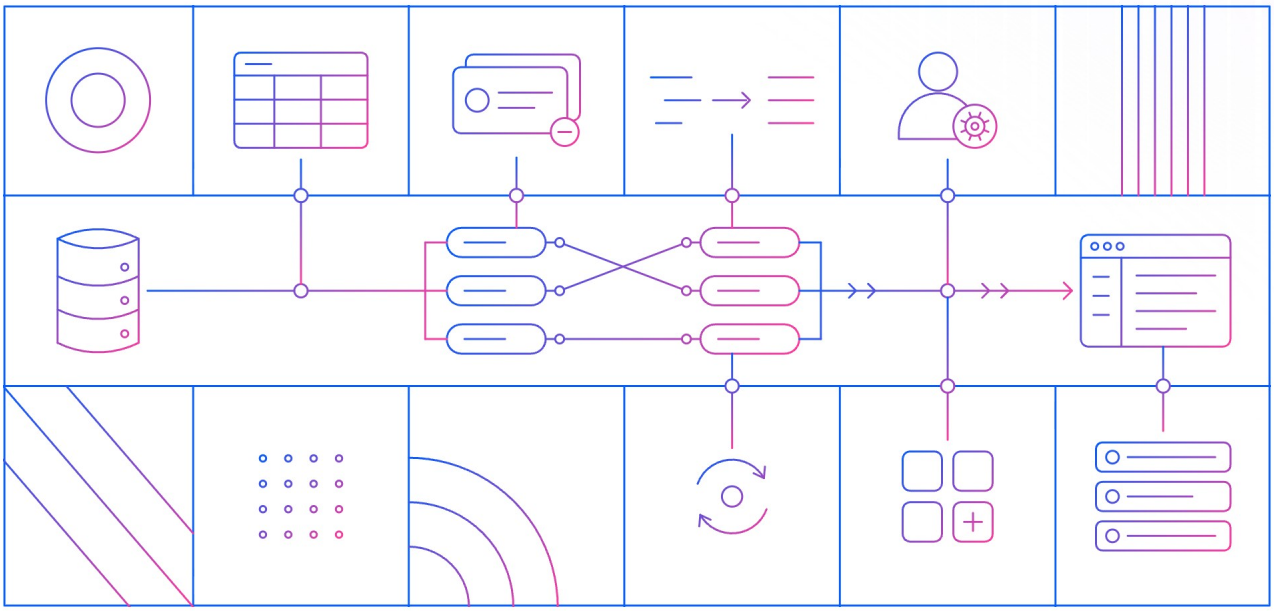
Take a recent sale and a lost opportunity through the proposed stages. Can your reps agree on where each belonged? If a stage is difficult to explain, simplify it before building automation around it.

Resources

→ Managing sales pipelines - help documentation

Prepare and bring in your data

Your existing customer information gives your team a head start. Bringing it into CRM is also a good opportunity to check what's still useful, remove avoidable duplication, and give each record a clear owner.



Choose the right way to bring it in

If you're starting with spreadsheets, use the relevant module's import option. If you're moving a connected set of records from another CRM, review the data migration option and the guide for your source system.

If you already have records in Zoho CRM, check whether you need to add records or update existing ones. Re-importing everything as new can create duplicate customer histories.

Prepare a small representative sample

Make a copy of your source data and keep the original. Then:

- Remove obvious duplicates and records you don't need to move.
- Standardize dates, phone numbers, and values such as lead source.
- Check that required fields contain valid information.
- Match source columns with the fields you've configured.
- Identify record owners and preserve the identifiers needed to link related records.

For example, a company's contacts and deals should remain associated with the correct account record.

Verify before moving the full set

Use a small batch containing different situations, such as an open opportunity, an existing customer, and a company with two contacts. Review field mapping, duplicate handling, and whether automation should run during the import.

Open the resulting records. Check dates, amounts, owners, relationships, and any notes or attachments included in your transfer. Review the import summary for skipped records and investigate the reasons before continuing.

Updates to existing records made through import can't simply be undone using Undo Import. Be especially careful when choosing update options.

For a migration, agree on when your team will stop updating the old system and start using Zoho CRM. Plan how changes made during the transfer will be handled.

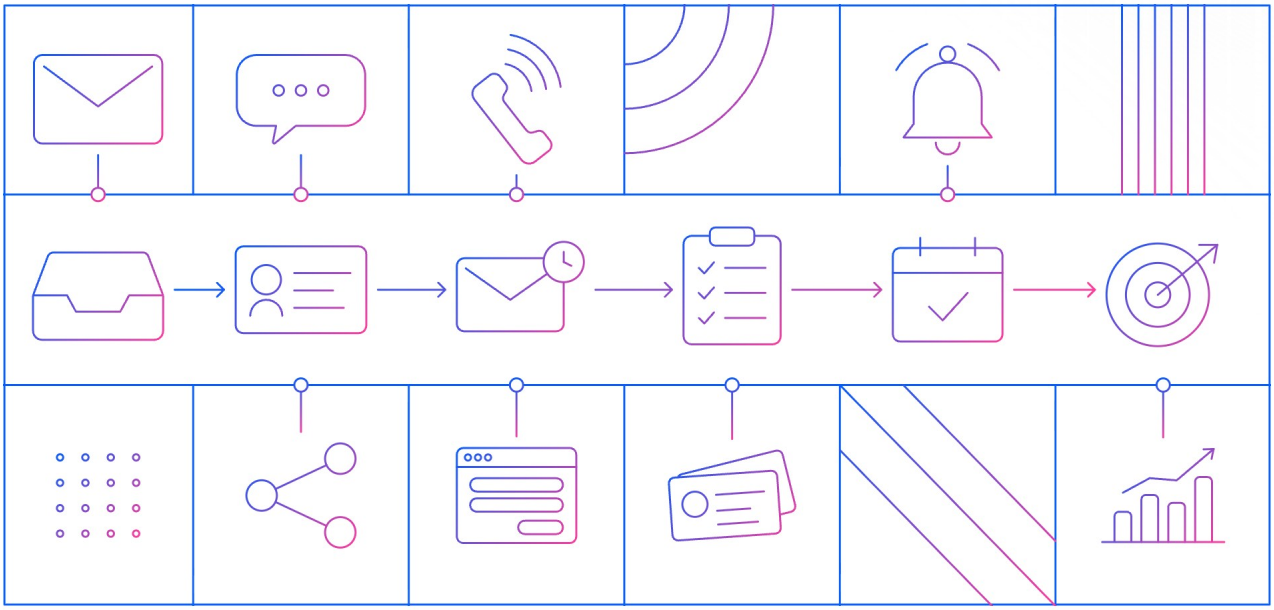
Resources

- → Import data into a CRM module - help documentation
- → Data migration overview - help documentation

Set up lead capture and customer communication

Moving existing data into CRM gives you a starting database. You also need a reliable way to bring in tomorrow's inquiries and keep the resulting conversations accessible to your team.

Start with the channels your customers actually use. Email may be enough initially, but your business may also rely on phone calls, website forms, WhatsApp, social media channels, or live chat.



Give incoming inquiries a clear destination

For each important inquiry source, decide how the information will enter CRM, which details you need, and who will respond.

A website visitor asking about office chairs might provide their name, email, product interest, and quantity. A webform can capture those details in CRM. Configure the destination module, ownership, and any acknowledgment you want to send.

Test the form yourself. Check that a record appears, the right rep receives it, and the customer sees the intended confirmation. For referrals or phone inquiries entered manually, agree on who creates the record and assigns the next action.

Connect email and check visibility

Set up the right email configuration to connect the appropriate mailbox based on what your provider supports. Each user who needs a connected mailbox should complete their configuration.

Review sender details, signatures, and email sharing settings. If your setup requires sender-domain authentication, ask the person managing your business domain to add the authentication records from Zoho CRM to your domain's DNS settings, to help email providers recognize emails sent through Zoho CRM as legitimate. Once added, verify the setup in Zoho CRM. Send a test message and reply to confirm that the conversation appears against the intended record and is visible to the intended users.

Connect other channels as needed

Add your phone system or messaging channels when they support your actual customer work. Check the relevant provider, account, and edition requirements before configuring them.

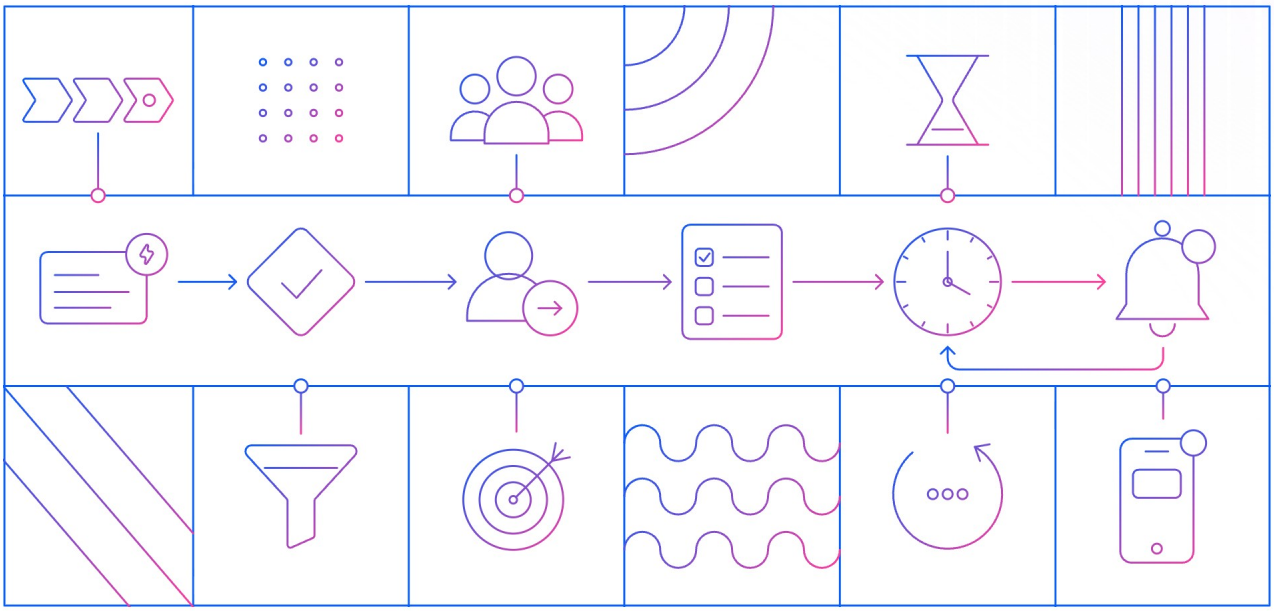
Until a channel is connected, ask reps to record important conversations and schedule the next action manually. The goal is to keep the customer context available even when an interaction happens elsewhere.

Resources

→ Connect with customers - help documentation

Automate the follow-ups that matter

Once your records and process are clear, look for work your team frequently repeats. A small amount of well-chosen automation can make it easier to respond consistently and keep the next action visible.



Start with a specific trigger and action

Consider a quote follow-up. Your rep changes the deal stage to Quote Sent, and you want Zoho CRM to create a task reminding the rep to follow up after an agreed interval.

Describe the rule in plain language before configuring it: When the deal first moves to Quote Sent, create a follow-up task for its owner with the appropriate due date. Decide what should happen if the deal is edited again or later moves out of that stage.

Other useful starting points include an internal notification for a new inquiry or a task when a customer requests a callback. Choose the action that solves your immediate problem.

Use the appropriate automation

Workflow rules respond to configured triggers and conditions with actions such as tasks, email notifications, or field updates. Select the module, trigger, criteria, and action, then test the result.

Assignment rules help route records entering through supported sources, including imports, webforms, and APIs. Don't assume the same rule will run when a rep manually creates a record. Check how ownership is handled for each source you use.

For example, website inquiries about office seating furniture could go to whichever rep handles that product. An inquiry without a product selection still needs a fallback owner.

Check repetition and timing

Test what happens when the record meets the criteria, when it doesn't, and when it's edited again. You don't want a new follow-up task every time a rep corrects a phone number.

Check scheduled actions against your business hours and time settings where relevant. Give each rule a clear name and description so the next person managing CRM understands why it exists.

More structured process controls can be considered when your team needs them. Your first setup can begin with a few reliable rules.

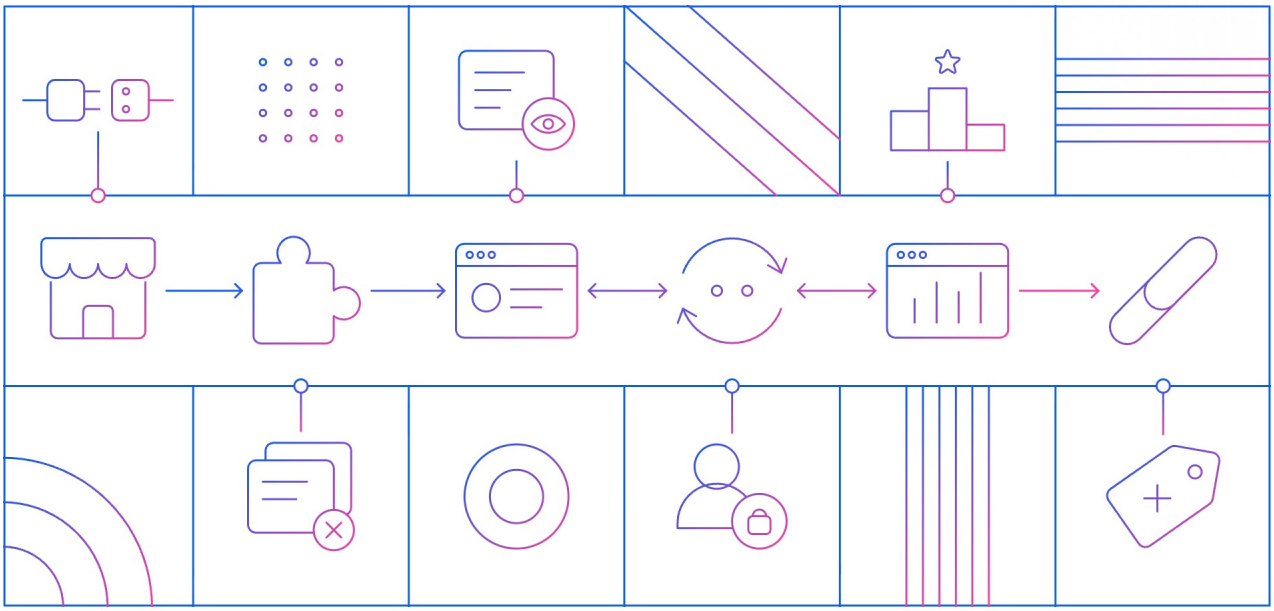
Resources

- → Configuring workflow rules - help documentation
- → Configuring automatic actions - help documentation
- → Setting up assignment rules - help documentation

Connect the business apps you need

Your team may already use other applications for support, marketing, accounting, or scheduling. Connecting the right ones to your CRM can reduce re-entry and make relevant customer information easier to find.

Start with a specific information gap. If reps need to know whether a customer has an unresolved support issue, connecting your help desk may be more useful than adding several unrelated integrations.



Decide what the connection should accomplish

For each integration, answer a few practical questions:

- Which records and fields need to move or become visible?
- Should information flow one way or both ways?
- Which application should be treated as correct when values differ?
- How will existing records be matched to avoid duplication?
- Who needs access, and who will maintain the connection?

With the Zoho Desk integration, for example, you can configure account and contact synchronization and access to related support tickets. Review the matching fields, sync direction, and ticket visibility before enabling the setup for your team.

Choose the supported integration route

Check the Zoho Marketplace and the relevant product documentation for the applications you use. Mailchimp or QuickBooks may be part of your business, but the appropriate connector depends on your requirements and the product version involved.

Review what the connector actually supports, who provides it, any additional charges, and the kind of access it requests. Installing a connector doesn't necessarily make every field available or keep every record synchronized.

Test both the first sync and later changes

Use a small set of records. Check what happens when you create a customer, change an email address, or update a mapped field. Confirm that the intended people can see the information and that the connection isn't creating duplicate records.

For marketing integrations, preserve email opt-outs and subscription preferences. For accounting information, decide which financial details sales users need to see and which should remain restricted.

If your business can begin effectively without an integration, keep it for the next stage. Add it when the benefit is clear.

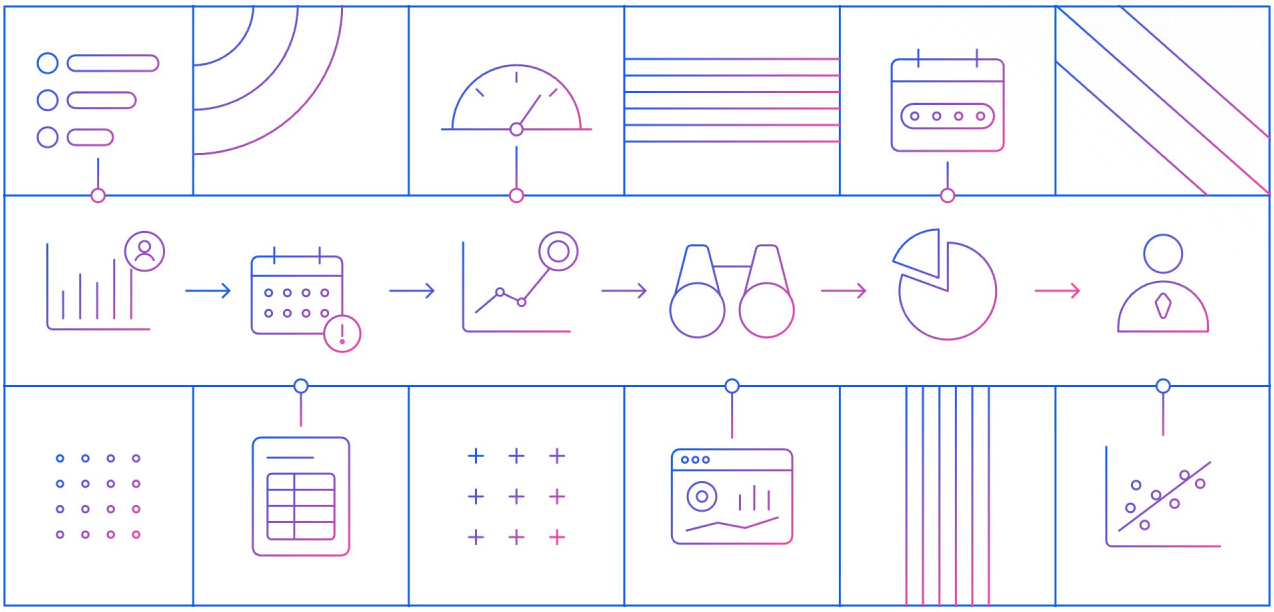
Resources

- → Zoho marketplace
- → Extensions for Zoho CRM - help documentation

Set up reports you'll actually use

Once information starts flowing into your CRM, your team needs a way to see what deserves attention. Start with the questions your business regularly asks and build reports that help answer them.

Your first dashboard can be small; it just needs to help someone make a decision.



Choose a few useful questions

For a furniture business, a sales manager might begin with:

- How many new inquiries arrived this week, and who owns them?
- Which follow-up tasks are overdue?
- What is the value of our open deals at each stage?
- Which deals are expected to close this month?
- What did we win or lose during the selected period?

A rep may need a simpler view focused on their own tasks and opportunities. Choose reports based on the person's responsibilities.

Make the definitions clear

A report called Sales This Month could mean deals created this month, deals expected to close this month, or deals actually won this month. Specify the date field, stage filters, and amount being measured.

Likewise, pipeline value is not the same as money received. A won deal in your CRM shouldn't automatically be interpreted as an accounting receipt. Give each report a name that makes its meaning clear.

If you measure conversion rates, agree on the starting population and the outcome. A new team can begin with simple counts and values while establishing consistent data entry.

Build and verify the view

Review the standard reports first. Where you need a custom report, select the relevant module, columns, filters, and grouping. Use a chart when it makes the result easier to read, then add useful components to a dashboard.

Check a few report totals against the underlying records. Share the reports and dashboard with the people who need them, then confirm their access using their own accounts.

Zoho CRM's built-in reporting is a practical starting point. Consider a separate analytics application later if you need broader reporting across multiple systems.

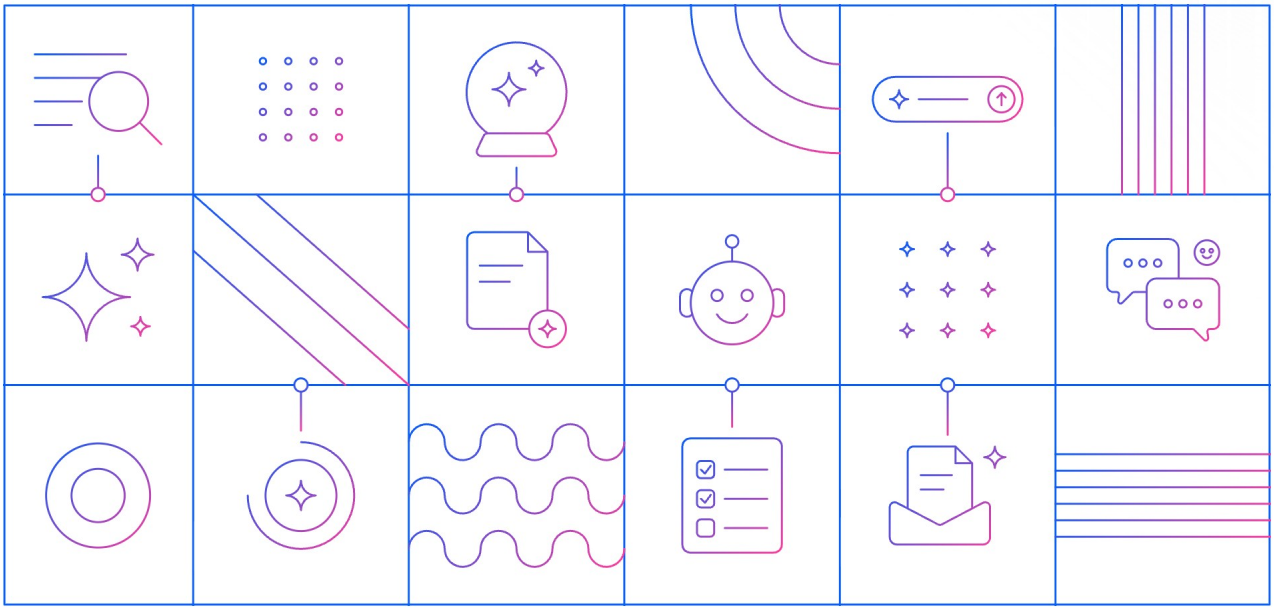
Resources

- → Understanding and building reports - help documentation
- → Creating dashboards - help documentation

Choose useful AI assistance and agents

As your team starts working in Zoho CRM, you may find tasks where AI can help. A rep may need to understand a long customer conversation quickly. Your business may need a custom way to review inquiry notes. Start with the task and choose the capability that fits.

AI and agents are optional for your initial launch. You can use them early when there's a clear benefit, or return to them after your basic process is working.



Begin with Zoho CRM's built-in capabilities

Zia provides AI capabilities within Zoho CRM, including assistance with information, conversations, and insights. Check what's available in your account and start with one feature that helps your team with an everyday task.

For example, an available summary feature could help a rep prepare for a customer conversation. Review the output against the underlying information. Some predictive capabilities require sufficient relevant historical data, so a new account may need time before they become useful.

Choose an agent for a defined responsibility

With Zia Agents, you can deploy a suitable pre-built agent or create a custom one. A possible first agent could review selected lead notes, identify missing qualification information, and prepare a response for the rep to review.

Define its inputs, expected output, and limits. If it should only draft an email, don't give it an unrestricted email-sending responsibility. Configure the review step and tool access accordingly.

Set up a small pilot

Connect the appropriate Zia Agents portal to Zoho CRM. In Zia Agents, configure the instructions, relevant knowledge, permitted tools, and authenticated connections. Test with representative CRM records before deployment.

Choose the agent's identity and access deliberately. Connections use configured user identities and permissions, so check its authentication mode. A digital employee has its own identity, role, and profile. Identity and the conditions that trigger the agent are separate choices.

After deployment, configure the intended access or trigger in CRM and confirm that the right users can invoke it. Check the results and activity history with a small group before expanding use.

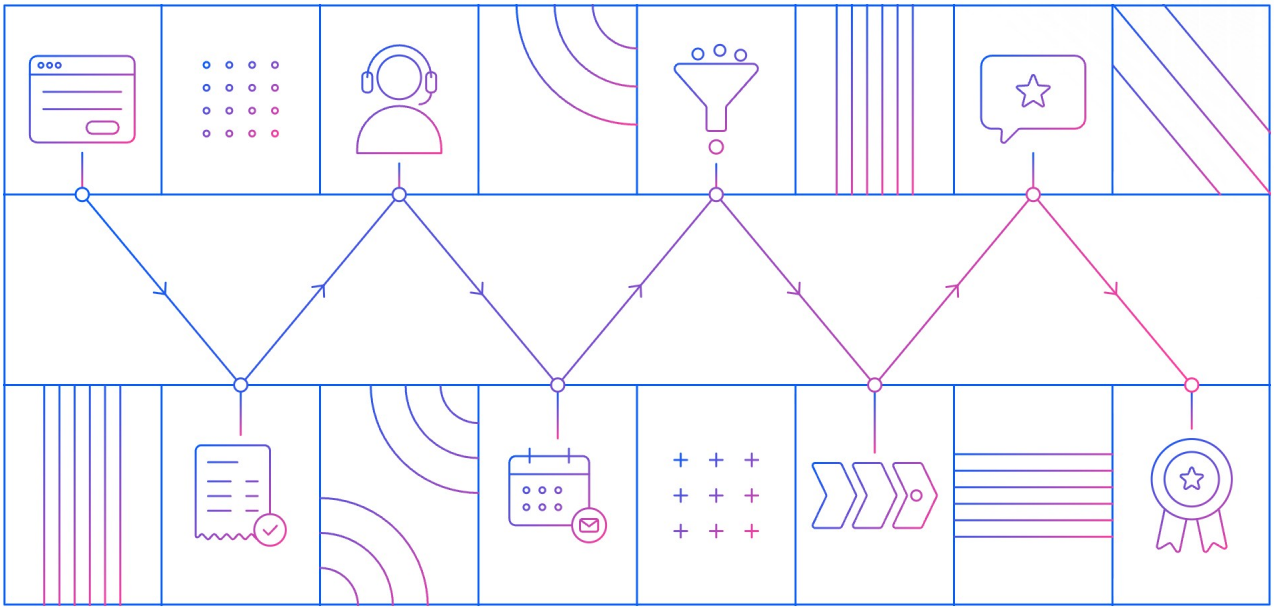
Resources

- → Zia in Zoho CRM - help documentation
- → Zia Agents in Zoho CRM - help documentation

Test a complete customer journey

Individual settings can look correct while the complete process still has gaps. A form may capture an inquiry, but assign it to the wrong person. A workflow may create a task, but repeat it every time the deal changes.

Before your team relies on the setup, take a sample customer through the journey you expect to support.



Follow one inquiry through to a decision

Use clearly identified test records and email addresses controlled by your team. For the furniture example, try the following:

1. Submit an inquiry through the website form or your chosen intake method.
2. Confirm that the expected information reaches the correct module and owner.
3. Sign in as the assigned rep and check the record's visibility and available actions.
4. Record a conversation, schedule a task, and send a test email where applicable.

5. Qualify and convert the lead if that's part of your process. Verify the resulting records and mapped information.
6. Move the deal through the relevant stages and check any automated tasks or notifications.
7. Review the linked app information and AI output if you've enabled those capabilities.
8. Mark the test deal won or lost and check the relevant reports.

You should be able to explain what happened at each step, who is responsible, and where the information can be found.

Test the situations most likely to cause confusion

Submit an inquiry without optional information. Try a duplicate email address. Create a lead manually as well as through the form. Edit the same deal twice and check whether automation behaves as intended.

For a migration, compare representative records with the old system. Check customer relationships, owners, dates, notes, and attachments that were included in the transfer.

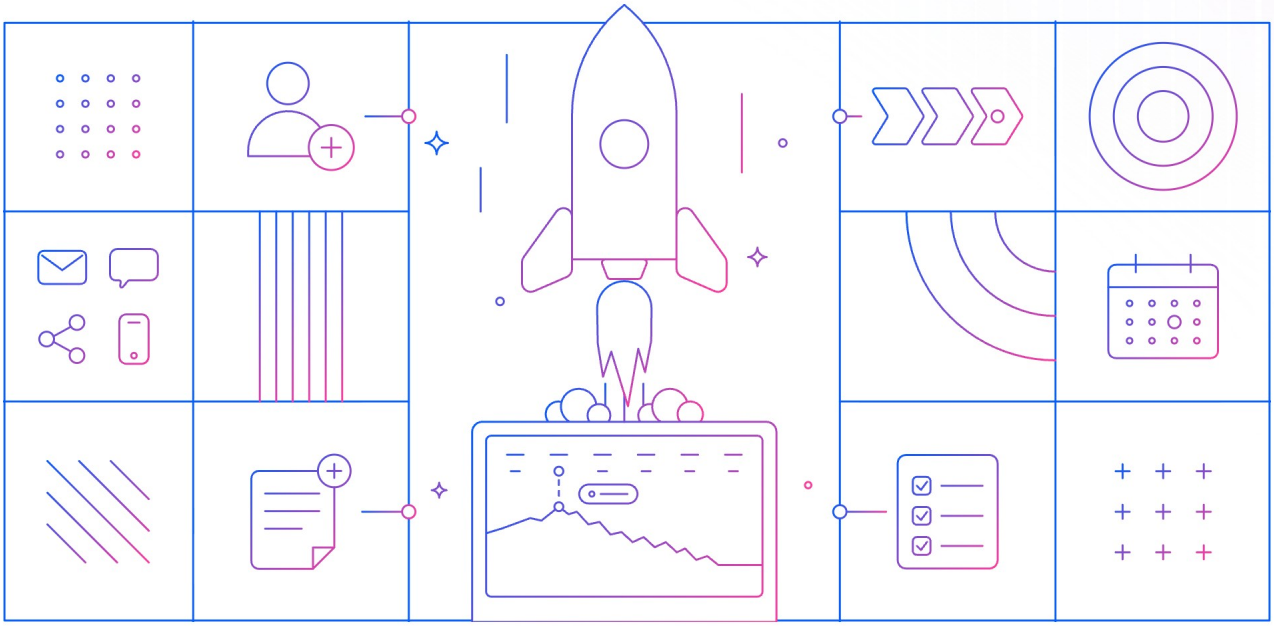
Ask a rep and a manager to participate using their own accounts. Testing only as an administrator can hide access problems that other users may encounter.

Fix the gaps before expanding use

Keep a short list of issues, who will resolve them, and what needs to be retested. Avoid sending test messages to actual customers. When testing is complete, remove or clearly exclude the sample records from your live reporting.

Get your team ready and start using Zoho CRM

Your setup becomes useful when your team can use it comfortably during actual customer work. Give people a chance to practice the activities they perform every day, with examples that resemble their own inquiries and deals.



Teach them how to do the work they need to do

Walk your reps through finding a customer, adding an inquiry, recording a conversation, updating a deal, and scheduling the next action. Show them the views and reports that help organize their day.

Ask each person to complete a small practice journey. A rep should be able to receive an inquiry, record what the customer needs, and schedule a follow-up. A manager should be able to find opportunities needing attention and understand who is handling them.

Use the Tasks, Calls, and Meetings modules to keep activities connected to the relevant customer records. If your team works on the move, include the Zoho CRM mobile app in this walkthrough.

Agree on a few daily habits

Keep the expectations practical:

- Add new inquiries via the agreed method(s).
- Record important customer discussions while the details are fresh.
- Keep each active opportunity's owner, stage, and next action current.
- Complete tasks when the work is done, or reschedule them with a reason.
- Check for an existing customer record before creating another one.

Managers should use CRM during sales reviews so the information your team maintains becomes part of actual decisions. If everyone is still asked for a separate spreadsheet, understand what's missing from Zoho CRM and address it.

Support the first days of use

Set a clear date for beginning work in Zoho CRM. If you're moving from another system, tell the team where new updates belong and who handles questions about historical data.

Keep the CRM owner available for questions and collect issues in one place. After the first week, review a few records with the team. Look for missing follow-ups, confusing fields, duplicate entries, or rules that create unnecessary work.

Make small changes based on those observations. If your team already uses Zoho CRM, the same exercise can help you improve adoption without restarting the implementation.

Resources

- → Your first day as a CRM user - help documentation
- → Activities - help documentation
- → Zoho CRM mobile app - help documentation

Your CRM is ready for everyday work

You have a useful starting setup when an inquiry can enter your CRM, reach the right person, and move through your sales process with its context intact. Your reps can see what they need to do next, and your manager can understand what is progressing.

Before you begin, use this quick checklist with your team. Mark each item complete, or record why it is not needed yet.

- [ ] Your initial business goals and CRM owners are clear.
- [ ] Your company, time, currency, and personal settings are correct.
- [ ] Users can sign in with the intended access.
- [ ] Your modules and fields capture the information you need.
- [ ] Your pipeline stages have agreed meanings.
- [ ] Your data has been checked for accuracy, ownership, and relationships.
- [ ] New inquiries have a reliable capture and follow-up process.
- [ ] Your main communication channel works as expected.
- [ ] Enabled automation has been tested for timing and repetition.
- [ ] Necessary integrations have passed sample sync and access checks.
- [ ] Reports answer your initial business questions.
- [ ] Any AI or agent pilot has clear limits and output review.
- [ ] Your team has completed a sample customer journey and knows where to get help.

An integration or AI pilot can remain on your list for later if your team can work effectively without it. Focus first on a setup you can use consistently.

As your business changes, Zoho CRM can change with it. A new sales process may need another pipeline. Repeated manual work may justify a workflow or an agent. New reporting questions may call for additional fields.

Let those needs guide your next changes. For now, begin with your next inquiry, record the conversation, and make the next action clear. Build a CRM system that is truly yours with Zoho CRM.



SIGN UP FOR FREE

Need help with getting started
with your CRM system?
Help is at your disposal.

Get in touch with us at
support@zohocrm.com.



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