



Understand your CRM Account

Key CRM Terminologies

In any business environment, there are terms such as Leads, Deals, Campaigns, Invoices, etc. Following are the list of such terms and their definitions as used in Zoho CRM. You can refer to more such terms in the [Zoho CRM's Glossary](#). Check out the [CRM implementation guide](#) for step-by-step process to setup your CRM account.

Leads	Accounts
<p>Leads are the unqualified contacts or sales opportunities in your business. They are the raw details gathered about individuals or representatives of organizations collected from trade shows, seminars, advertisements and other marketing campaigns. A lead goes through the follow-up process by sales reps and when qualified, they're converted into an account, contact and deal (opportunity) in Zoho CRM.</p> <p>Watch video</p>	<p>Accounts are the companies or departments within a company with which you have business dealings. In Zoho CRM, single or multiple contacts can be associated to an account. In a typical B2B scenario (one business selling products or services to another business) accounts play a major role in keeping track of the important company information.</p>
Contacts	Deals
<p>Contacts are the people in an organization with whom your company has business communications in pursuit of business opportunities. Some of these contacts may belong to different departments in a company or multiple contacts of the same company. CRM contacts are typically converted from qualified leads, imported from an existing list or added individually based on the business relationship with the associated</p>	<p>Deals are the business deals with organizations (B2B) or with people (B2C), which generate real revenue for your organization. It evolves through different sales stages such as Prospecting, Qualification, Needs Analysis, Value Proposition etc. before it is actually a deal, lost or won. Leads that show interest in your business can be directly converted to opportunities</p>

company.

[Watch video](#)

that represent potential sale.

[Watch video](#)

Forecasts

Forecasts are the factual insights needed for making smart business decisions and anticipating future sales. They provide a personalized view of your real time business for tracking and fine-tuning the sales process in your organization.

Campaigns

Campaigns in Zoho CRM, provides a platform to organize and record the overall cost for marketing campaigns. It helps in marking the various stages, importing targeted contacts, associating all the tasks, events, and calls related to the campaign. Also, it gives a detailed view of all marketing campaigns an individual customer has been a part of.

Price Books

Price Books are the agreed price for selling a product to a customer. Based on the agreed terms, the prices can even vary for different customers. The unit price which is the price fixed by the manufacturer for the product and the list price which is the sellers' price can be quoted in the price books. Additionally, the discount ranges can be defined.

Vendors

Vendors are the companies, individuals or contractors from whom your organization procures products and services. The vendor details stored in Zoho CRM can provide better visibility on the vendors or suppliers for the future procurement of products.

Quotes

Quotes are legal agreements between customers and vendors to deliver the requested product within the specified time at the agreed price. A quote can be converted into a Sales Order or Invoice with a single click. Templates can also be created based on the quote details and can be sent to the customer.

Sales Orders

Sales Orders are the confirmation of sales generated after the customer sends a purchase order based on your quotes. A quote can be converted into a Sales Order with a single click.

Purchase Orders

Purchase Orders are legally bound order-placement documents for procuring products or services from vendors. Each product can

Invoices

Invoices are bills issued by the vendor to the customers along with the goods or services with the purpose of

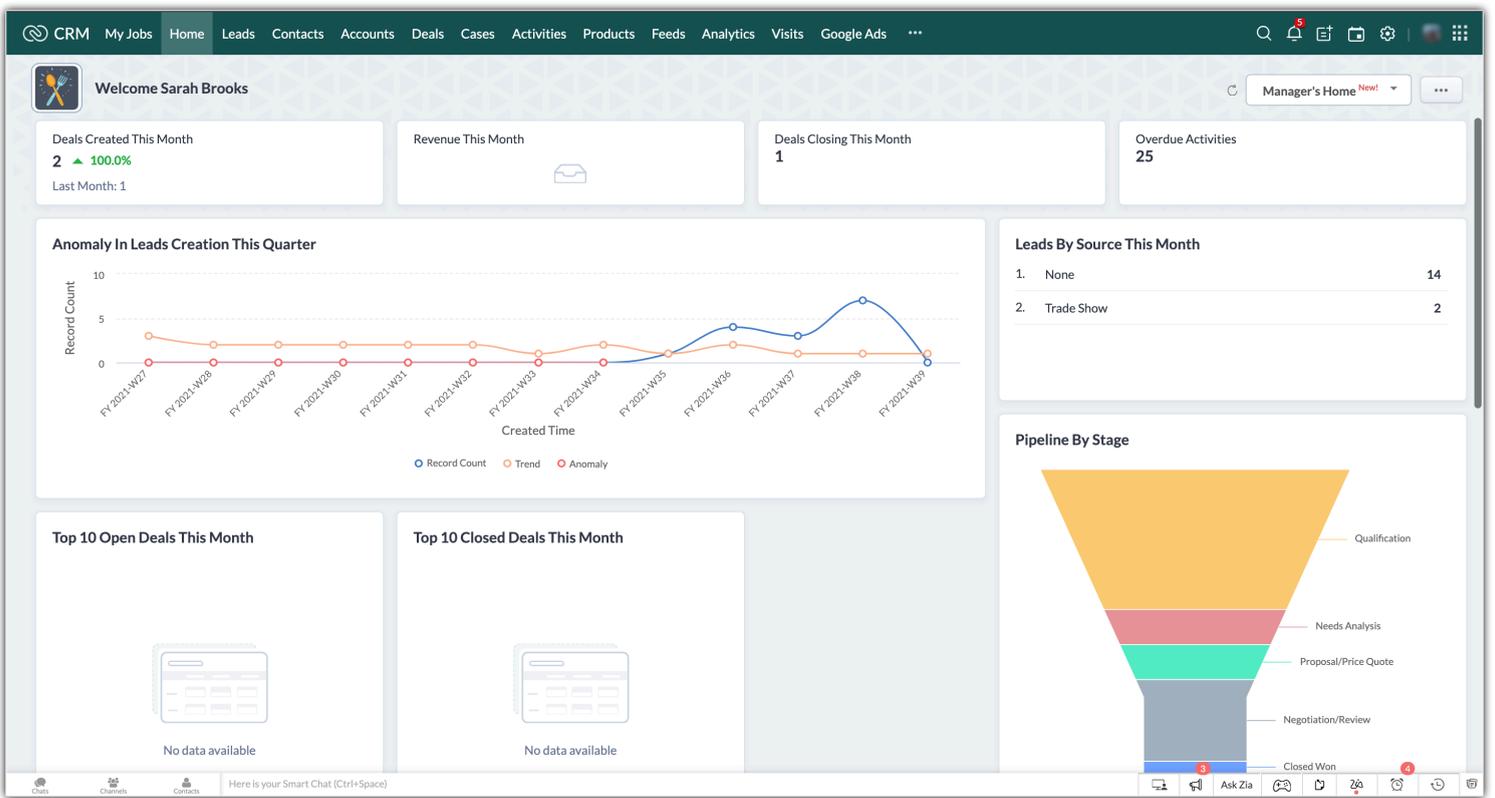
have a different reorder level to trigger the creation of a new purchase order.	receiving payments. A quote can be converted into a Sales Order or Invoice with a single click.
Module	Record
<p>In Zoho CRM, data is categorized into groups or divisions based on similarity. Each division that has similar data is called a "module". For example Leads is a module that contains all your business leads' details. Contacts, Accounts, Deals, Quotes etc are other examples of modules.</p> <p>In Zoho CRM, modules are of two major kinds - default modules and custom (or user-generated) modules.</p> <p>Watch video</p>	<p>"Record" is the generic name given to any entry made in a module. For example, if there are ten leads in the Leads module, each lead is a record. If there are 10 contacts in the Contacts module, each contact is a record and so on.</p>

Quick Screen Tour

Take a screen tour to know your CRM display better.

Home Tab

When you open your Zoho CRM account, the first screen that you see is the home page. Here, you can take a quick glance at the progress of your CRM activities. It is a dashboard that contains components from different modules, and you can customize the home tab by specifying which component to include.



1. List of modules.

2. Icons for Search, Feeds notifications, adding records, Zoho CRM calendar, MailMagnet, Setup.

3. Components in the customized view.

4. CRM footer with Ask Zia, Gamescope, Sticky notes, Zia notifications Activity Reminders and Recent Items icons.

Module View

The screenshot displays the Zoho CRM 'Leads' module. The top navigation bar includes 'CRM', 'My Jobs', 'Home', 'Leads', 'Contacts', 'Accounts', 'Deals', 'Cases', 'Activities', 'Products', 'Feeds', 'Analytics', 'Visits', and 'Google Ads'. The user's email 'sarah.brooks@zylker.com' is shown in the top left. A dropdown menu for view selection is open, showing 'List View', 'Kanban View', and 'Canvas View'. The main area shows a list of leads with columns for name, phone, company, title, and lead source. The leads listed are: Tim Gordon (Field and Yield), Robin White (Robin Enterprise), Beatrice Sully (Sully's creation), Sorin Petrescu (Zylker), Syed Hussain (Yellow Constructions), Betti Boland (Boland Cars), and Florian Ramen (Zylker). The bottom right shows 'Total Count: 22', '10 Records Per Page', and '1 to 10'.

1. List Views.

2. Different types of Views - List, Kanban and Canvas.

3. More options - Mass actions, Autoresponders, etc. based on the module.

4. Advanced Filters.

5. List of records in the selected module.

Record View

Kevin Forrest - Zylker inc 0 Score

Send Email Convert Edit ... < >

Related List Overview Timeline Last Update: a while ago

Lead Owner Sarah Brooks
 Email kevin@zylker.com
 Phone +1 (555) 555 5555
 Lead Source Trade Show
 Lead Status Not Qualified

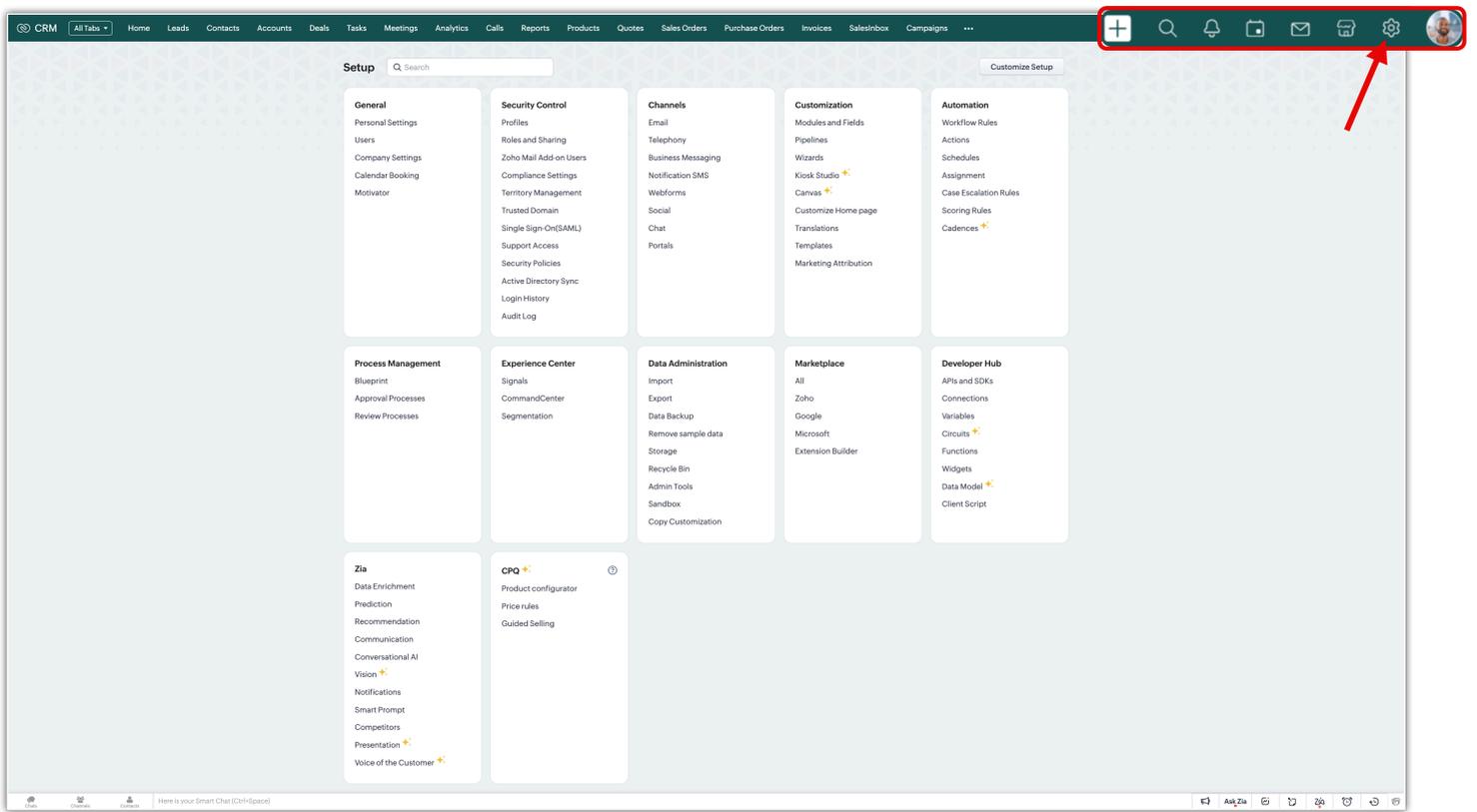
Hide Details

Lead Information

Lead Owner	Sarah Brooks	Company	Zylker inc
Co-owner	—	Lead Name	Kevin Forrest
Title	—	Email	kevin@zylker.com
Lookup 1	—	Fax	—
Phone	+1 (555) 555 5555	Website	www.zylker.com
Mobile	—	Lead Status	Not Qualified
Lead Source	Trade Show	No. of Employees	500000
Industry	ERP (Enterprise Resource Planning)	Rating	Active
Layout	Standard	Created By	Sarah Brooks

1. Info, Timeline and Data Privacy (when GDPR Compliance settings is enabled).
2. Related Lists short cut.
3. Related lists in detail.
4. Option to view the detailed information.
5. Business card view.
6. Actions to perform on the record - sending email, converting lead, editing, etc.

Setup Page



You can configure the settings of your CRM account by clicking on the Setup icon present in the header tab. Zoho CRM contains setup options for configuring General settings, Users and Control, Channels, Customization, Automation, Data Administration, Marketplace, and Developer Space. To begin with, you can configure the General settings initially, that will allow you to fill in your personal details and your company's details. Navigate to **Setup** > **General** to access the *General settings*.

SEE ALSO

[Introduction to Zoho CRM](#)

[Understand your CRM Account](#)

[Begin your Admin Journey](#)