Enviro-Master Services

Retain → Grow → Gain

Enviro-Master International Franchise, LLC
3-26-2019

The Ultimate Guide to ZOHO CRM

Mobile Application

Desktop Version

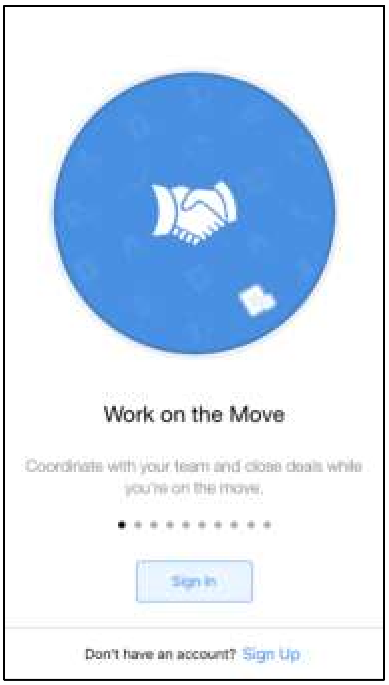
The Ultimate Guide to ZOHO CRM for All Devices

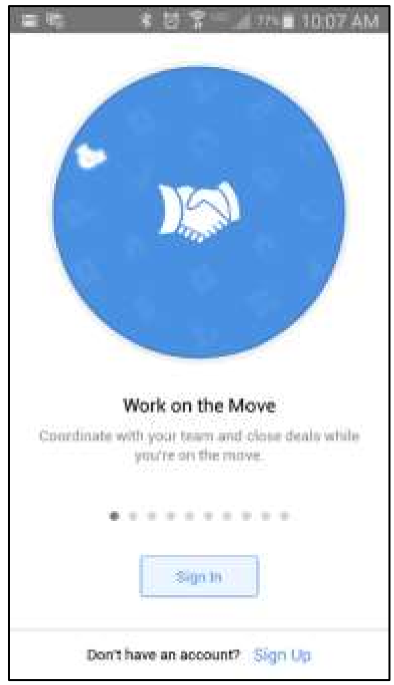
Laptop Android
iPhone

Downloading & Signing into the Mobile Application

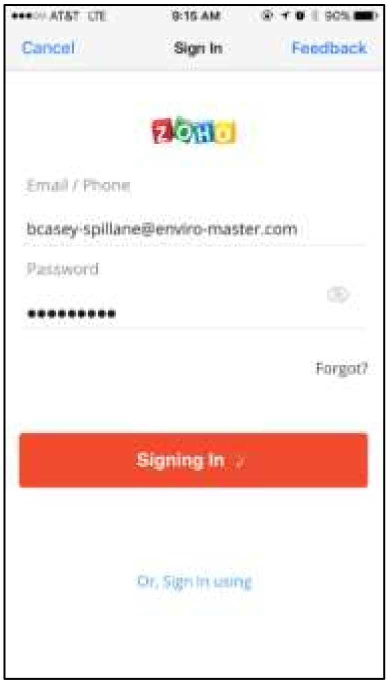
Apple product images are displayed on the left. Android product images are displayed on the right.

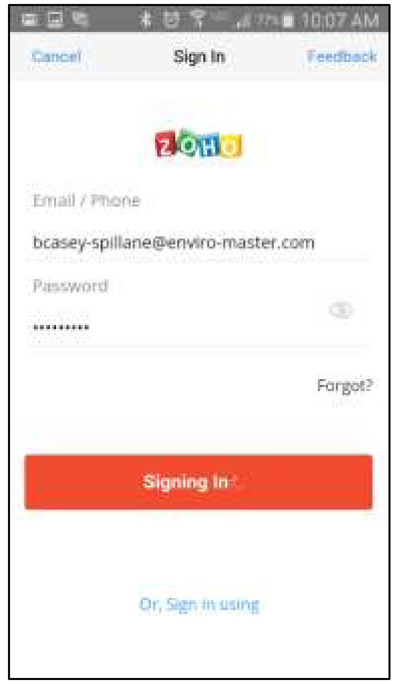
In the App Store or Google Play Store, search "ZOHO CRM" to find and download the app. Once downloaded, locate the app on your phone and open. Please login to the app by clicking "Sign In" as shown below.





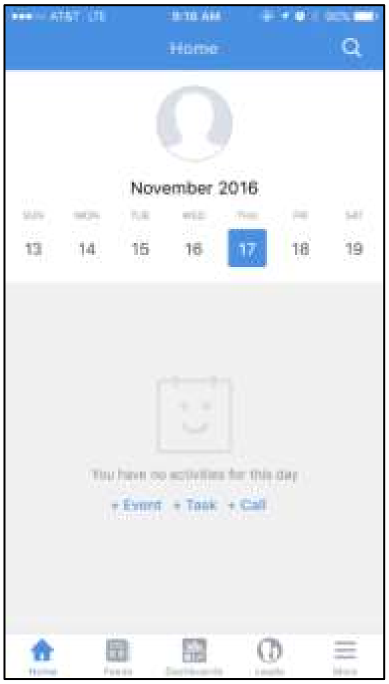
Enter your username and password. Your username is always your Enviro-Master email address and the standard password is Passc0de. Click Sign in again.

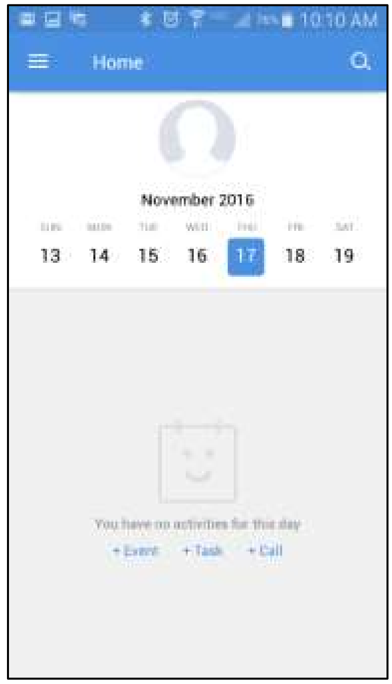




Your phone will sync your data from the desktop version. Please note, that it is a good idea to Reset your app daily to ensure that you always have the most up to date information.

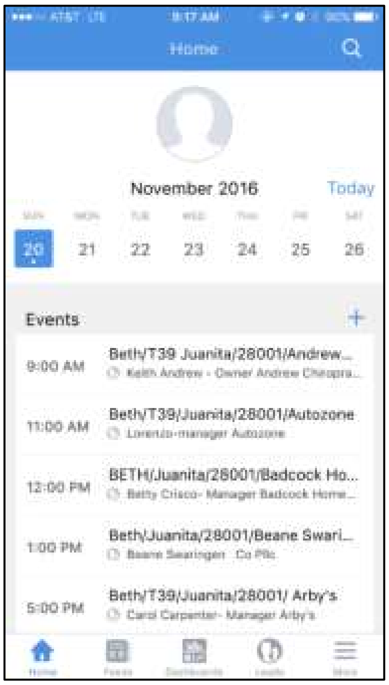
When your app opens, you will have a view of your events for the day, and the ability to toggle through your week as shown below. Any day that you have an event will have a small dot under the date. If this is your first time using the CRM, you will see a blank screen as shown below.

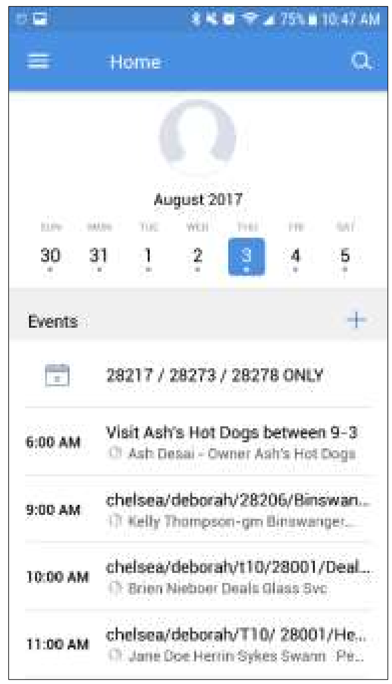


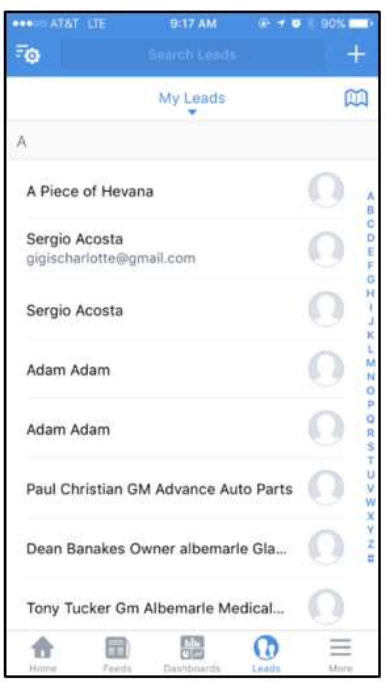


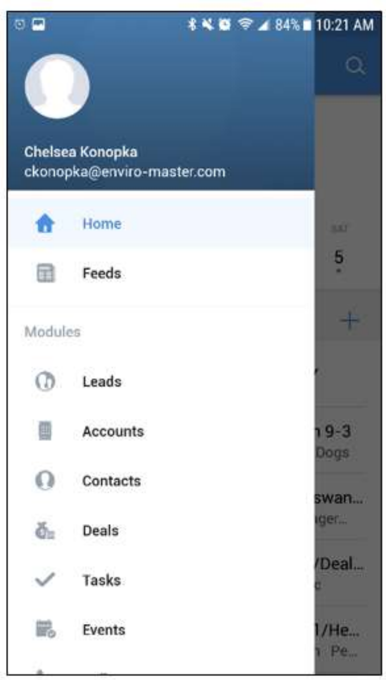
Adding Cold Call Leads

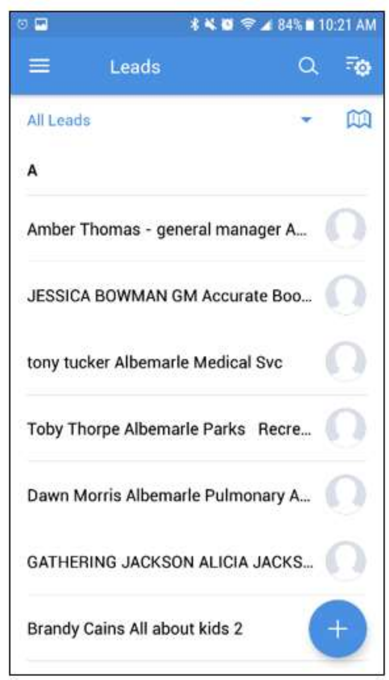
From your home page, you will need to go into your Leads Module to add in new leads. On your iPhone, click Leads at the bottom of your screen. It will be the 4th icon from the left. On your Android, click the 3 Horizontal lines on the top left of your Home Screen. This will open your Menu. From there, Select Leads to open your Leads Module.



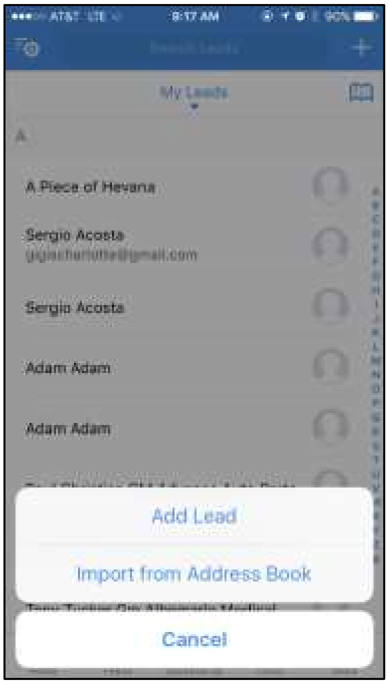


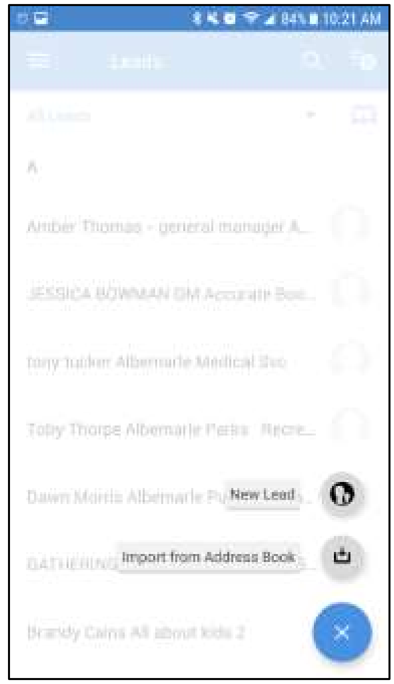




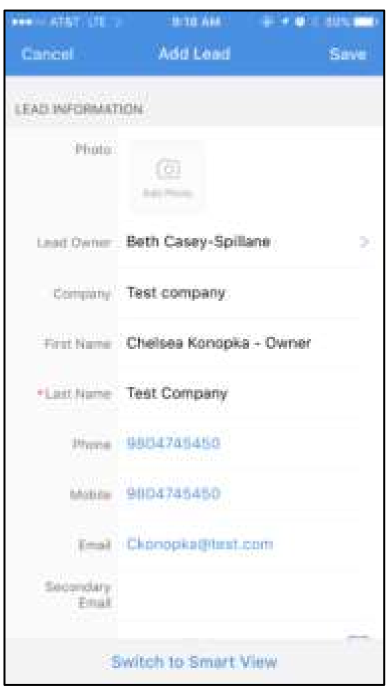


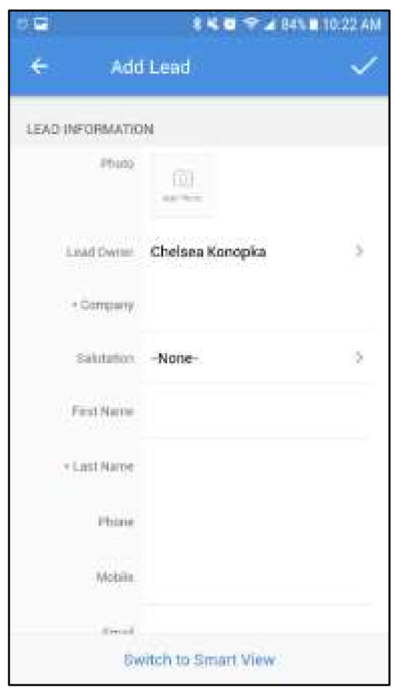
To add a lead, click on the Plus Sign. This is located at the top right of your iPhone screen and the bottom right on your Android Screen. Click Add Lead / New Lead depending on your device. We do not recommend importing Leads from your Address Book.



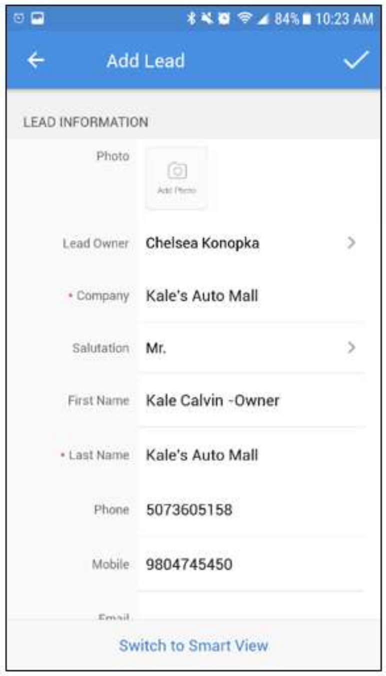


Enter all the information from the lead as shown below.

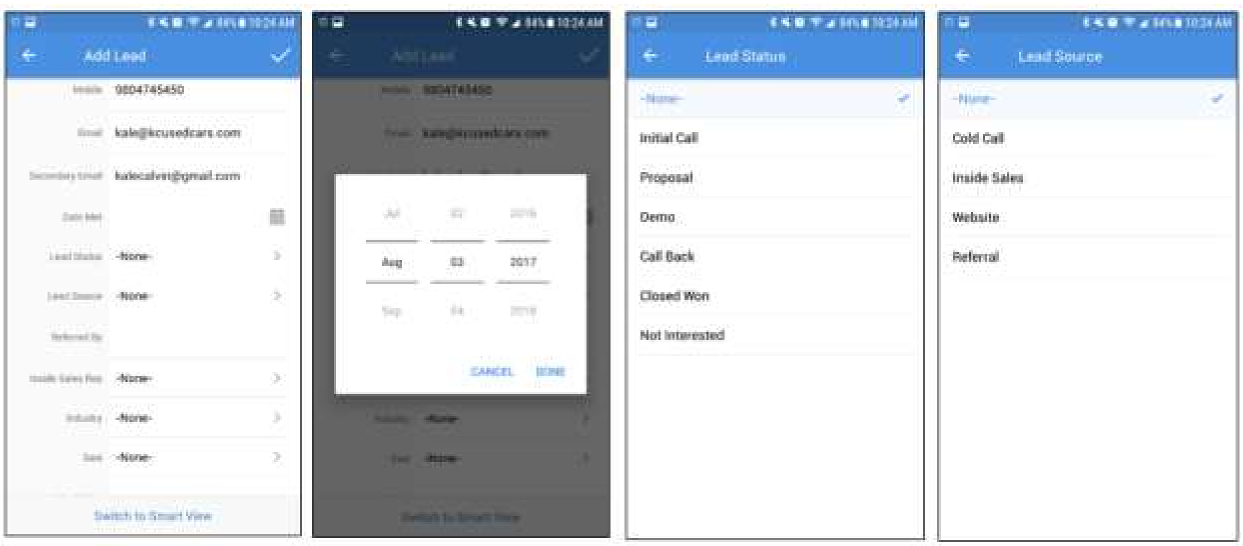




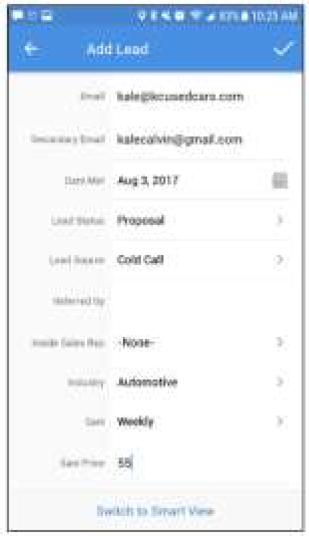
Put the full name and title of the person in the first name box and put the company name in both the company box and the last name box. Enter any applicable phone numbers. (Note: You will be able to make and log calls through your app).

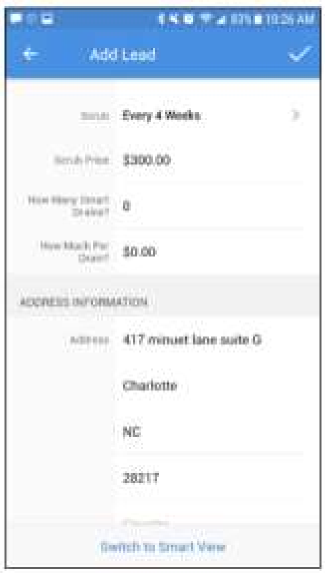
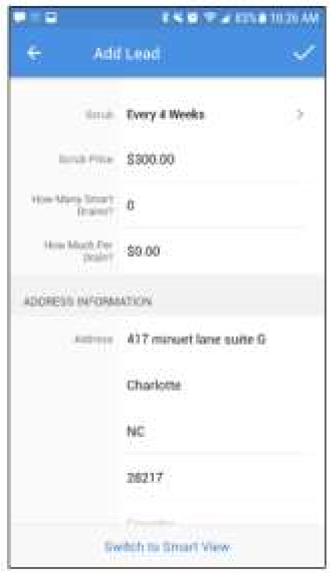


Enter any applicable email addresses, the Date Met, Lead Status, Lead Source, and Pricing as shown below. (Note: you can send emails directly through your app and we do have the ability to send email campaigns, so always put in the email if you have it)



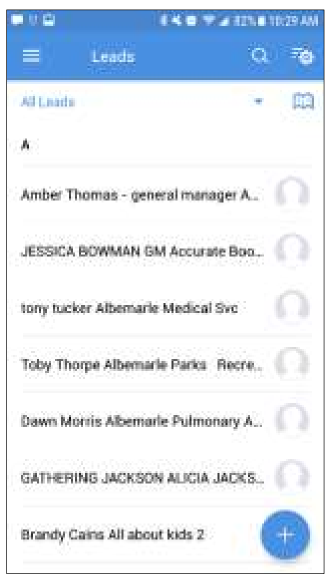

Industry
-None-
Restaurant
C-Store/Gas Station
Retail
Industrial
Daycare/Education
Healthcare
Automotive
Grocery/Supermarket
Fitness/Gym
Other

Sani
-None-
Weekly
Biweekly
Monthly
Other

Add Lead
kale@kcusedcars.com
kalecalvin@gmail.com
Aug 3, 2017
Proposal
Cold Call
-None-
Automotive
Weekly
55
Switch to Smart View

Scrub
Every 4 Weeks
-None-
Weekly
Biweekly
Monthly
Every Other Month
Quarterly
Biannually
Annually
Other

Add Lead
Every 4 Weeks
$300.00
0
$0.00
ADDRESS INFORMATION
417 minuet lane suite G
Charlotte
NC
28217
Switch to Smart View

Add Lead
Every 4 Weeks
$300.00
0
$0.00
ADDRESS INFORMATION
417 minuet lane suite G
Charlotte
NC
28217
Switch to Smart View

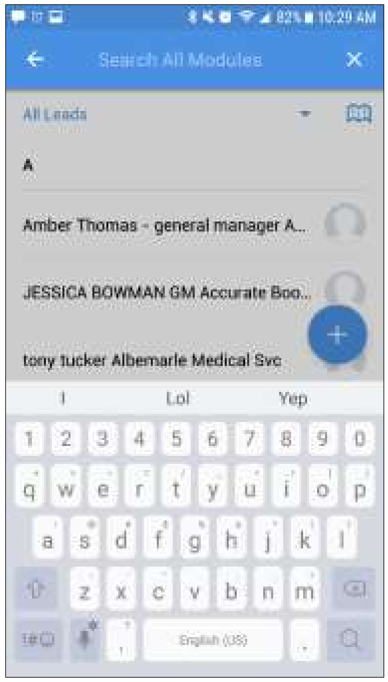
Enter the address as shown below. If there is a Suite number, you would enter that in the first line. Enter notes as shown below. You always want to date-stamp your notes, enter a detailed picture of the conversation, and end with your initials.

Quickly review everything you've entered in your lead and hit the check mark (android) or save button (Iphone) to save. When you hit save, you will be brought back to your leads module. Everything in your leads module is sorted by what you put in the last name box on your lead, which is the company name.

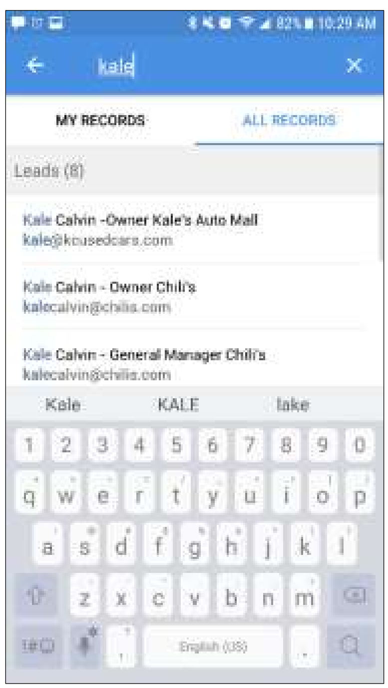


Creating Events for your Leads

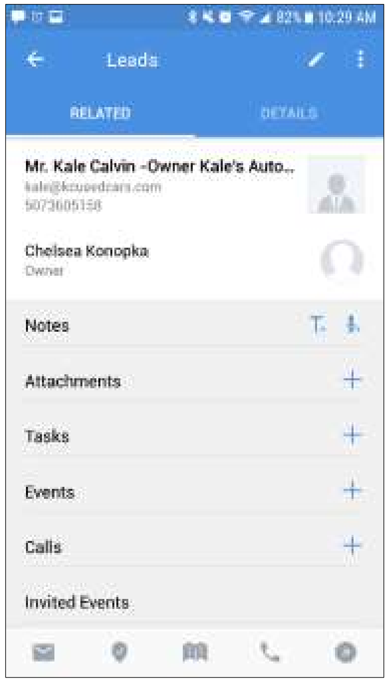
If you see your lead, click on it to open. If not, you will want to search for it using the search function in the top of your application. Click in the Search box.



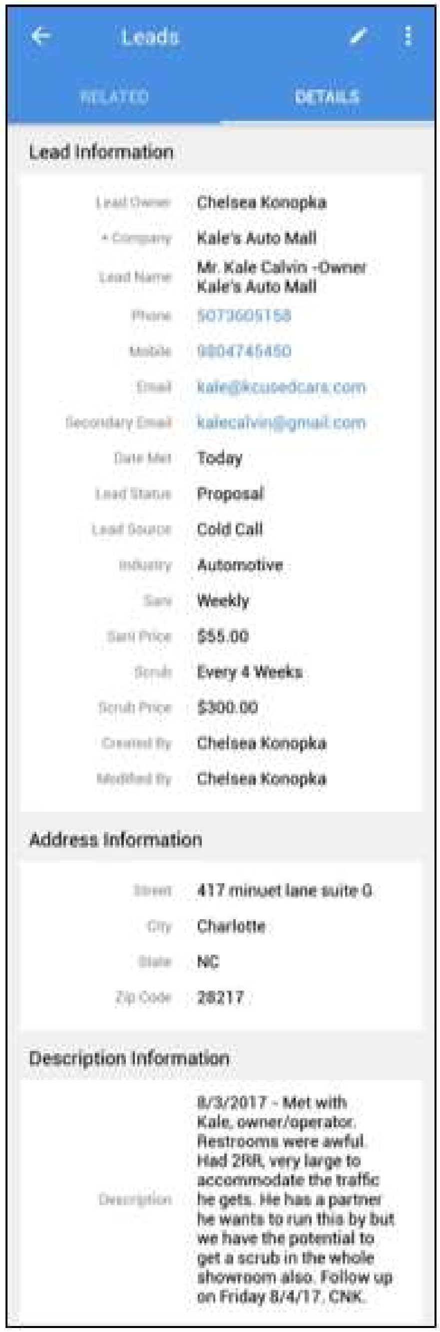
Type a portion of the company name and click the magnifying glass to search. (Note: by default, you can search by the contact name, company name, email, and address. You can change this in your settings).



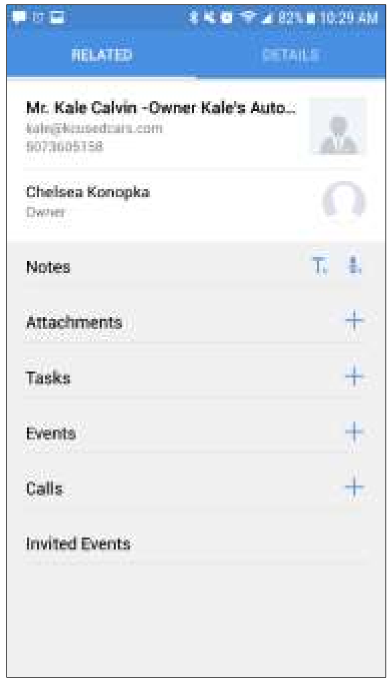
Select the lead that you were looking for. When you open it, it will look like the screen below. In the rest of this guide, we will refer to this as the “Related Module”



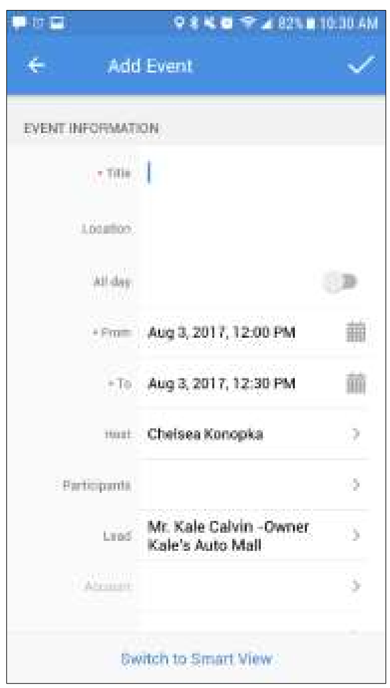
If you need to see all the information you entered, click on the details tab at the top of your screen to get to the screen below. Here, you will be able to see all your Lead Information. This is also where you will update your notes and add your pricing by clicking the pencil in the top right hand corner. (Note: If you would like this to be the first screen you see, you can make that change in the settings).



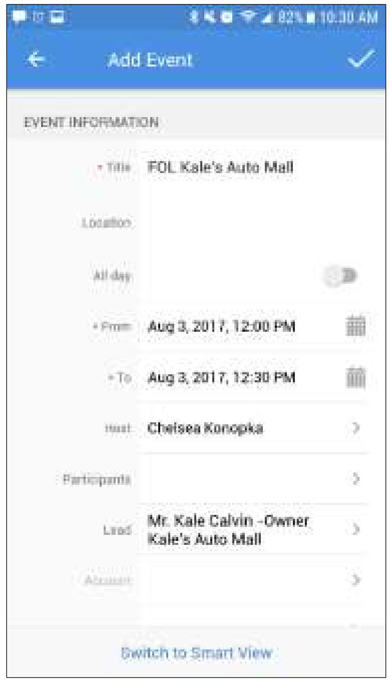
In this case, we need to add an event to follow up with this prospect. We will need to return to our Related Module by clicking on Related near the top of your screen. Here is where you will add Events, log calls, and even take pictures for your leads. In this case, we are adding an event so we will click the + to the right of Events.



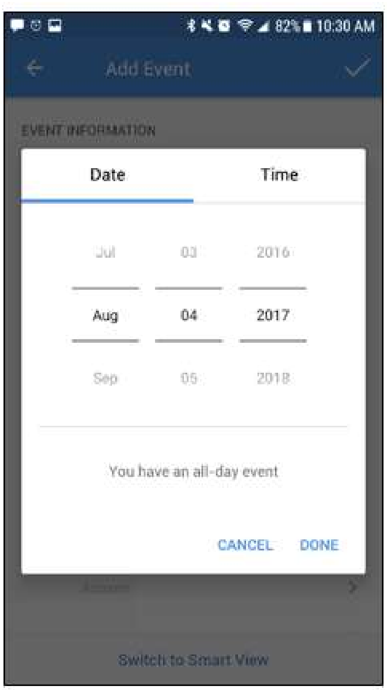
You will now come to the Add Event screen.

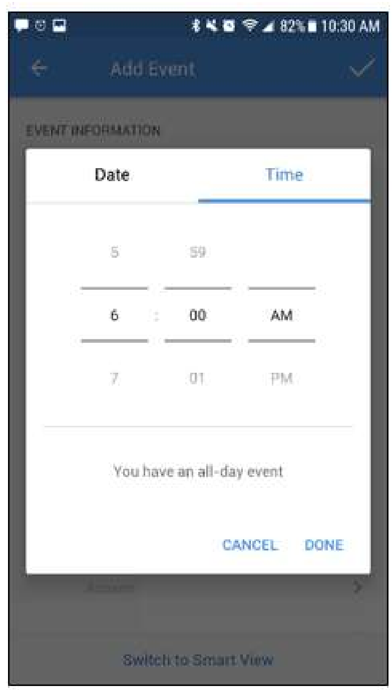


You will notice that your lead is already attached to the event. You will want to update the title so you remember what you need to do on your calendar. We recommend including a disposition (See Disposition Guide on pages) and the business name as shown below.

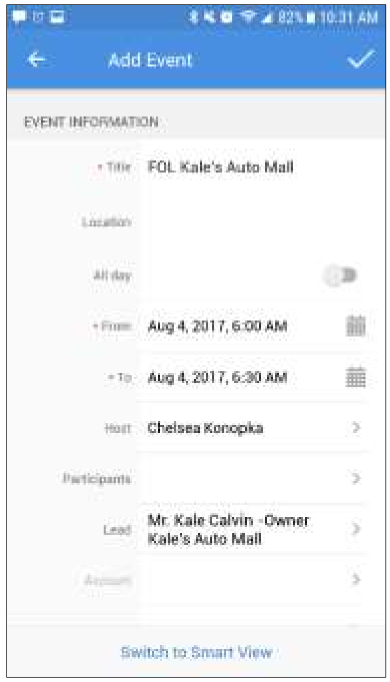


Change the date and time of the event. If you have a firm appointment, block off that time. If you are calling, or just dropping by, we recommend putting the event at 6 a.m. so you are reminded of all the prospects you need to connect with that day. Click Done.

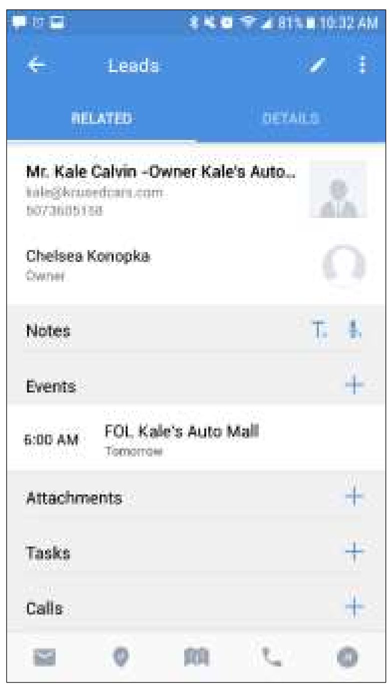




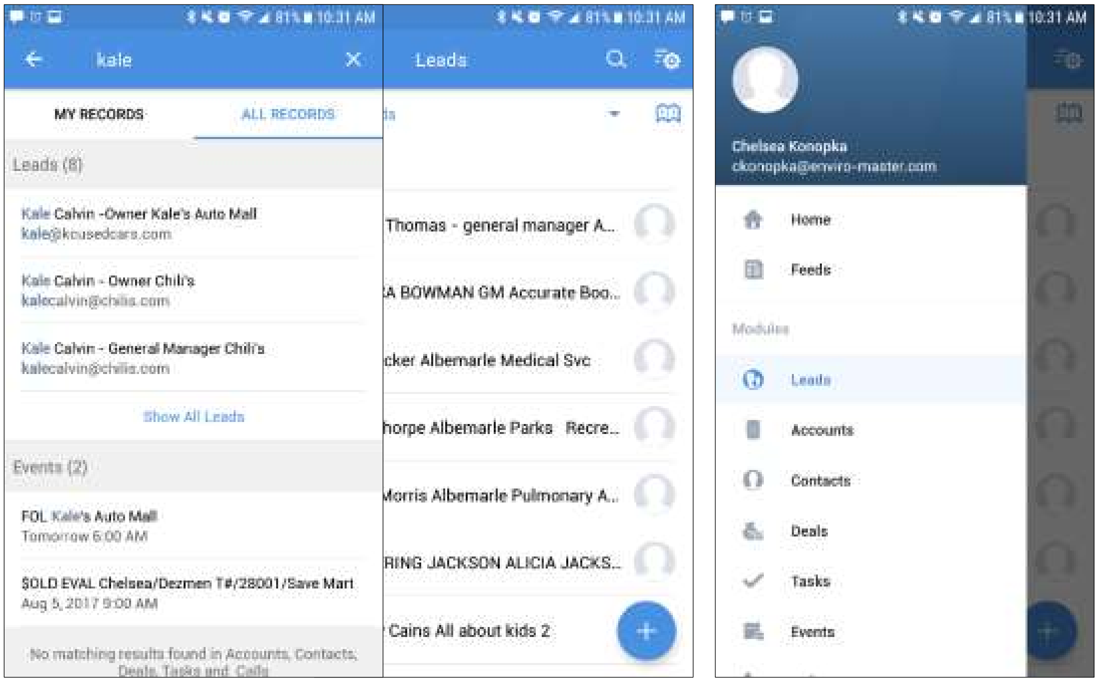
Check your event and click the check mark (android) or Save (iPhone) to save.



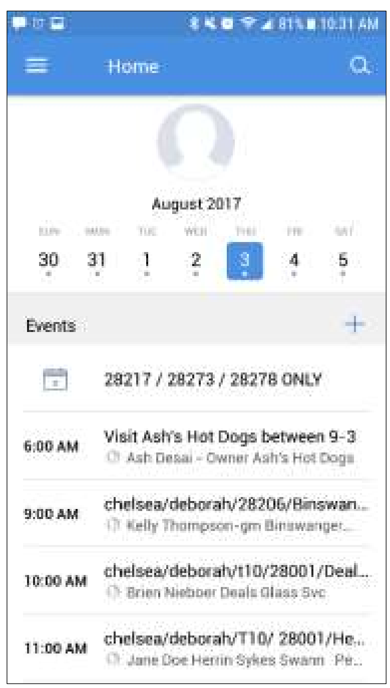
In your related module, you will now see an event for your lead.



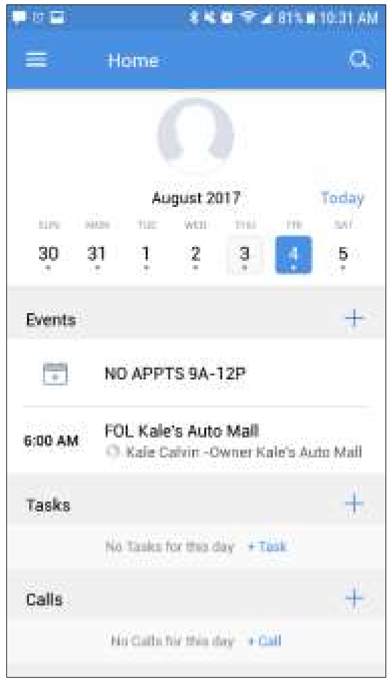
If you want to see this on your calendar, back out through these screens to go back home.



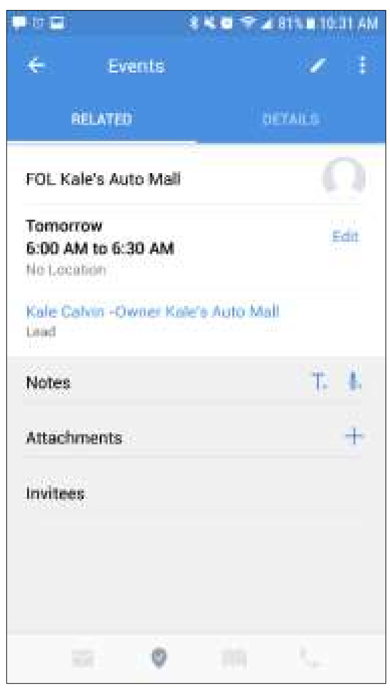
Click the Menu (3 horizontal lines in the top left) and click home. On the iPhone, simply click the Home button.



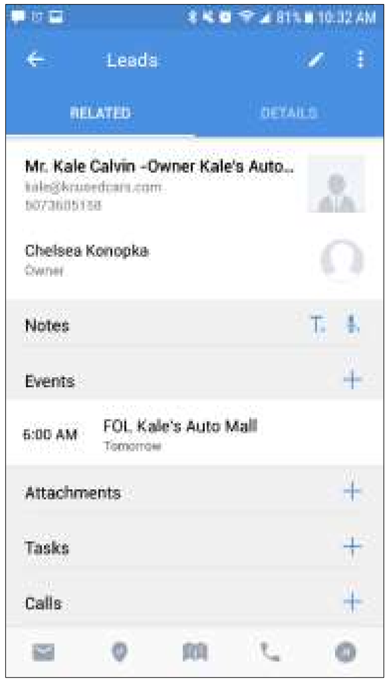
Click on the date that you scheduled your event for if you'd like to see it on your home screen. This is what your screen will look like the day of that event. Click on the event to view the details.



Click on the blue link to get to your lead.

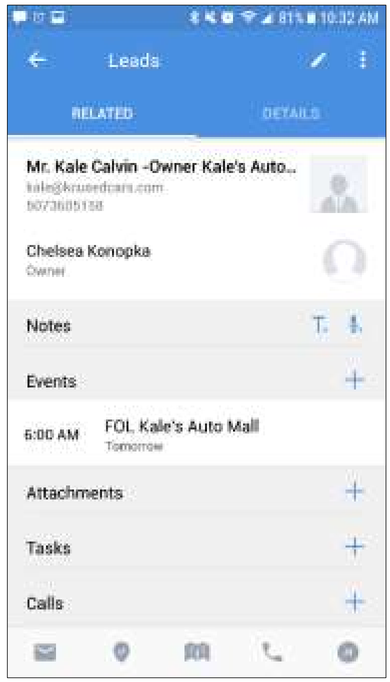


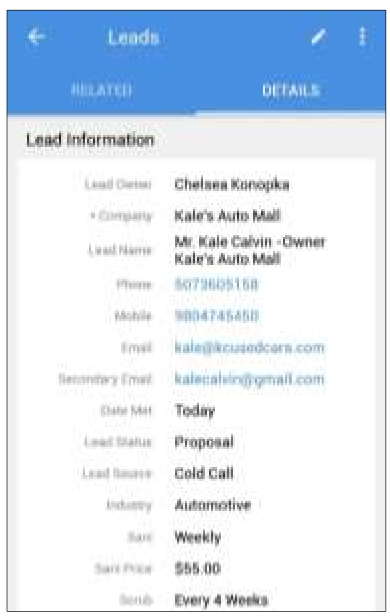
This will bring you to the related module of your lead. If you'd like to see the details, click the Details tab. To disposition your appointment, follow the steps in the remainder of the dispositioning guide on the next few pages.



The Ultimate Guide to Dispositioning Leads & Appointments

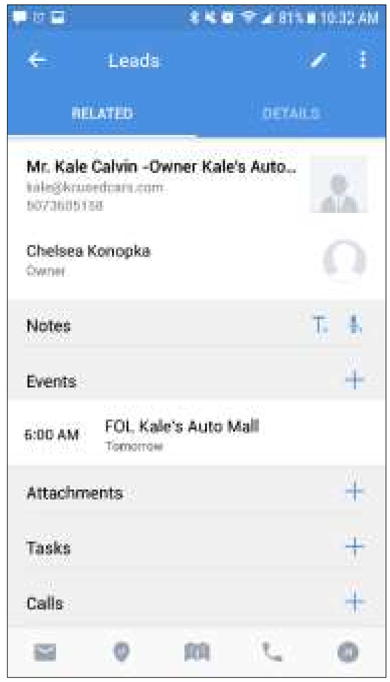
Click on an Event you would like to edit and click the link to the lead. You will come to this screen.





Be sure to update all your event information in the details module (below) by clicking details on the lead, and the pencil to edit any fields you need to update. Be sure to add notes in the description box on the lead, and not in the notes box in the related module.

Return to your related module and click on the event. If the event was in the past, it will show "1 completed." You can still click on that to get to your event. Click the pencil to edit the event. The Subject line should say "Rep/ISR T#/Zip/Business" (ex. Joel/Patrick T50/28278/SkyZone). Click on the Subject and type in the appropriate disposition before the "Rep/ISR T#" to distinguish how the appointment went (ex. $old Joel/Patrick T50/28278/SkyZone).



a. **$old** Type this abbreviation once you've <u>**$old**</u> the appointment then move the appointment to the following Saturday (See step 4 below).

b. **PP** Type this abbreviation if you sent a <u>**Proposal**</u>, then move the appointment to the day you will be following up

c. **FOL** Type this abbreviation if you need to <u>**Follow Up**</u> with the decision maker then move the appointment to the day you will be following up.

d. **NS** Type this abbreviation if the decision maker was a <u>**No Show**</u> then move it to Sunday of that week so that we can call back to find out why they didn't show also possibly reschedule.

e. **NI** Type this abbreviation if the decision maker was <u>**Not Interested**</u>. Please move this to a Sunday 6 months to 1 year down the road so we can try again.

f. **RS** Type this abbreviation if the appointment needs to be <u>**Rescheduled**</u> and also move it to Sunday on the calendar of that week.

g. **RSL** Type this abbreviation if you met with an influencer who has provided you with the name and number of the final decision maker with whom you would like us to <u>**Rescheduled**</u> an appt with. remember to move it to Sunday on the calendar of that week.

h. **CORP** Type this abbreviation if you meet with an influencer who has provided you with the name and number of the final decision maker who is over 20+ locations to indicate that **<u>Corporate Accounts</u>** assistance might be needed. Contact Inside Sales leadership once this has been done.

i. **EVAL** Type this abbreviation when offering an **<u>evaluation period</u>** for a 30 day period, move the appointment to the date when you will be going back to get signed paperwork. Disposition the appointment $old and move it to the Saturday of that week.

j. **SCH** Type this abbreviation if you have a lead that you would like the Inside Sales team to **<u>Schedule</u>**. (Also see the "Assigning Prospects to your Inside Sales Team" section)

k. **DUP** Type this abbreviation if you have **<u>already visited</u>** the customer and entered them into Zoho as a lead also move it to Sunday on the calendar of that week for coaching opportunities

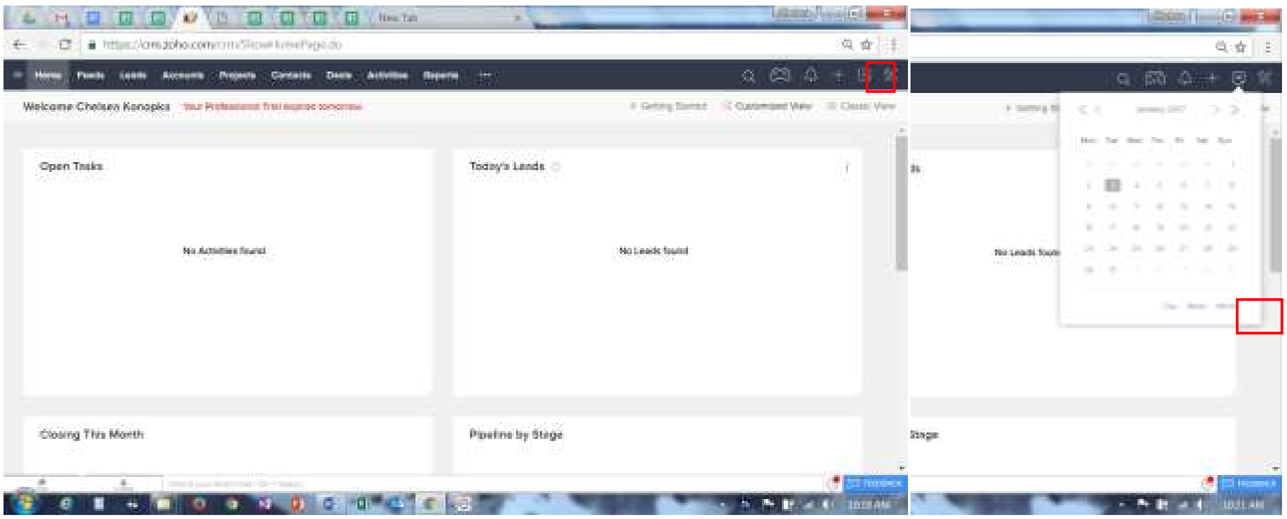
l. **EXIST** Type this abbreviation if an appointment has been booked with an **<u>existing customer</u>** and move it to the Sunday of that week. Contact us to review the call.

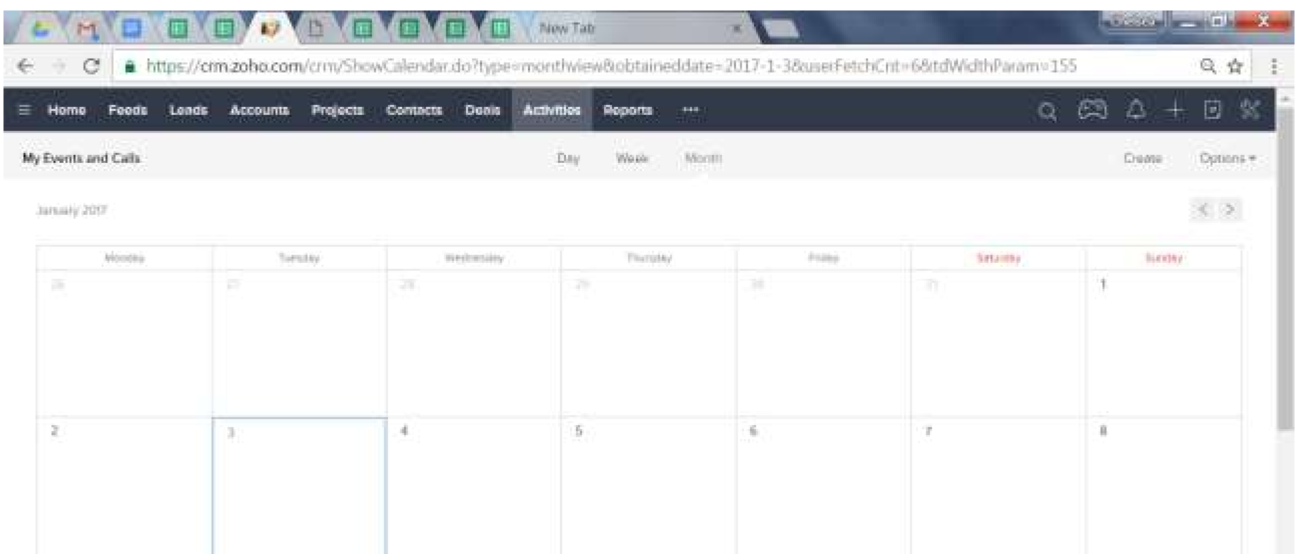
m. **QCR** This abbreviation will appear when an appointment did not pass the Quality Control process. The appointment will be moved to Sunday while we work on strengthening it.

Zoho CRM for Laptop/Desktop

From your Laptop/Desktop, you can access Zoho CRM and the data in the CRM which will be stored in a local database on your phone. This ensures that you can access the important data when not connected to Wi-Fi. The following image is the home screen for Zoho CRM for Laptop/Desktop.

From this screen, click the Events Calendar icon and select the “Month” option on the top right of the screen to view your schedule:

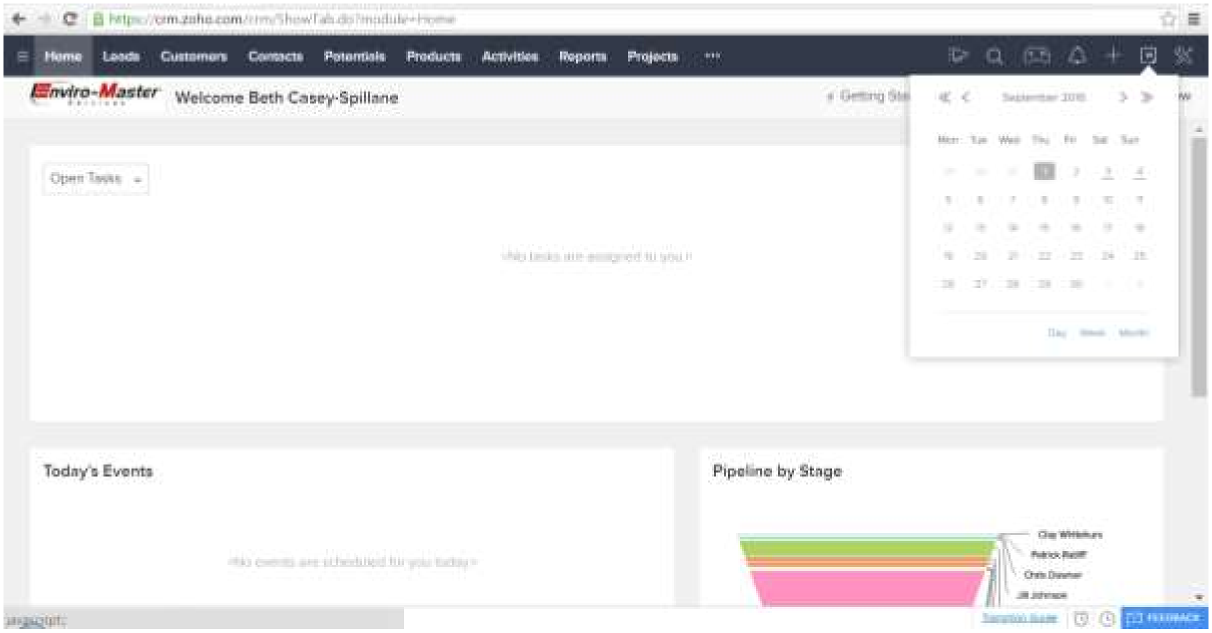




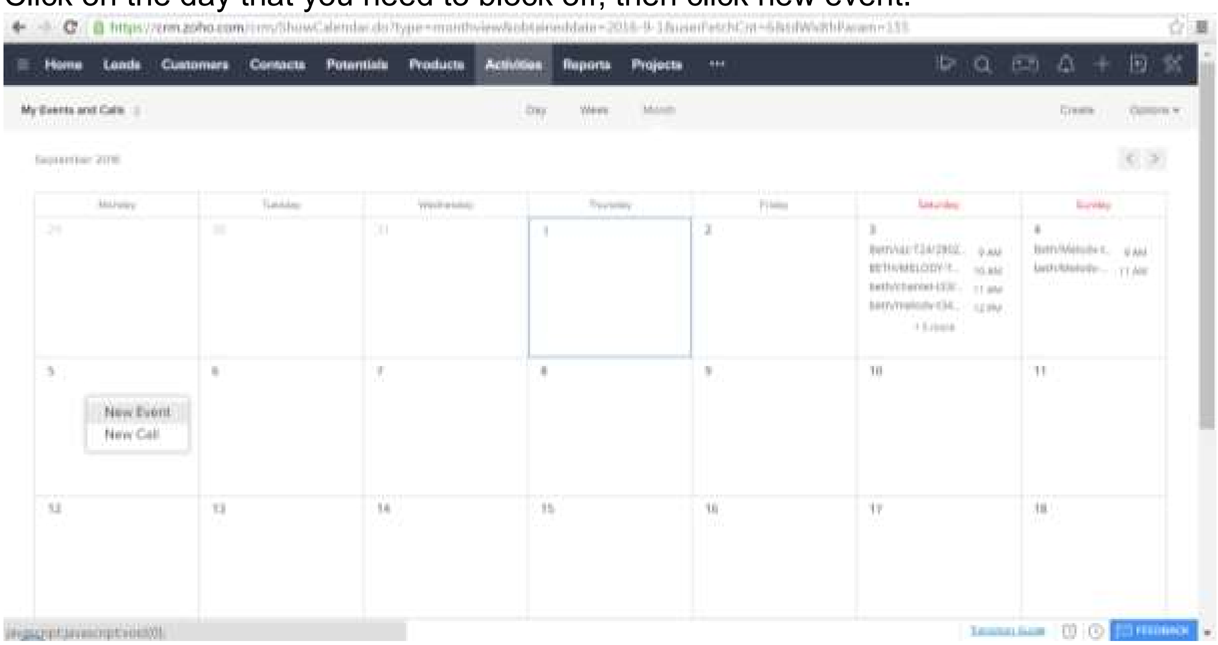
Scheduling your Availability in Zoho

To operate most efficiently, it is imperative that we limit the number of rescheduled appointments. This is easiest done by marking off the times that you or your sales representative will not be available to run appointments on the Zoho calendar.

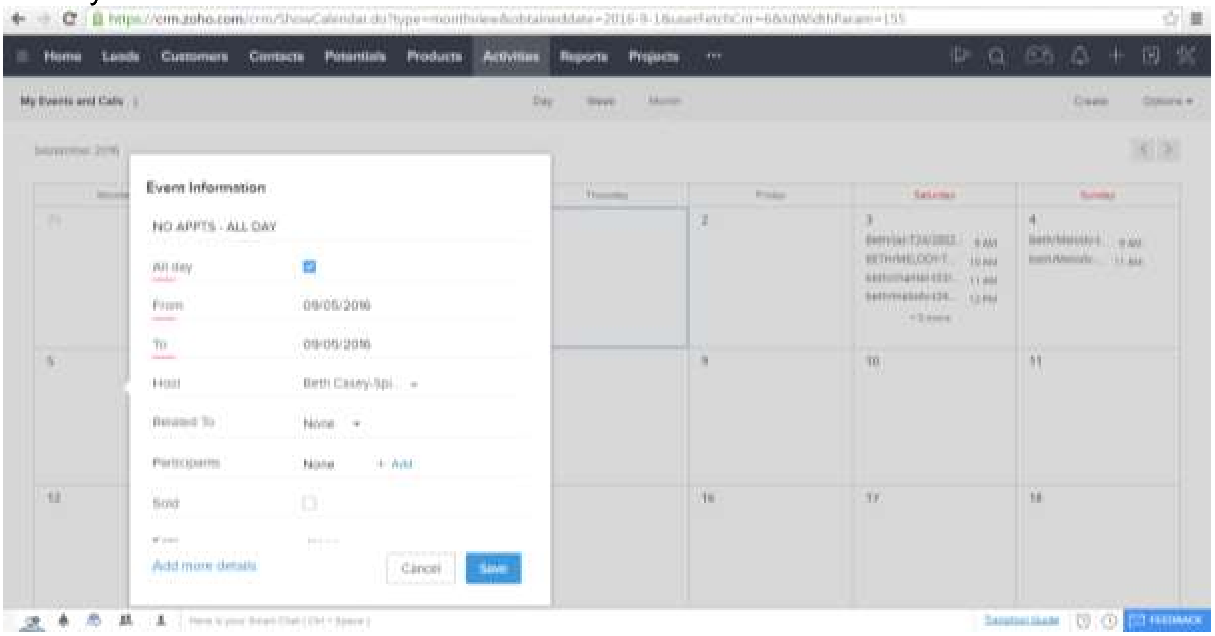
From the Zoho Home screen, click the calendar icon, then click on month to open the month view.



Click on the day that you need to block off, then click new event.



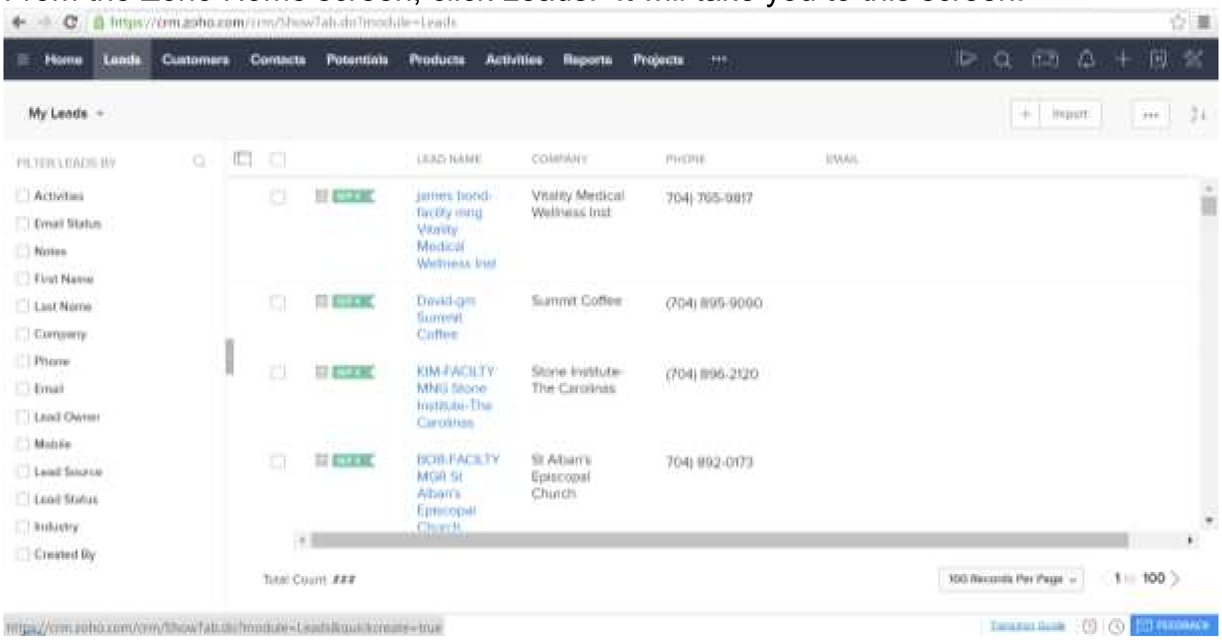
In the subject line, type NO APPTS – ALL DAY (or the time range that you will not be running appointments; for example: NO APPTS 9-12). Click the check box to create an All Day Event. Click Save.



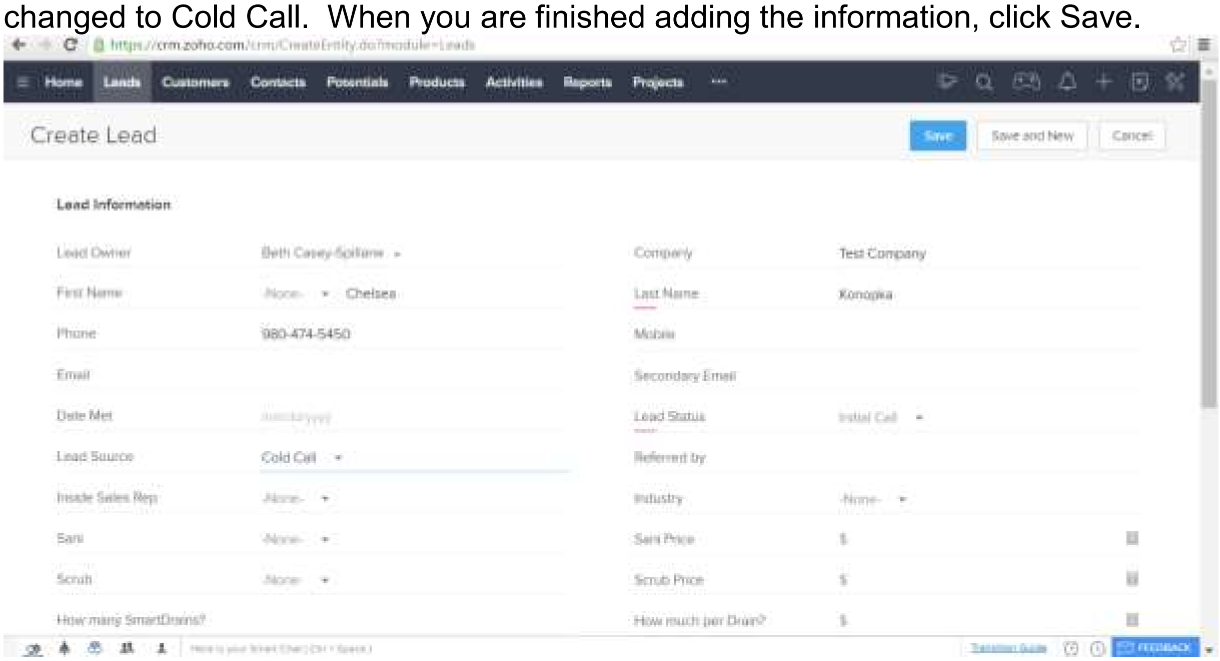
Creating Cold Call Leads in Zoho (Web Version

To operate most efficiently, all cold call leads should be entered into Zoho. This will allow you and your business coach to track your productivity and help you be as profitable as possible. If you are using Inside Sales, it will also insure that the Inside Sales Team does not set appointment with places that you are currently working.

From the Zoho Home screen, click Leads. It will take you to this screen.

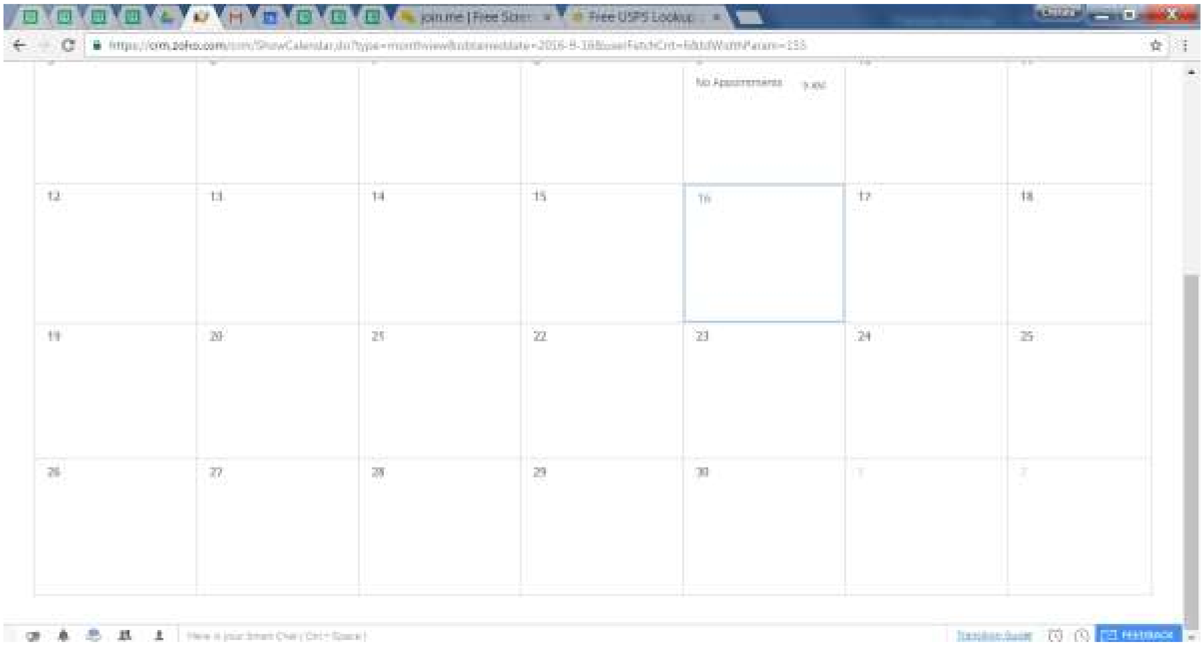


Click the + sign in the top right corner and add all related fields. Lead Source should be changed to Cold Call. When you are finished adding the information, click Save.



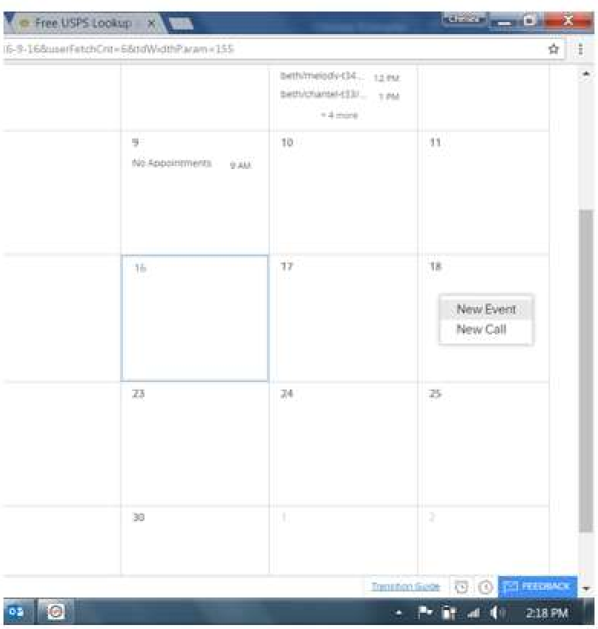
Assigning Prospects to Your Inside Sales Team

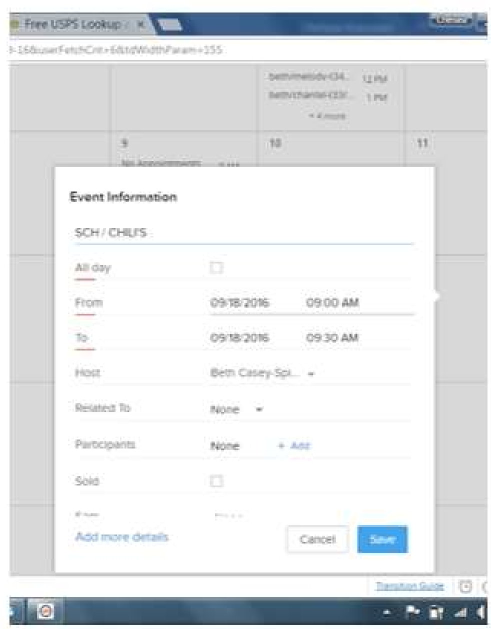
Login to ZOHO and open up your calendar.



Go to the upcoming Sunday and create a new event by clicking anywhere in the box and selecting "New Event."

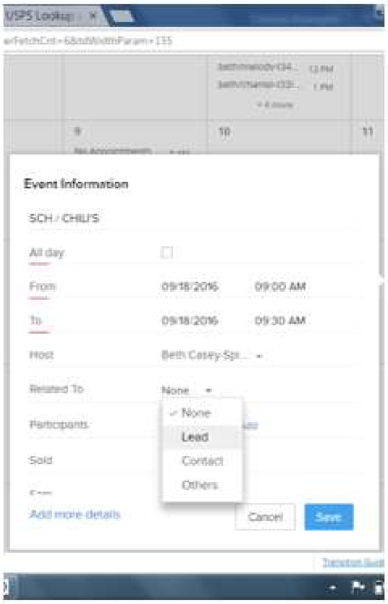
In the subject line, type "SCH" for schedule and the name of the business. For example: SCH / CHILI's

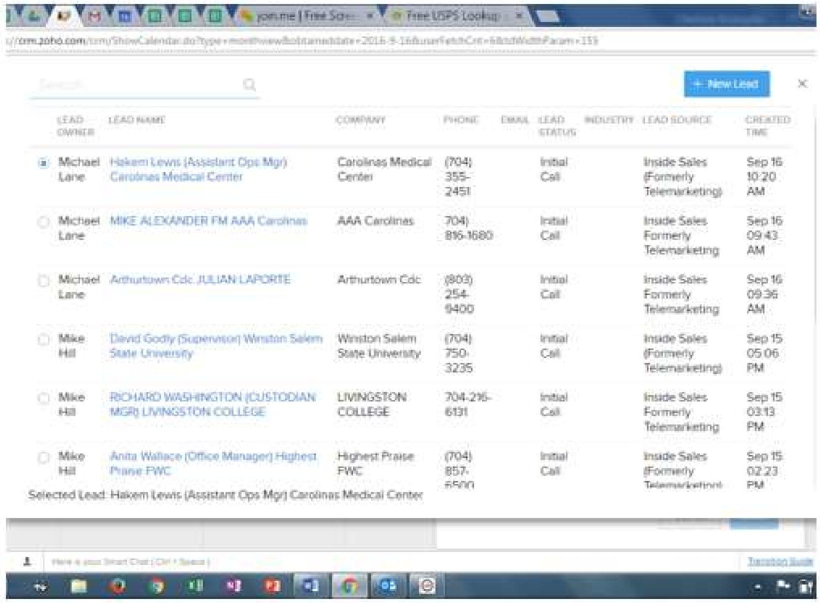




Attach the lead to the event by clicking "Related to" and then selecting lead. Go grab the lead.

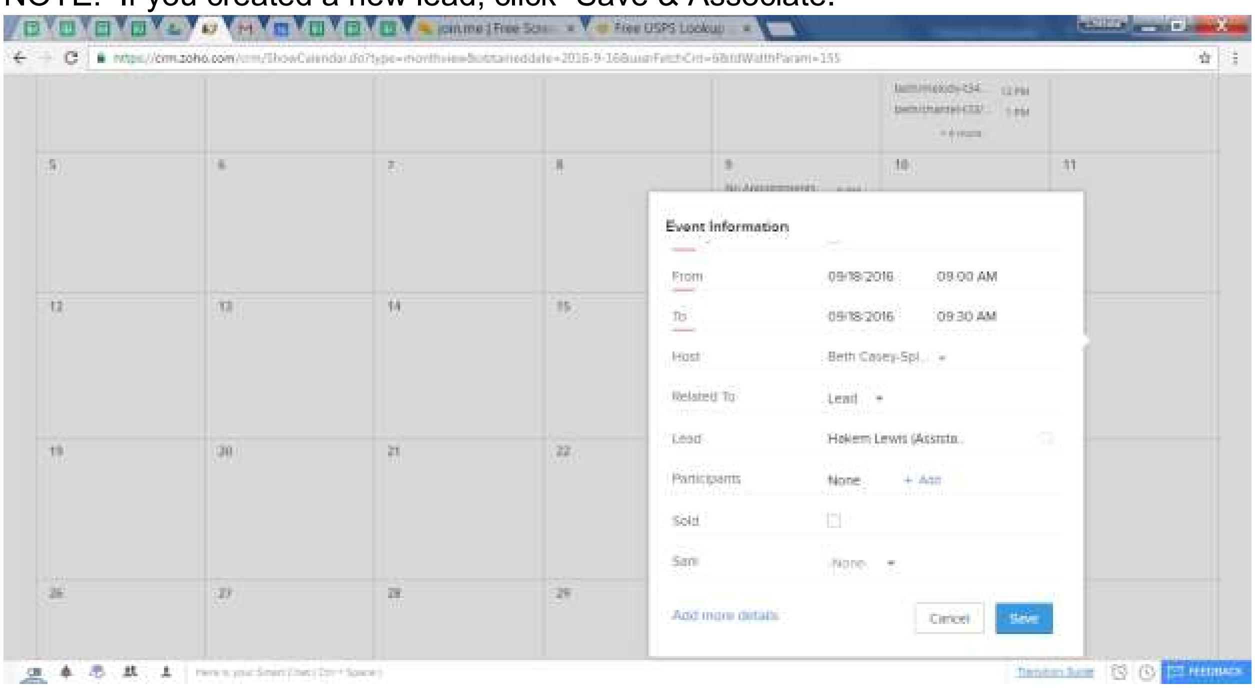
If the lead is already created, simply use the search function by clicking on the magnifying glass. If the lead is not created, you will need to create a new one by clicking "New Lead."





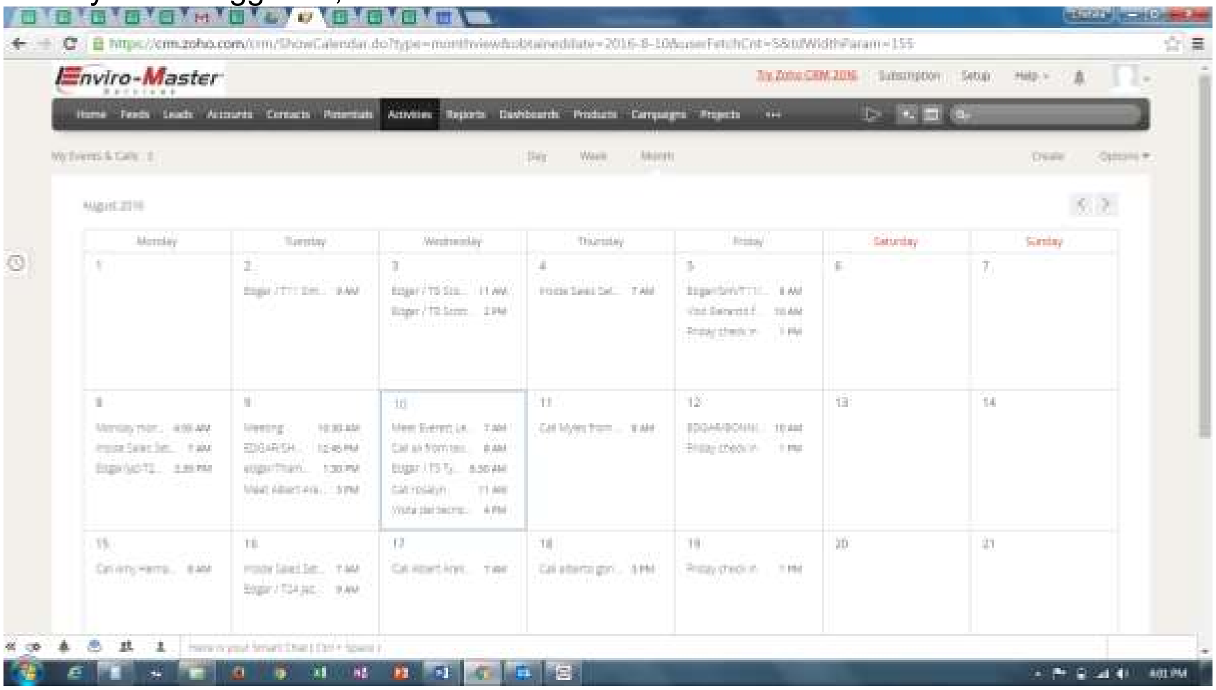
Click Save.

NOTE: If you created a new lead, click "Save & Associate."

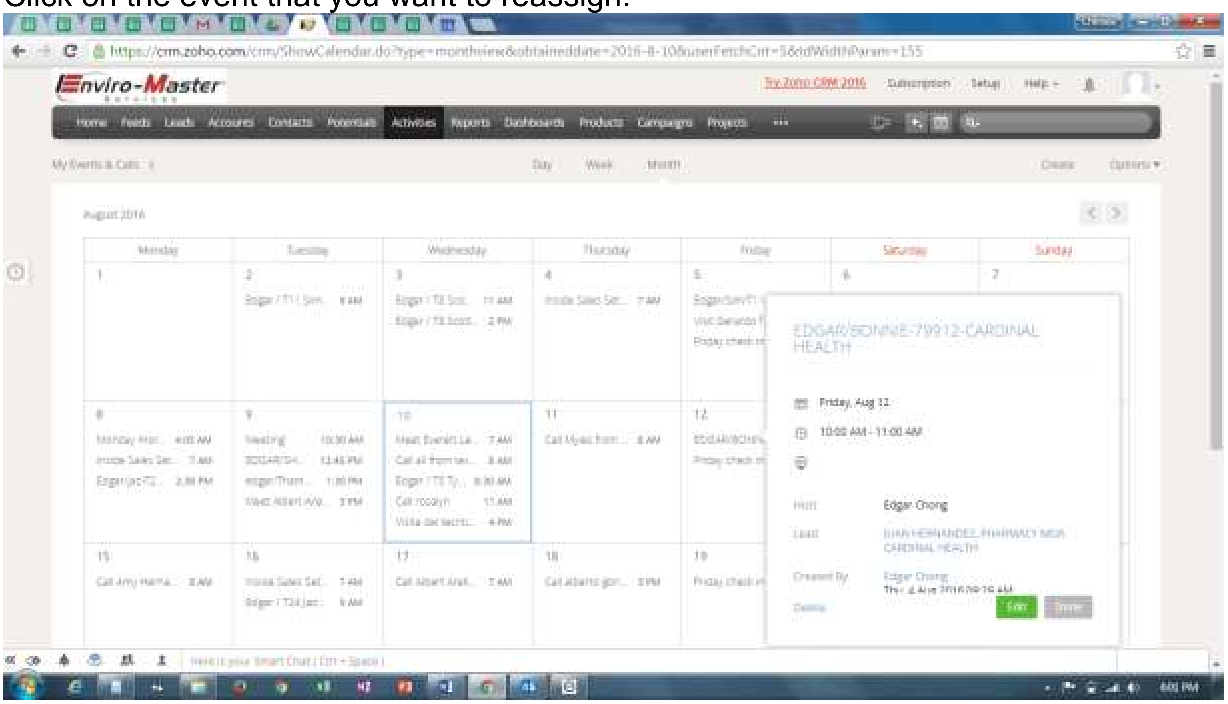


How to Change Lead Ownership

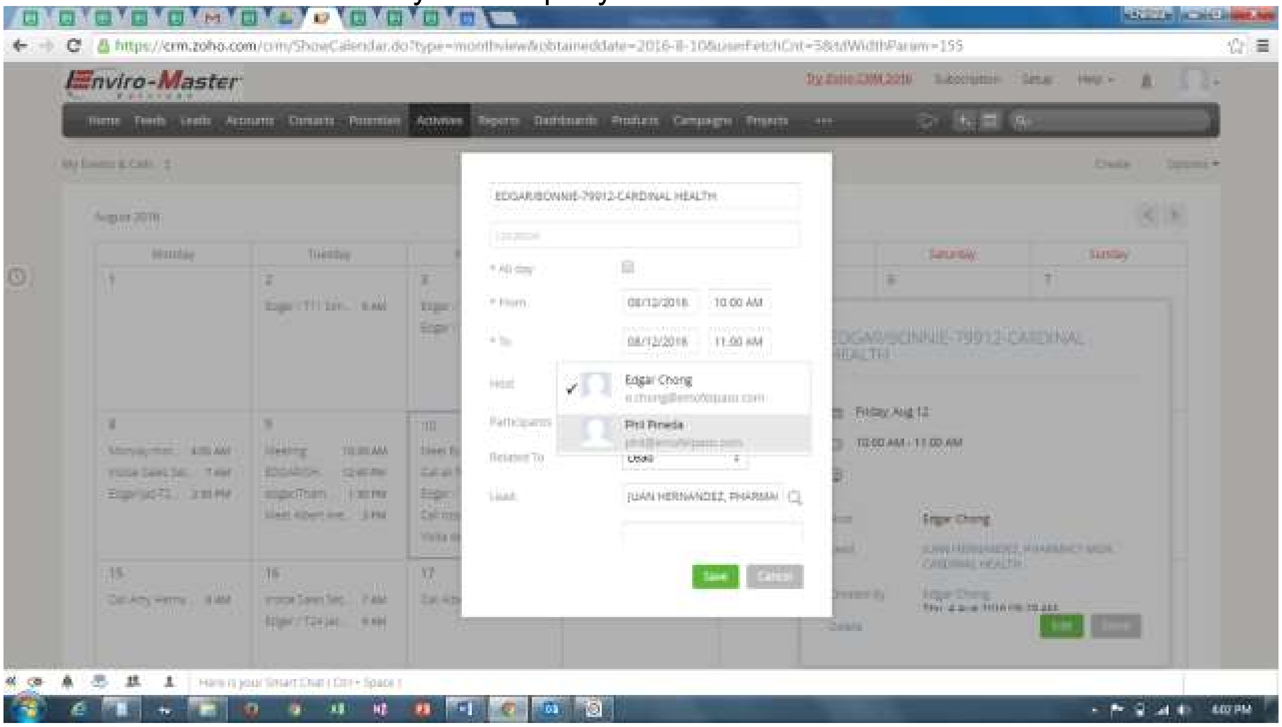
Login to the ZOHO account for the person who currently owns the leads and events. Once you are logged in, click the calendar icon to view the calendar.



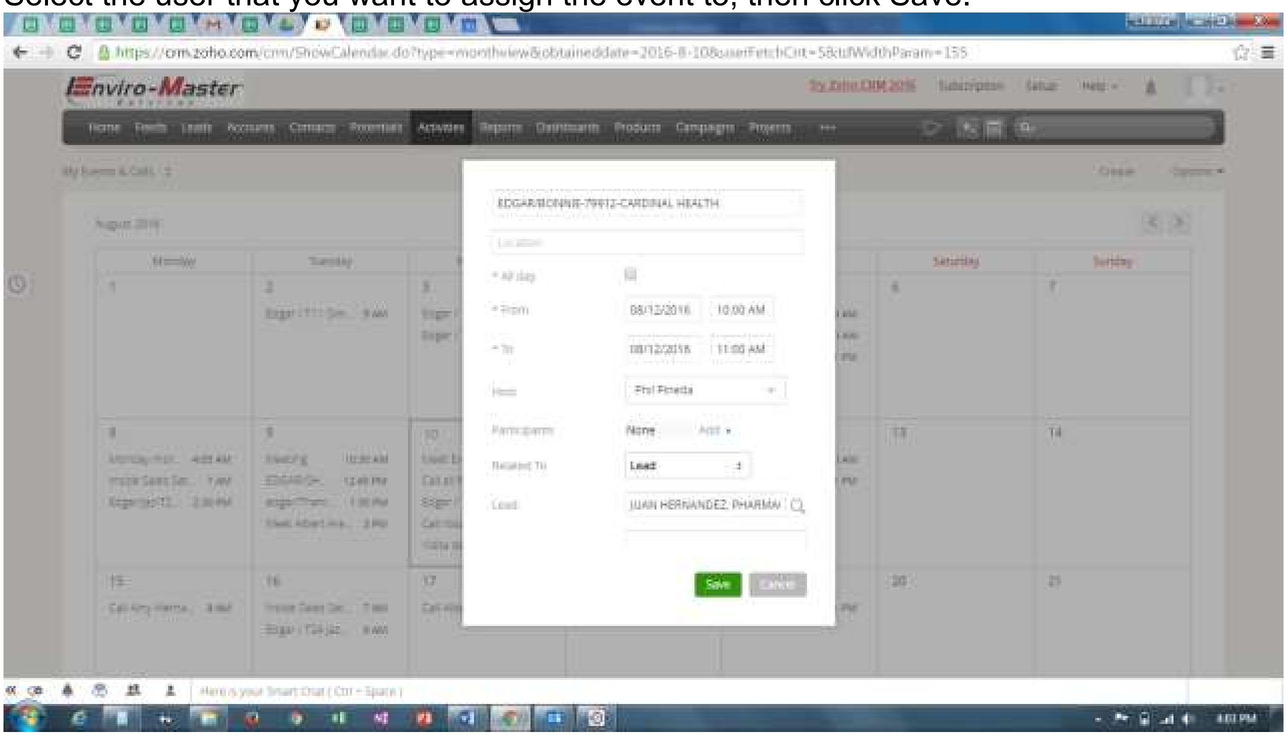
Click on the event that you want to reassign.



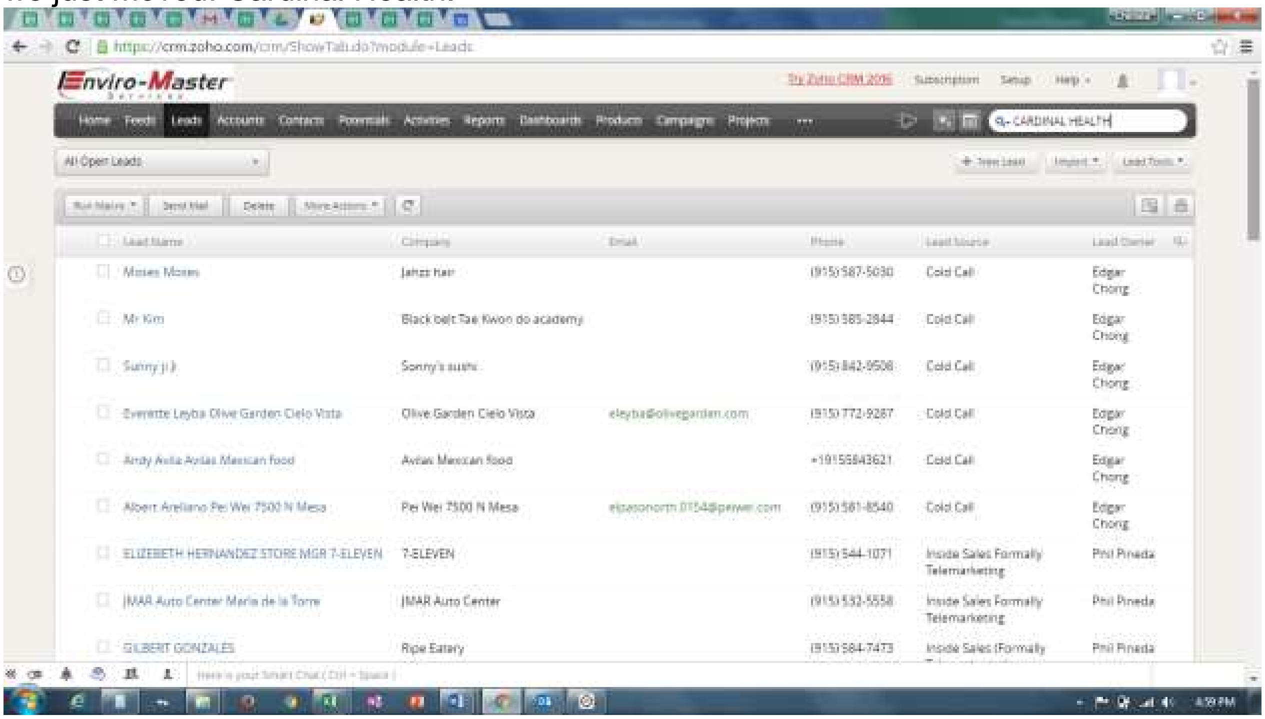
Click Edit to open up the event. Click in the “host” box. A drop-down box will open up with all of the active users in your company’s ZOHO.



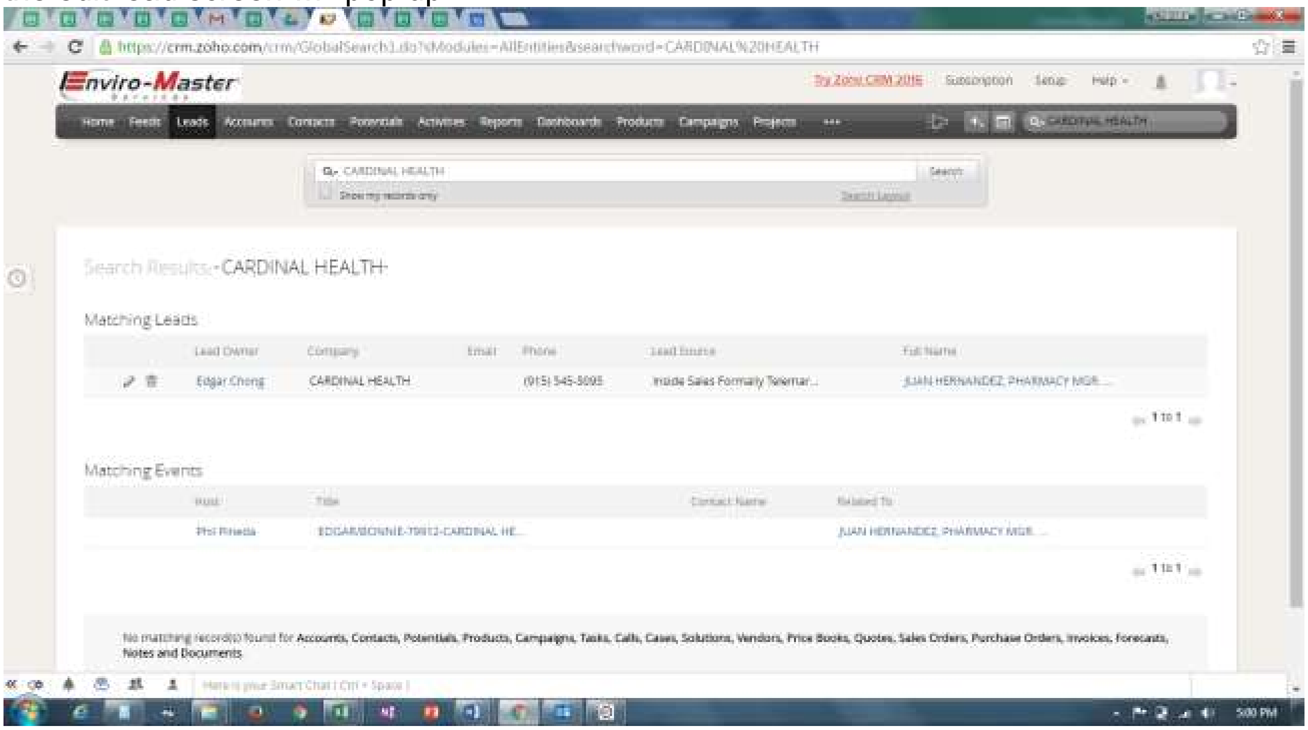
Select the user that you want to assign the event to, then click Save.



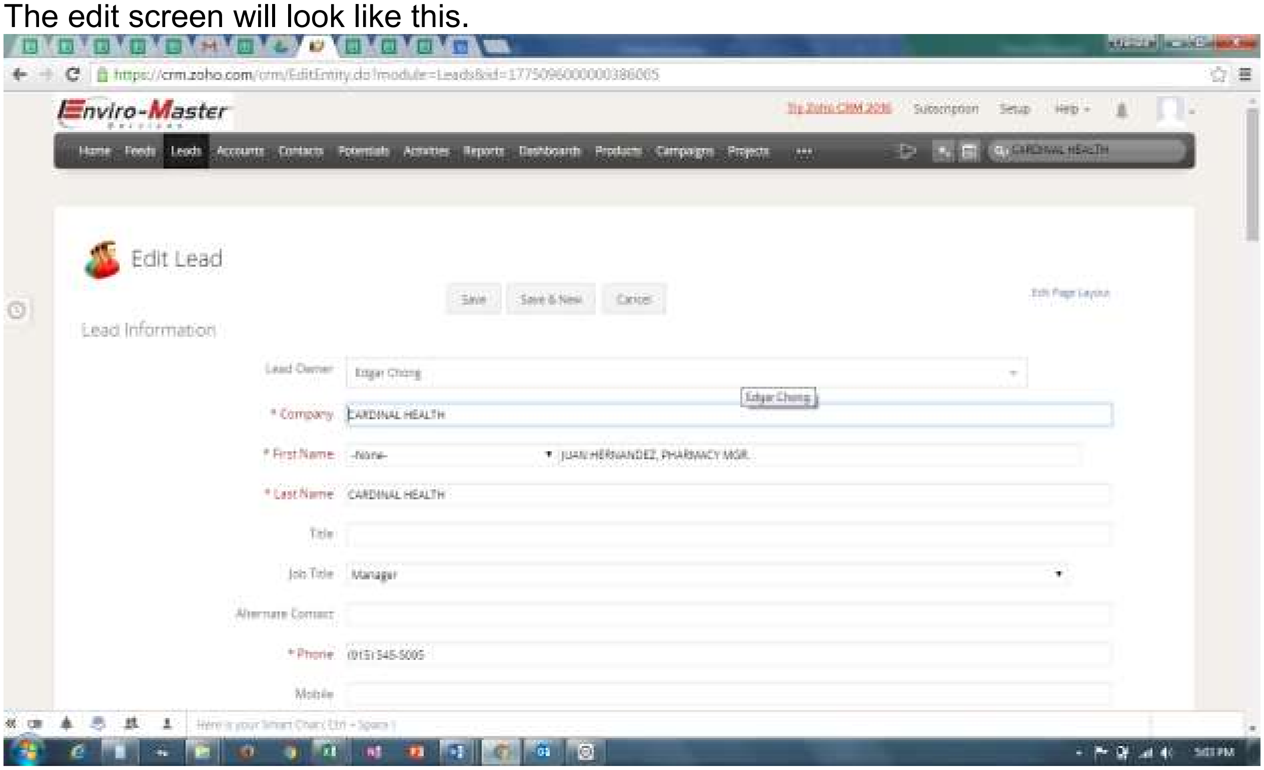
Hit refresh. The event should disappear from your calendar. Now that the event is moved, we also need to move the lead. Click on the Leads Module or search for the account by name. In this case, we searched for the Name of the business who's event we just moved: Cardinal Health.



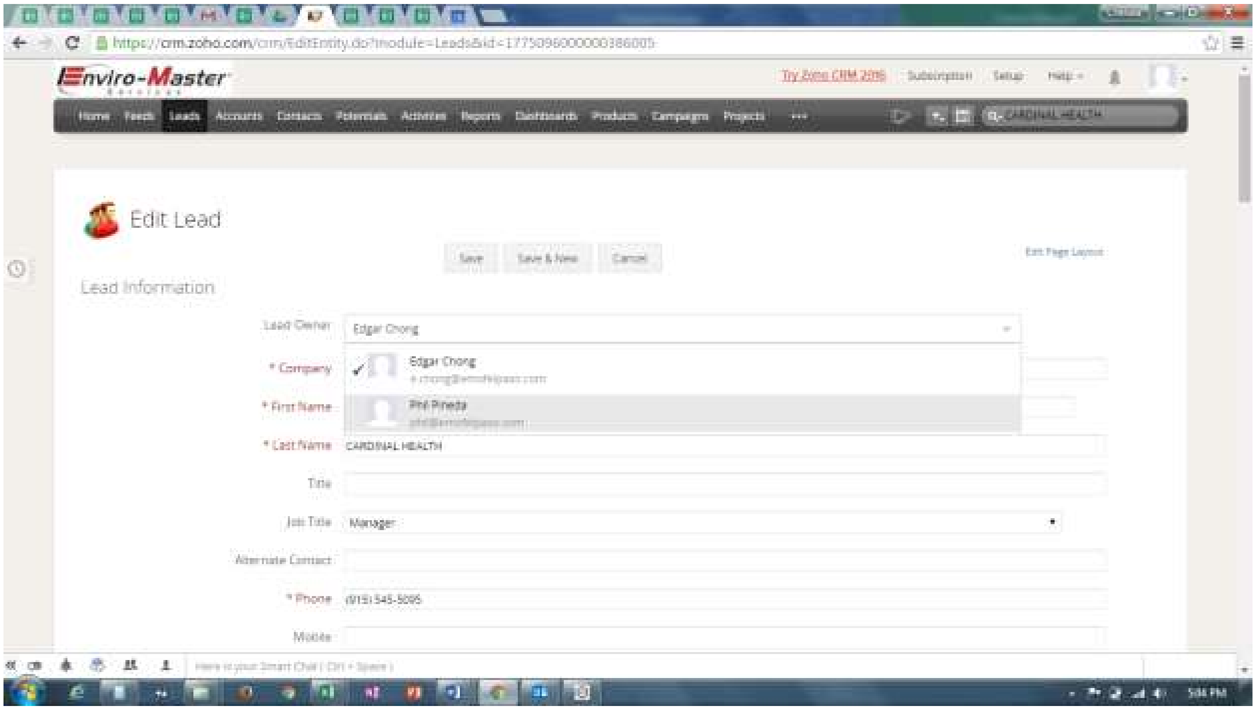
The lead and the old event will pop up. Hover over the lead and you will notice a pencil icon and a trash can icon pop up to the left of the lead name. If you click the pencil icon, the edit lead screen will pop up.



The edit screen will look like this.

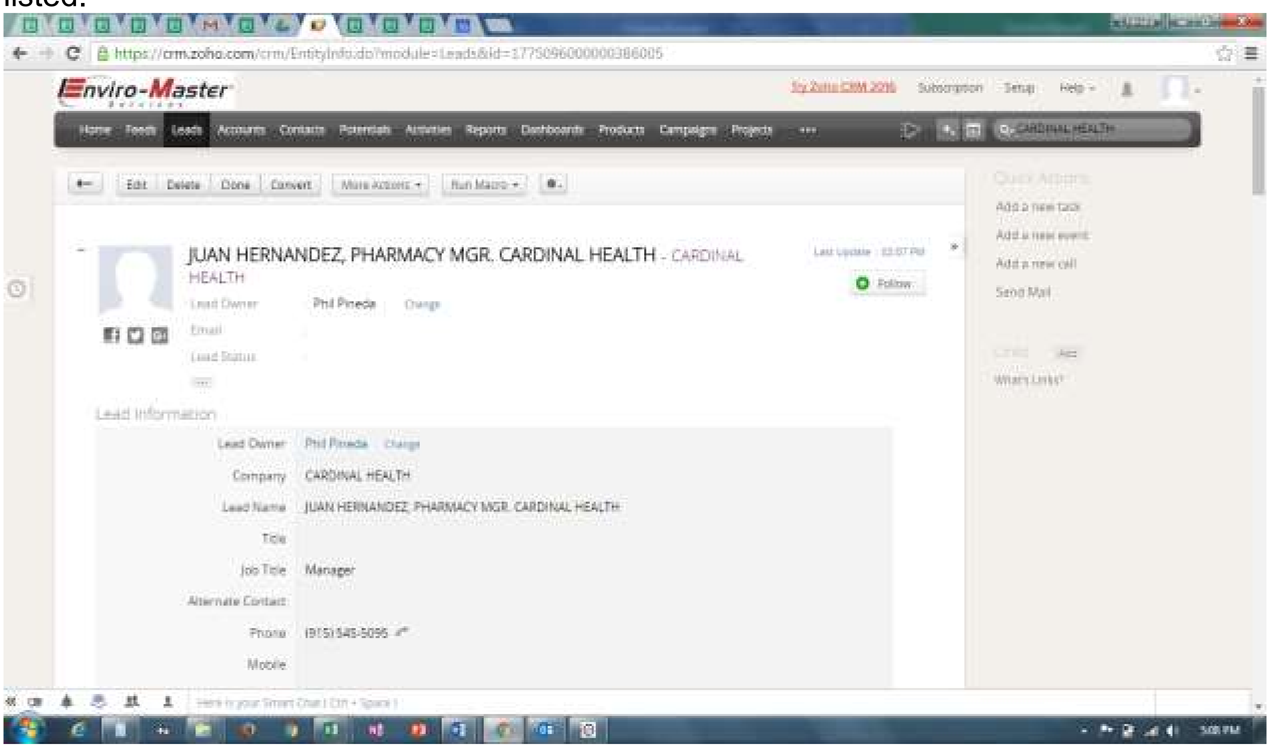


Click in the Lead Owner box and select the same owner that you assigned to host the lead.

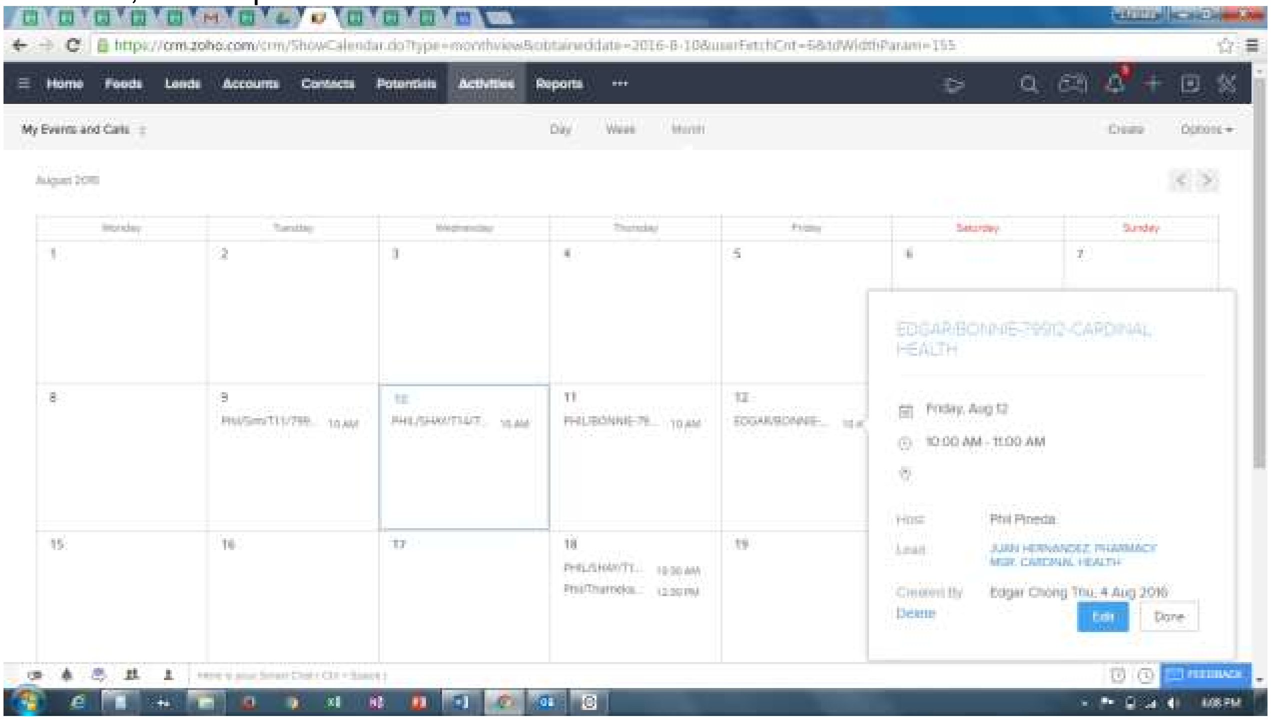


Click Save. The lead will now show the individual that you selected as the new owner and it will also appear in the new owner's ZOHO.

NOTE – the lead and event will still show up in the admin's ZOHO with the new owner listed.



Now logout of your ZOHO and login as the user that you assigned to host the lead. In this case, Phil. Open the calendar. You will now see the event with the lead.



Zoho Setup for New Franchisees

If you are a new franchisee, please email Inside Sales at IS@enviro-master.com with the following information:

Full Name
Enviro-Master Email Address
Phone Number
Franchise
Time Zone

Zoho Setup for New Sales Representatives

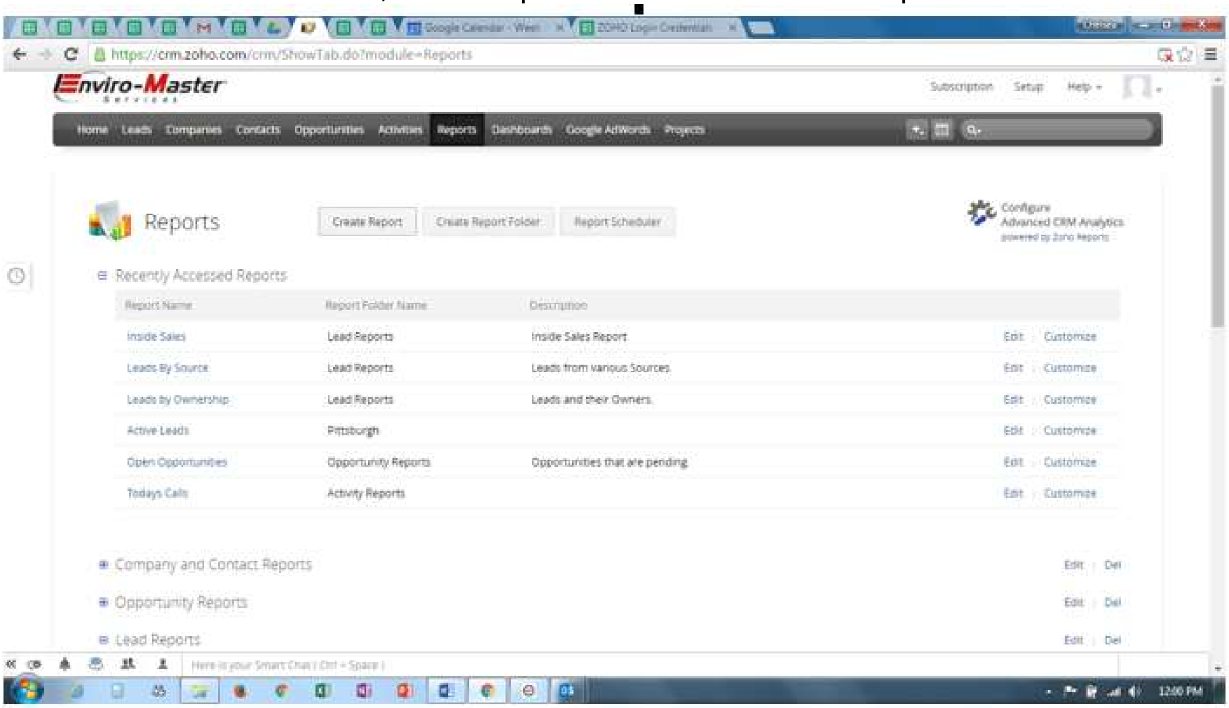
If you have hired a new sales representative, please email Inside Sales at IS@enviro-master.com with the following information:

Full Name
Enviro-Master Email Address
Phone Number
Franchise
Time Zone
Start Date

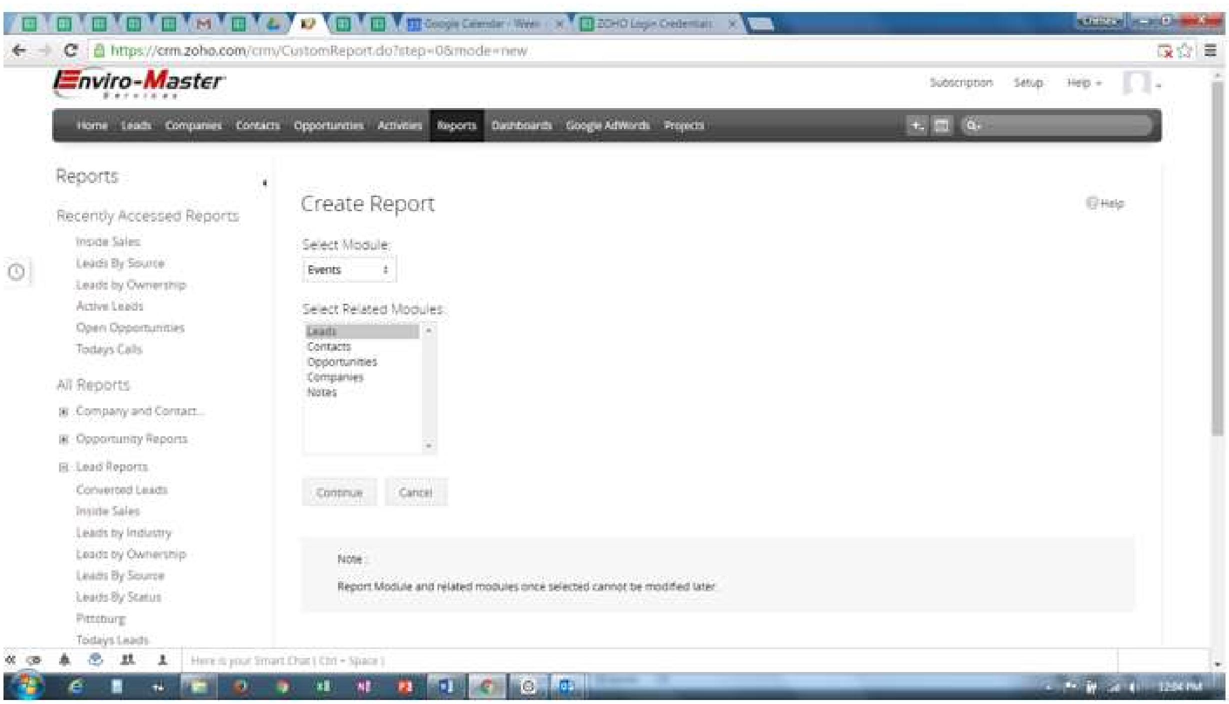
Creating Reports in ZOHO

Below is the basics for creating reports in ZOHO. There are so many different options and they can each be customized to suit your needs.

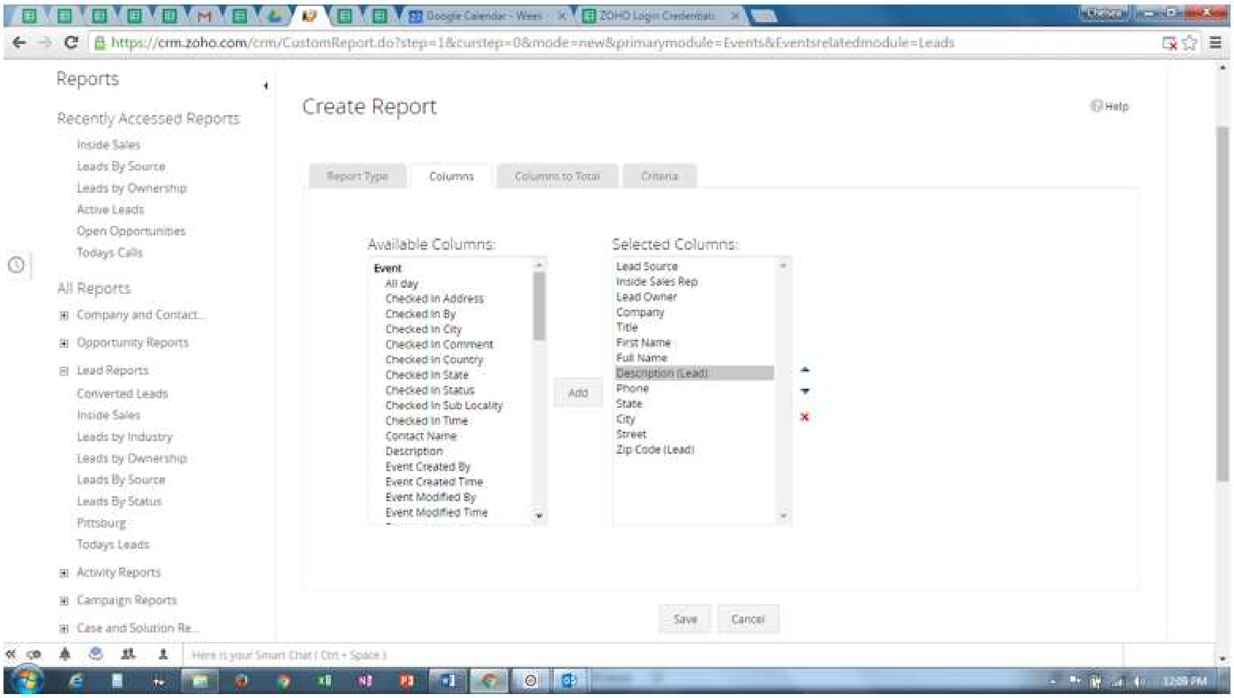
On the ZOHO home screen, click "Reports" and then "Create Report."



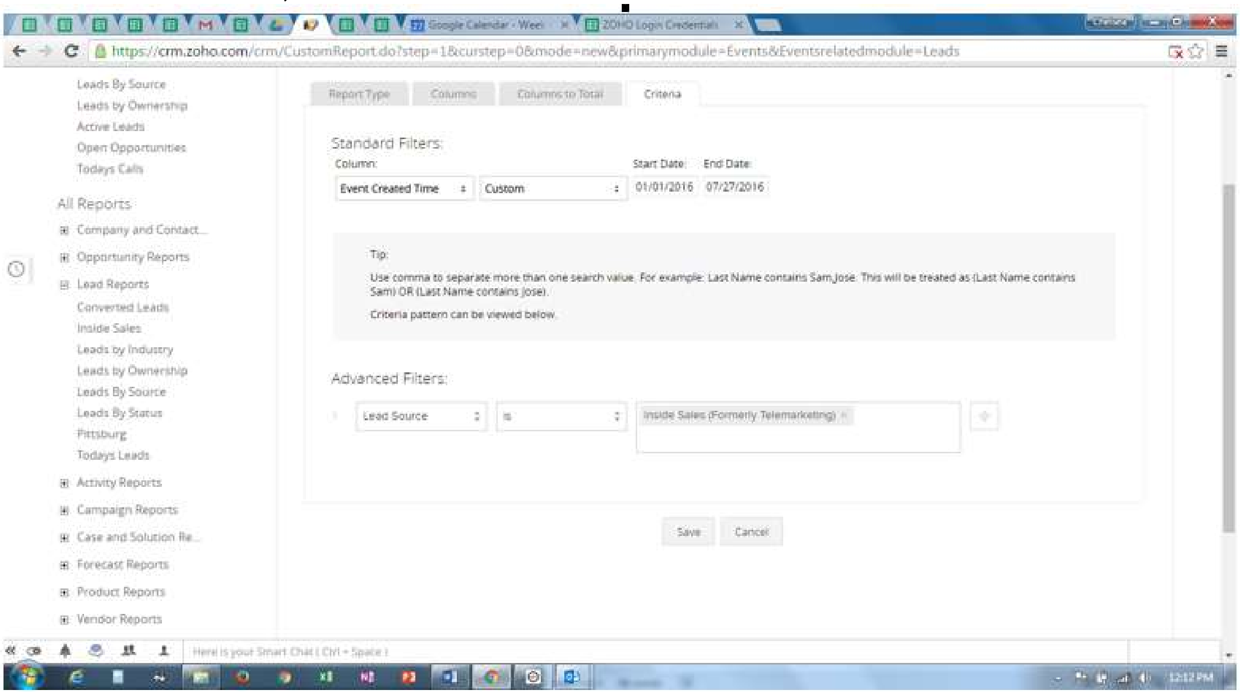
In the Create Report screen, Select Module: "Event" and Select Related Module: "Leads." Click Continue to move forward.



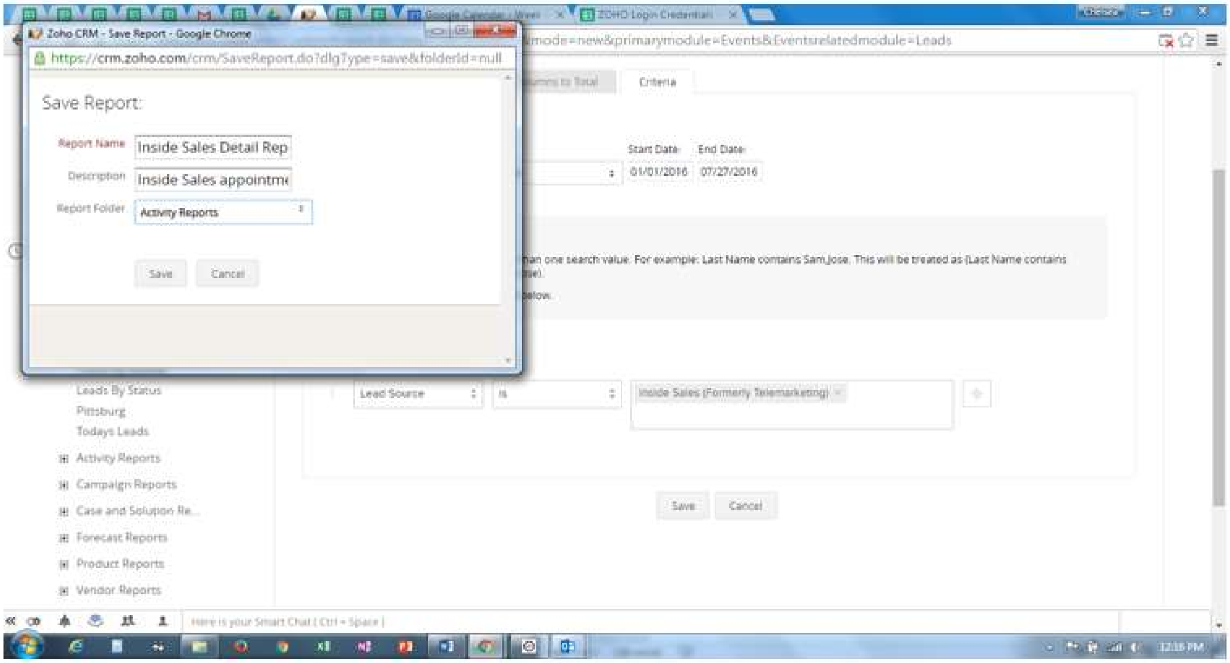
On the following screen, Click the second tab “Columns.” Select all of the columns for the report under Available Columns and Move them to Selected Column by clicking “Add.” All of the fields are listed in the screenshot below under Selected. Click Save.



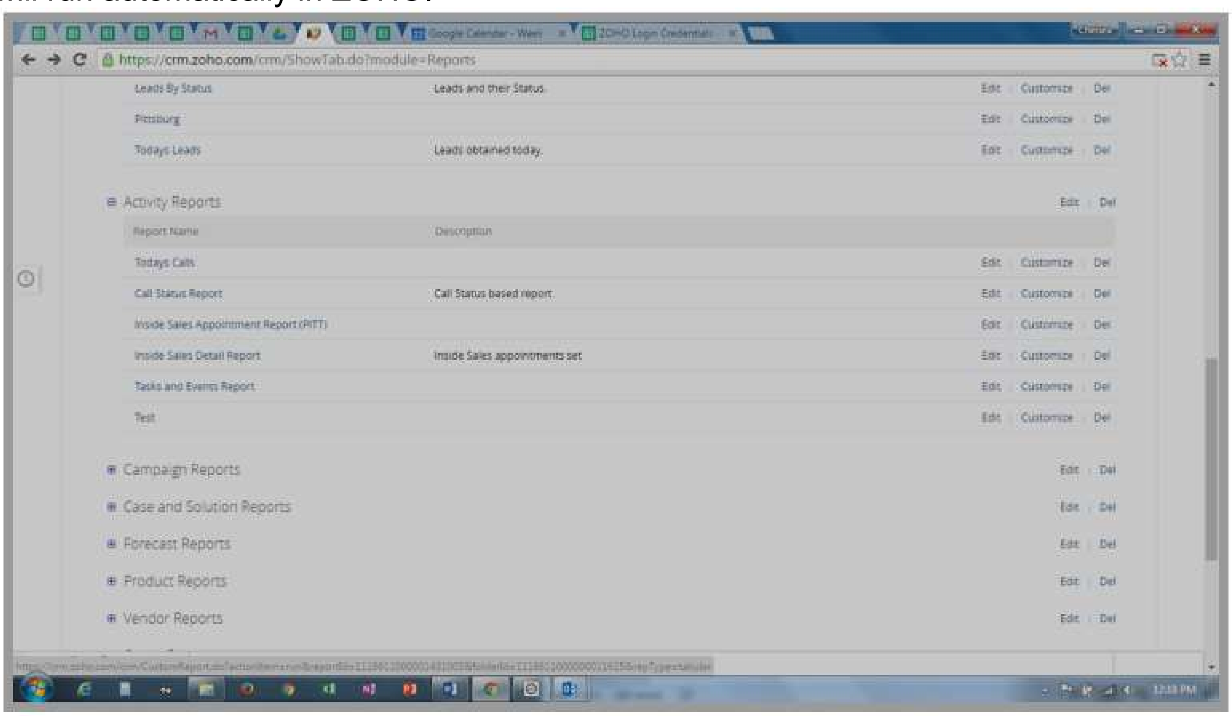
Click on the “Criteria” Tab. Under “Standard Filters,” select “Event Created Time,” then “Custom” and enter the date range for the data you want to pull. Under Advanced filters, select “Lead Source,” then “Is” and select “Inside Sales.” Click Save.



In the “Save Report” window, enter the name of the report and a description, then select the Report Folder you would like it categorized under. This is typically “Lead Reports” or “Activity Reports.” Click Save.



Your report is now ready to run. To pull it, go back to the reports home page by clicking the “Reports” tab, find the file in the Report Folder you selected, and click the report. It will run automatically in ZOHO.



If you would like to export your report, click “export” and select the file type you’d like. You can export to excel, csv, or pdf.