

Zoho CRM for Administrators Complete Course Plan



About:

This course offers fundamental and advanced configuration training for new Zoho CRM Admins. Learn how to set up processes, data security settings, and automations. Gain a deep understanding of customization & integration options to tailor Zoho CRM to your requirements.

Who it is for:

System admins who are responsible for the setup, configuration, and maintenance of their organization's Zoho CRM software.

Day One

Module 1: **Introduction**

- Welcome to Zoho CRM
- Benefits of CRM
- Pre-requisites
- Learning path

Module 2: **Organization Settings**

- Company details
- Fiscal year
- Business hours
- Currencies

Module 3: **Data Security**

- Two-factor authentication
- IP restrictions
- Access logs
- Data encryption

Module 4: **User Management**

- Overview
- Users
- Profiles
- Role-based hierarchy
- Groups
- Data sharing rules

Module 5: **Customization - I**

- Overview
- Standard Modules
- Rename Tabs
- Fields
- Relationship fields
- Stage and Probability mapping
- Validation rules
- List views
- Related lists
- Custom links
- Custom buttons
- Web tabs
- Templates
- Home Tab
- Tab groups

Day Two

Module 6: **Communication Channels**

- Overview
- Email
- Telephony
- Social Media
- Chat
- In-person
- SalesSignals

Module 7: **Territory Management**

- Sales territories
- Forecasting
- Sales performance management

Module 8: **Automation - I**

- Overview
- Set up workflow rules to automate routine actions
- Lead assignment rules
- Lead scoring rules
- Lead automation through Social media
- Lead automation through email

Module 9: **Data Administration**

- Standard operations
- Import

- Web forms
- Data deduplication
- Backup
- Storage
- Data Migration from third-party applications

Module 10: **Marketplace**

- Overview
- Standard Zoho CRM Extensions
- Zoho Apps
- Google Apps
- Office 365
- Other Apps

Day Three

Module 11: **Customization - II**

- Page layouts
- Sub forms
- Conditional layouts
- Widgets*
- Sandbox
- Translation Bench*

Module 12: **Zia**

- Zia Voice
- Zia Chatbot

- Best time to contact prospects
- Trends and anomaly detection
- Macros suggestion
- Workflow notification

Module 13: **Automation - II**

- Blueprints
- Approval Processes
- Custom Functions
- Custom Schedules

Module 14: **Portals**

- Understanding Portals
- Setting up Portals

Summary

- A Day in the life of CRM Administrator
- Best practices in CRM Administration
- Sharing training experience
- What's next?



For more information

Email: training@zohocrm.com