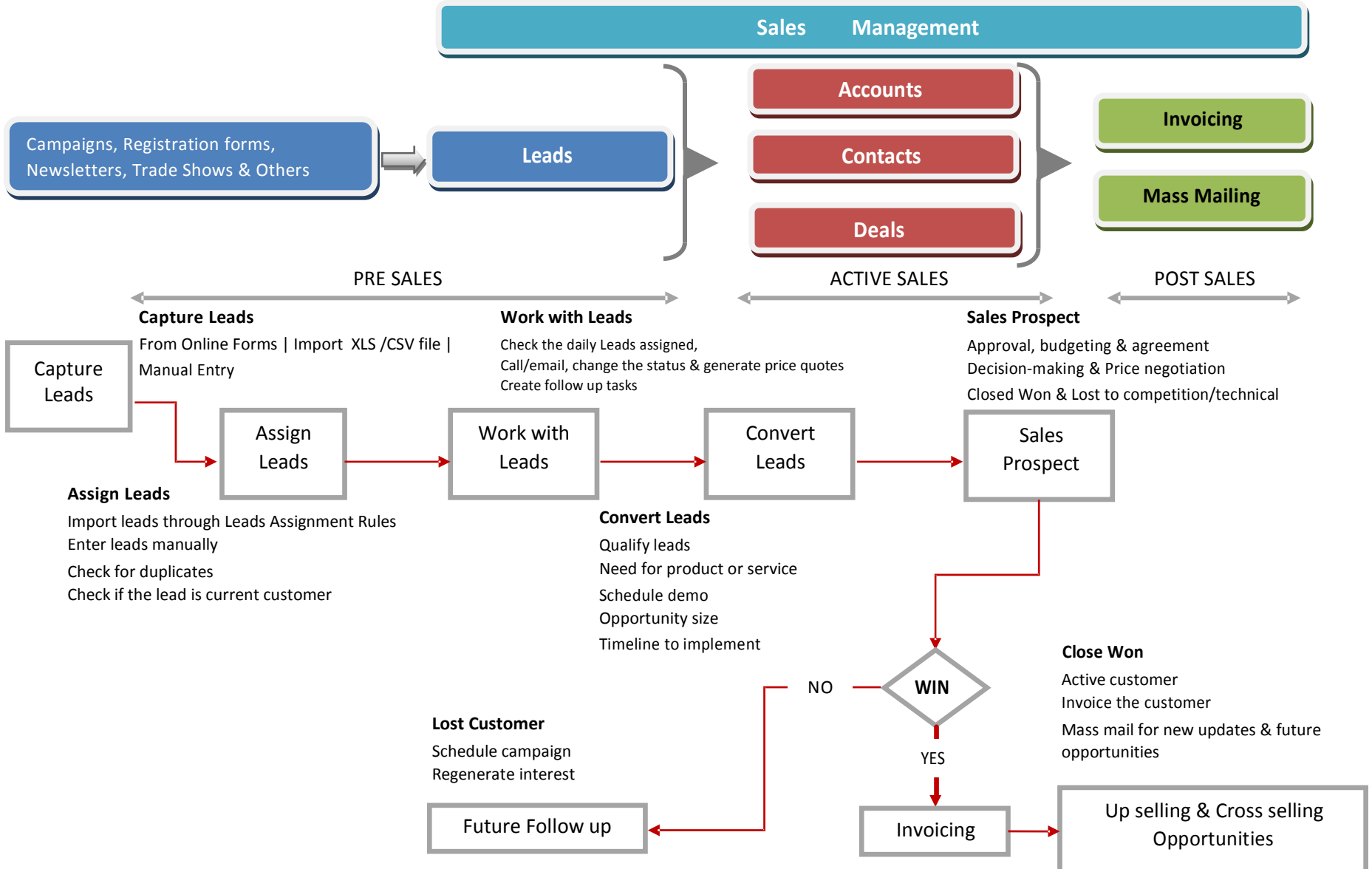


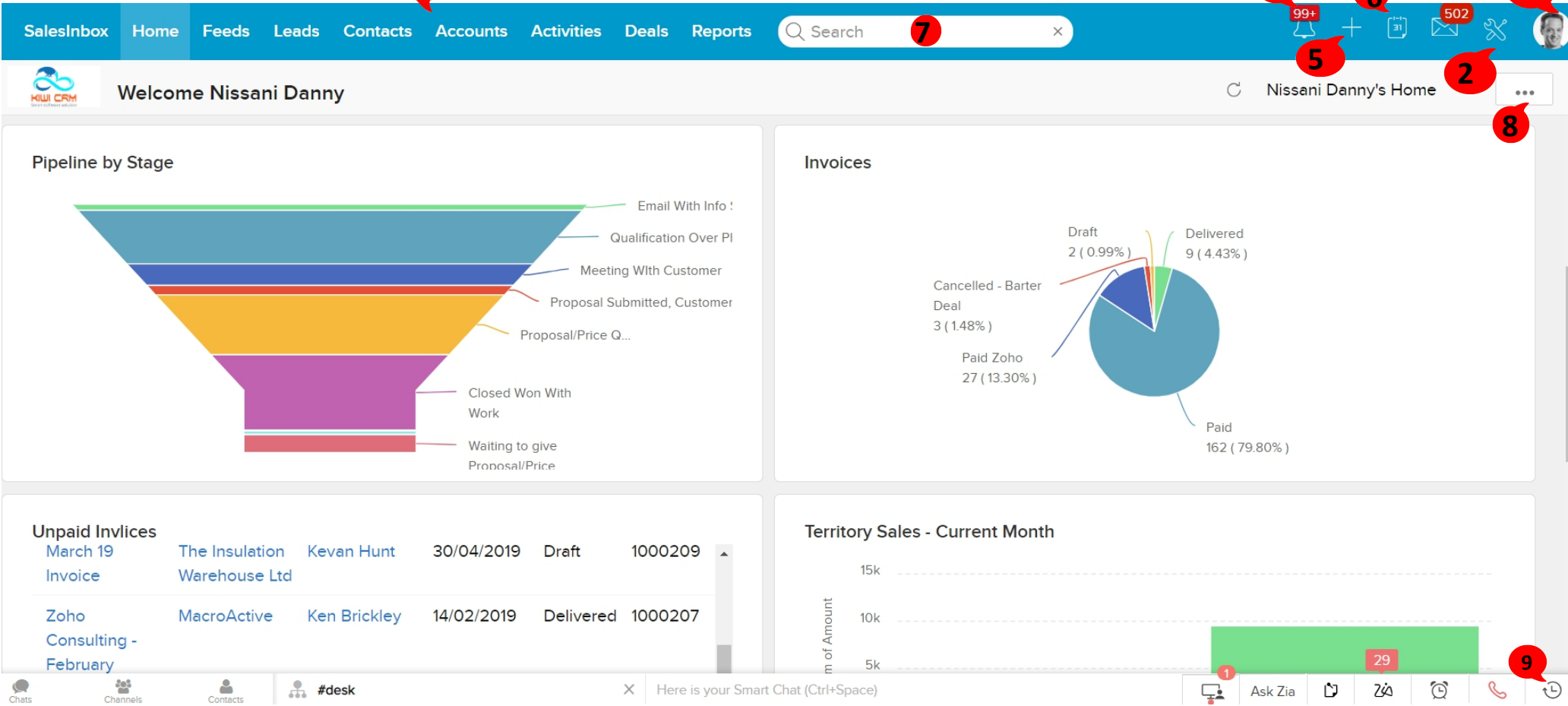
## Sales Overview

Welcome to Zoho CRM! This guide will help you get started fast, by explaining how to complete some of the most common tasks you will need to get the most of your Zoho CRM experience.



## Homepage Overview

To access most of the features, tools and options in Zoho CRM, you should get comfortable finding your way around the Top links modules and workspace.



The screenshot shows the Zoho CRM homepage for user Nissani Danny. The interface includes a top navigation bar with modules like SalesInbox, Home, Feeds, Leads, Contacts, Accounts, Activities, Deals, and Reports. A search bar is located in the center of the top bar. On the right side of the top bar, there are notification icons for 99+ messages, a calendar icon, and a mail icon with 502 notifications. Below the top bar, the user's name 'Welcome Nissani Danny' is displayed. The main content area is divided into four sections: 'Pipeline by Stage' (a funnel chart showing stages from 'Email With Info' to 'Waiting to give Proposal/Price'), 'Invoices' (a pie chart showing invoice statuses: Paid 162 (79.80%), Draft 2 (0.99%), Cancelled - Barter Deal 3 (1.48%), and Delivered 9 (4.43%)), 'Unpaid Invoices' (a table listing invoices), and 'Territory Sales - Current Month' (a bar chart showing sales amount). At the bottom, there is a chat window and a navigation bar with icons for Chats, Channels, Contacts, and a desk icon. Red callout boxes with numbers 1 through 10 point to specific UI elements: 1 (Manage Subscription), 2 (Setup & Configure Zoho CRM), 3 (Refer online help document), 4 (Modules/Tabs), 5 (Create new records), 6 (Access Calendar), 7 (Global search option), 8 (Add component to Home screen), 9 (View recent items), and 10 (SalesSignals & feeds).

1. Manage Subscription
5. Create new records
9. View recent items

2. Setup & Configure Zoho CRM
6. Access Calendar
10. SalesSignals & feeds

3. Refer online help document
7. Global search option

4. Modules (Tabs)
8. Add component to Home screen

## Getting Started

This section aims at providing you an overview of Zoho CRM's capabilities and guides you through the initial steps to personalize Zoho CRM as per your requirements.

Function	Purpose	Steps
<b>Add Users</b>	To add additional users into the Zoho CRM account	Setup > Admin Settings > Users > Add User
<b>Company Name</b>	To add personalized company name for all your business communication	Setup > Admin Settings > Users > Add User > Company Name
<b>Add Company Logo &amp; Currency</b>	To add your personalized company logo and fiscal currency	Setup > Admin Settings > Company Details > Edit
<b>Time Zone, Country &amp; Language</b>	To customize your personal settings	Setup > Personal Settings > Account Information > Edit
<b>Show / Hide Tabs</b>	To add /remove tabs as per your organizations requirement	Setup > Tab Settings > Organize Tabs
<b>Rename Tabs</b>	To change tab names as per your business process	Setup > Tab Settings > Rename Tabs > Edit
<b>Add Fields</b>	To create custom fields as per your organization's need	Setup > [Module] Settings > Field List > New Custom Field
<b>Add / modify Pick List</b>	To edit the default pick list values or to add new pick list values for modules	Setup > [Module] Settings > Fields List > Edit Pick list
<b>Remove Fields</b>	To remove default or unwanted fields from modules	Setup > [Module] Settings > Edit Page Layout
<b>Modify Field Property</b>	To change field either to mandatory or optional (read-only)	Setup > [Module] Settings > Edit Page Layout > Edit (Field Label)
<b>Add Section</b>	To have additional sections in a module and combine Certain fields within it	Setup > [Module] Settings > Edit Page Layout > Create Section
<b>Fiscal year settings</b>	To set the Fiscal start month of your organization	Setup > Admin Settings > Fiscal Year
<b>Custom View</b>	To set up custom view of modules based on field criteria	Setup > [Module] Settings > Custom View Settings > New View

Visit <http://www.KiwiCRM.co.nz>, to access detailed instructions, frequently asked questions and help document on using Zoho CRM.

Email to [Info@KiwiCRM.com](mailto:Info@KiwiCRM.com) and post your inquiries

Contact our technical support over phone at **+09 9408 101**