ZOHO

Zoho CRM

CRM from Foundation to advanced

Zia Intelligence



Summary

Duration: 4 days | 7-8 hours (Inclusive of breaks)

About the training:

The Zoho CRM for Administrators training program offers an in-depth, virtual classroom experience to help administrators efficiently set up and manage their businesses using Zoho CRM. This training covers the latest features and enhancements of Zoho CRM and includes hands-on sessions with the product.

Who it is for?

This training is open to Zoho customers interested in learning about Zoho CRM. It's especially beneficial for business owners and CRM administrators responsible for setting up, configuring, and maintaining their organization's Zoho CRM software. Discover how Zoho CRM can enhance your business operations and support a successful customer journey.

Training Delivery and Format:

The training sessions will be delivered exclusively in English, using general examples and use cases from industries such as fitness, automotive, and education. These sessions are intended to offer a broad overview with industrial examples—they're not tailored to specific business requirements. Trainers will not be able to assist in customizing your CRM for individual business needs. Each session will run for seven hours daily over four days, with a 30-minute break included (7 hrs | 4 days).



Core Setup & Basic Administration

General Settings

- Personal Settings
- Company Details

Sales Process Automation

- Leads, Contacts, Accounts, Deals, and Campaigns
- Activities (Tasks, Meetings, and Calls)
- Calendar Booking

Make it Easy Using Zia

- Record Summary
- Data Enrichment (Web + Email Signature)
- Similarity Recommender
- Next Best Experience
- Best Time to Contact
- Best Time to Contact Analytics
- Recommendation Builder and Analytics

- Churn Prediction
- Field Prediction

Inventory Management

- Products, Quotes, Invoices, and Sales Orders
- Purchase Orders, Price Books, and Vendors
- CPQ and Zia recommendations in CPQ

Support

- Cases and Solutions

Users and Control

- Users
- Security Control
- Compliance Settings
- Territory Management

User Interface

- All mass actions (Emails, Field Updates, Changing Owner, Conversion)
- Macros
- Manage Tags
- Merge Duplicates



Basic Customizations

- List View
- Kanban View
- Canvas View
- Image to canvas using Zia
- Advanced Filters
- Business Card View

Advanced Customizations

- Team Spaces
- Modules and Fields
- Module creation using Zia
- Team Modules & Requests
- Prompt Builder for Custom Buttons
- Templates and content creation using Zia smart prompt
- Wizards

- Kiosk
- Pipelines
- Related List Customization
- Copy Customization
- Customize Home page
- Translation



Channels & Automation

Channels

- Emails

AI for Emails

- Email Sentiment Analysis
- Email Intent and Custom Intent Detection
- Email Emotion Analysis
- Email Activity Extraction
- Email Summary, Competitor Alert and Autocomplete
- Email Subject Line Suggestion and Translation
- Zia Writing Assistant (Blue Pencil)

- Zia Competitors alerts
- Telephony
- Call Transcription and Call Intelligence (Sentiment, Intent, Emotion, Summary) using Zia
- Social
- Chats
- Signals
- Portals

Automation

- Workflow and Actions
- Workflow creation using Zia
- Cadences
- Schedules
- Assignment Rules
- Case Escalation Rules
- Scoring Rules - Manual and Zia scoring
- Marketing Attribution
- Segmentation



Process Management & Data Administration

Process Management

- Blueprint
- Approval Processes
- Review Processes
- Connected Workflow

Experience center

- Signals and Zia Notifications.
- CommandCenter 2.0

Data Administration

- Import (module-specific and data migration from other CRM)
- ICR by Zia
- Export
- Data Backup
- Storage
- Recycle Bin

- Audit Log
- Sandbox

Marketplace

- All
- Zoho
- Google
- Microsoft

Other Modules

- Reports and Dashboards
- Reports and Analytics component suggestion by Zia
- Strategy Influencer (Target Contributors, Anomaly Finder, Gap Analyzer, Predictor, Prescriptor)
- Voice of the Customer (VoC)
    - Response-based Sentiment Analysis
    - Sentiment-based Profile Analysis
    - Competitor Analysis
    - Cross-sell and Survey Analytics
    - RFM Segmentation Analytics
- Forecasts and AI forcasting using Zia
- Zia Presentation

- Feeds
- Motivator
- Mobile Apps
    - CRM Mobile App
    - CRM Analytics App
- Zoho Directory
- Single Sign-On (SAML)
- Security Policies
- Active Directory Sync
- Login History

Other Zia in Zoho CRM

Vision AI

- Image Validation (Classification and Detection)
- Duplicate Image Detection
- Intelligent Character Recognition (ICR)
- Zia Models, Zia Agents, Custom AI Studio and Usage Data.