Zoho CRM User

Module 1: Records

- **What are records**
- **How to create a record**
- **How to delete a record**
- **Record ownership explained**
- **How to print a record**
- **Adding notes and attachments to records**

Module 2: Relationships

- **What are relationships**
- **Using record related list**

Module 3: Views

- **What are views**
- **How to change views**
- **How to edit views**
- **How to create and save views**
- **How to print a view**

Module 4: Filters

- **What are filters**
- **How to use filters**
- **How to create and save filters**

Module 5: Tags

- **What are tags**
- **How to create tags**
- **How to add and remove tags**
- **Searching using tags**

Module 6: Blueprints

- **What are blueprints**
- **How to use blueprints**

Module 7: Calendar

- **What is calendar**
- **How to use calendar**

- **How to change calendar preferences**

Module 8: Calendar Booking

- **What is calendar booking**
- **How to use calendar booking**

Module 9: Search

- **How to search for records**

Module 10: GDPR

- **What is GDPR in Zoho CRM**
- **How to use GDPR in Zoho CRM**

Module 11: Homepage

- **What is a homepage**
- **How to edit a homepage**

Module 12: Actions

- **What are actions**
- **Mass delete**
- **Mass update**
- **Drafts**
- **Autoresponders**
- **Approve records**
- **Deduplicate records**
- **Add to campaigns**

Module 13: Leads

- **What are leads**
- **How to create leads**
- **How to manage a lead**
- **How to approve and convert leads**

Module 14: Contacts

- **What are contacts**
- **How to create a contact**
- **How to manage contacts**

Module 15: Accounts

- **What are accounts**
- **How to create an account**
- **How to manage accounts**

Module 16: Deals

- **What are deals**
- **How to create a deal**
- **How to manage deals**
- **How to use the deals pipeline – won or lost**
- **Using the Kanban view for deals**

Module 17: Meetings

- **How to log a meeting (activities)**
- **How to log a meeting (records)**
- **How to manage meetings**

Module 18: Phone Calls

- **How to schedule a phone call (future)**
- **How to log a call (past)**
- **How to track a live call (live)**
- **How to manage phone calls**

Module 19: Email

- **How to send emails**
- **How to mass send emails**

Module 20: Reports

- **What are reports**
- **How to use reports**
- **How to create a report schedule**
- **How to create reports**

Module 21: Analytics

- **What is analytics**
- **How to use and edit analytics**

Module 22: Documents

- **What are documents**
- **How to upload and create documents**
- **How to access and manage documents**
- **How to download and share documents**

Module 23: Products

- **What are products**
- **How to create a product**
- **How to manage products**

Module 24: Quotes

- **What are quotes**
- **How to create a new quote**
- **How to send a quote**
- **How to manage and convert quotes**

Module 25: Sales Orders

- **What are sales orders**
- **How to create a sales order**
- **How to manage, send and convert sales order**

Module 26: Purchase Orders

- **What is a purchase order**
- **How to create a purchase order**
- **How to manage purchase orders**

Module 27: Invoices

- **What is an invoice**
- **How to create a new invoice**
- **How to manage and send invoices**

Module 28: Feeds

- **What are feeds**
- **How to use feeds**
- **Setting auto follow rules and preferences**

Module 29: Campaigns

- **What are campaigns**
- **How to create a new campaign**

- **How to manage campaigns**
- **Adding records to campaigns**

Module 30: Vendors

- **What are vendors**
- **How to create and manage vendor**

Module 31: Price Books

- **What are price books**
- **How to create and manage price books**

Module 32: Cases

- **What are cases**
- **How to create and manage cases**

Module 33: Solutions

- **What are solutions**
- **How to create a solution**