

Zoho CRM for Sales Force Automation by Zoho One

Presented by... AQUAORANGE SOFTWARE CO., LTD. (HEAD OFFICE)

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11/7/22

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Partner In Thailand



Zoho One is an enterprise-grade SaaS Internet-based software that includes over 40 apps available in Zoho, which is equivalent to purchasing an operating system for a business. Zoho has over 50 million users in more than 180 countries around the world.

Zoho One is highly flexible and can be customized to suit individual use according to the company's relationship with its customers. Companies can get started with Zoho's CRM system first and then gradually.



Expandable to other Zoho apps or services. In exposure to Zoho Platform, users may start using Zoho apps which can be integrated with other platforms such as G-Suite, Microsoft. 365, Microsoft Dynamics 365 Business Central (NAV), AX, F&O ,SAP, Oracle Lazada, Shopee and other applications.

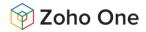
Sales interactions with customers are constantly evolving. More and more customers interact with pre-sales, sales and after-sales departments. The customer purchase experience goes beyond CRM and beyond Customer Service, and all of these interactions need to be flexibly adaptable. The software of Zoho One allows users to customize to suit their usage according to their needs. and according to the conditions according to sales activities

When the software in use can connect to the work of all. department together The user experience is unified. This unified user experience can only be obtained by using Zoho One. Departments can often work faster and more efficiently. Collaboration takes place proactively when information It's shared widely across apps across all departments. Zoho takes a proactive approach to developing the Customer Experience Platform, which works better than waiting for a bad customer experience to develop.

Zoho One Fully Integrated (End to End for Business Solution)



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Zoho One is a complete, modular business management suite to help organizations of all sizes. Every business can manage sales, marketing, finance, issuing contracts. project management after sales service Human Resources (HR) and others. Features such as

Zoho CRM

Sales Force Automation

Lead Management

Capture leads, automate lead scoring, identify leads that will convert, and follow up with detailed contact information.

 Lead management Generate, organize, and manage leads with ease Don't get bogged down by the sheer number of leads in your system. Use Zoho CRM to automate lead generation from multiple sources, like websites, chats, social

All Leads 👻				≣ IUI ¥ +	Import ••• ÅZ+
FILTER LEADS BY		LEAD NAME	COMPANY	EMAIL	LEAD SOURCE
Lead Name	UL 13 🗸	Thomas Gibson	Initech	thomas@initech.com	Facebook
Lead Status Lead Source		Dante	DMC Inc	dante@dmcinc.com	Facebook
is v	JUL 19 🤇	Shawn Michael	Tarnate Inc	shawn.mk@tarnate.com	Facebook
Face mok ×		Niko Francis	Zuhu Company	shawn.mk@tarnate.com	Facebook
Apply Filter Clear		Jones Rack	Redeker	jonesrack@redeker.inc	Facebook
		Carissa Batman	Oh My Goodknits Inc	carissa@0hmygoodnits.inc	Facebook

media, and trade shows. With lead scoring, distribute lead them to the right reps and ensure you don't miss out on converting quality leads.

• Nature more leads through omnichannel communication Don't just engage through email, make full use of Zoho CRM's omnichannel communication mediums to connect with your leads. Nurture leads through social media, telephone, live chat, and even in person. If webinars are your thing, you can integrate Zoho CRM with a host of popular online webinar hosting products and conduct lead nurturing webinars online and sync all your webinar related information to your CRM.

Melinda Anderson Calling EMAIL		LIVE CHAT		
Deal Owned America Bull rows Stage Proposal/Quote Probability (%) 75 Expected Revenue \$13,500,00 Closing Date 2021-07-29	SOCIAL MEDIA Lini Evans CLevans San Francisco, CA O Add as Lead © Add as Contr Layout Standard ~ Account Name Betacry Inc First Name Lini Last Name Evans Emai linites@bet.cor Owner Michelle Brow	 Chioe Reese Apex Corp. \$ 38,000,00 Pages Visited 5 Pages © 10:23 now in Pricing page Days Visited Last Visited 4 Visitor 80578 United Kingdom Pages Visited 2 Pages © 10:14 now in Contact page Days Visited Last Visited 	Email Status sent v In the last v 2 days v and status is opened onot opened bounced	Melinda Anderson Caling_ ANSWER Melinda Anderson Ventura Capitalists Open Deal 180 Widgets - \$18,000,00 Deal Owner Amella Burrows Stage Proposal/Quote Probability (%) 75 Expected Revenue \$13,500,00

Deal Management

Close more deals in less time. Track what stage your deals are currently in and seize every opportunity at the optimal moment.

• Know where every deal stands, at a glance Having a close eye on your deals is easier when you can see the deal stage as well as the numbers associated with it in a single screen. Know how much of your expected revenue is near closing, and which deals need immediate attention. Use Zoho CRM's advanced filters and sort functionality to quickly locate deals that fit your criteria so that you can take quick actions on them.

ID. DECISION MAKERS - 9 \$ 308,000.00 - 4 Dea		PROPOSAL/PRICE QUOTE \$ 84,500.00		NEGOTIATION/REVIEW \$ 1,130,000.00 - 4		CLOSED WON \$ 629,000.00	
700 widgets \$ 100,000.00 Snow White Bakers	Oct 20	75 widgets \$ 75,000.00 Tony and Presscott Pvt Ltd	Aug 15	200 widgets A deal \$ 20,000.00 Acme Inc	Jul 30	600 widgets A deal \$ 600,000.00 Optic illusions	Jul 22
1000 Widget A Deal \$ 100,000.00 Blue Rivers Pvt Ltd	Jul 22	25 widgets \$ 2,500.00 Smithson Publications	Jul 25	1	0 widgets 0,000.00	180 widgets Jul 27	Jul 29
2000 widgets \$ 100,000.00 Snow White Bakers	Jul 27	20 widgets \$ 2,000.00 Lawson Associates	Jul 29	100 widgets \$ 10,000.00 Thomas Publishers	White Bakers	\$ 6,000.00 Tony and Presscott Pvt Ltd	Jul 26
80 widgets \$ 8,000.00 Ventura Capitalists	Jul 24	10 widgets \$ 1,000.00 Homes For Sale Pvt Ltd	Jul 18	700 widgets \$ 1,000.000.00 Blue Rivers Pvt Ltd	Jul 23	50 widgets \$5,000.00 Treble Notes Inc	Jul 20

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衬 Zoho One

- Create distinct sales pipelines for different processes If you're dealing with multiple products or services, or you have different sales processes based on geography, a single pipeline is not adequate. Zoho CRM lets you create distinct sales pipelines that can be customized with the different stages to suit your sales process.
- **Deal stages at a glance** View what stage a deal is in and update it from the same place. If you're on a call with a prospect and the deal stage moves from "needs analysis" to "value propositioin", you can update it then and there.

Pipelines							?
This page allows you to manage van Layout Standard ~	rious sa	les processes by organising the l	Jeal stag	es indifferent pipelines.		+ New Pi	peline
Standard 36		🕑 Mid-market 14		Real Estate 10		SMB 6	
-None-		Qualification		Consultation		Qualification	
Qualification		Needs Analysis		View Properties		Proposal/Price Quote	
Needs Analysis		RFP Request		Take Virtual Tour		Negotiation/Review	
Value Proposition		Id. Decision Makers		Property Inspection		Closed Won	16
Id. Decision Makers		Value Proposition		Present Other Options		Closed Lost	91
Proposal/Price Quote		Proposal/Price Quote		Present Quotes		Closed Lost to Competition	91
Negotiation/Review		Negotiation/Review		Application for loan pre-ap	oproval	Add Stages	
Offer a Discount		Offer a Discount		Application Formalized			
Discount approved		Discount approved		Application Rejected			
Discount Rejected		Discount Rejected		Payment Processed			
Closed Won	4	Contract Sent		Add Stages			
Closed Lost	9 1	Closed Won	16				
Closed Lost to Competition	9 1	Closed Lost	91				
Add Stages		Closed Lost to Competition	91				
		A 44 5 to 200					

Deal stages at a glance

what stage a deal is in and update it from the same place. If you're on a call with a prospect and the deal stage moves from "needs analysis" to "value proposition", you can update it then and there.

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Dwner	Quinn Rivers &			
	Proposal/Price Quote			
bility(%)	75			
ted Revenue	\$ 1,875.00			
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⊘(⊘⊘		(m)	- 🐖 Jul 25 ~
	Proposa	I / Price Quote		

Started guoting from within CRM

Sending quotes to your customers shouldn't be a hassle. Create quotes the easy way from inside the Deals module. Include the most relevant product information, such as price and quantity, as well as customer data for easy record-keeping and organization. Work smarter by generating a personalized quote, and instantly email it to your customer from inside CRM.

Keep tabs on the competition During sales follow-ups, prospects want to hear what makes your solution different from the competition. Use Zoho CRM to take notes on competitors' strengths and weaknesses, helping you pitch the advantages of your solution better and improve the chances of closing the deal faster.

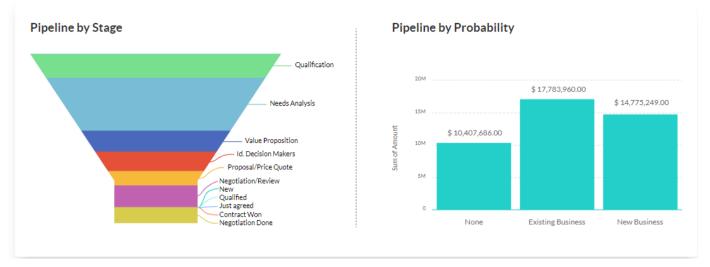
Deal Owner Stage	Quinn Rivers 2Q Id. Decision Makers		
Probability (%) Expected Revenue Closing Date	60 \$ 60000.00 July 27 ⊘		
Territory	Assign		
Competitors			
Competitor Name	Website	Strengths	Weaknesses
WinWinTech Inc	www.winwintech.com	Priced Lesser	Quality

🗂 Home	decor -	\$ 100,000.00 unfollow					send for e	Sign Edit	< >
Deal Owner Stage Probability(%) Expected Revenue Closing Date Quotes	Quinn Ri Id. Decisi 60 \$ 60000. Jul 27	ion Makers 00							+ New
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2	BillingAde	dress	Shippi	ing Address					
	Street City State Code Country Product D	#45 Sullivan St Boise Idaho 657 USD etails	Street City State Code Count	Boise Idaho 657	ıllivan St				
	# Produc	t Details		List Price (\$)	Quantity	Amount (\$)	Discount (\$)	Tax (\$)	Total (\$)
	1 Cobbl	estone Tiles (TY-02-78	0543)	46.00	360	16,560.00	331.20	486.86	16,715.66
	2 Oak V	Vood Panels (TY-06-67-	4803)	180.00	120	21,600.00	0.00	0.00	21,600.00
								Sub Total Discount Tax djustment rand Total	\$38,315.66 \$1,149.47 \$557.49 \$0.00 \$37,723.68

• Track your deal pipeline View in-depth reports about deals closing this month, daily revenue, sales stages, and more. Use dashboards to identify bottlenecks in the sales process and find areas for potential growth opportunities.

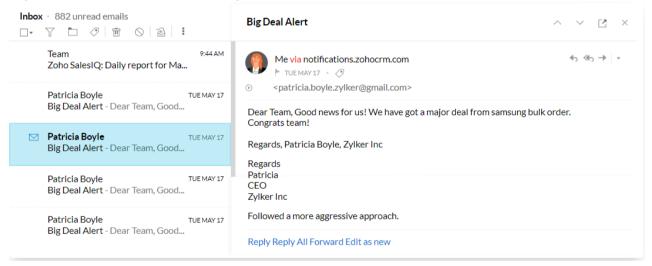


Exp. Track deal pipeline report



• **Celebrate sales together** Spead the excitement of closing big deals with colleagues and managers. Set up a workflow alert from CRM to share the good news instantly.

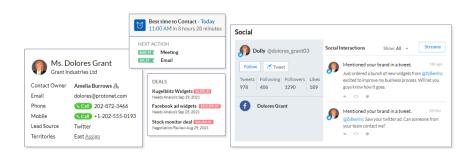
Exp. Workflow alert to Sales Manager or Sales Team



Contact Management

Foster strong customer relationships Turn your customers into brand ambassadors. With multichannel communication capabilities, Zoho CRM lets you exceed your customers expectations every time they contact you.

- ✓ Get real-time notifications from customers
- ✓ See a complete picture of all customer conversations
- ✓ Bridge the gap between your sales and support teams
- ✓ Support customer tickets and queries instantly
- ✓ Retain existing customers and find new ones easily
- **Communicate across channels** A customer or prospect can reach out to you in a number of ways. Respond to @mentions on Twitter, engage website visitors through live chat, call prospects, send emails, and manage all customer communication from CRM.
- Zoho makes it easy to track customer interaction, whether that is via telephone, live chat, email, social media or even snail mail. You will never lose track of your



customer communications with Zoho because it will send you real-time notifications whenever a customer interacts with your business by any channel.

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Email, Telephony, social media, Live Chat, Webforms, Self-Service Portals, Web Conferencing, Communication Context, Team Collaboration, Realtime Notifications

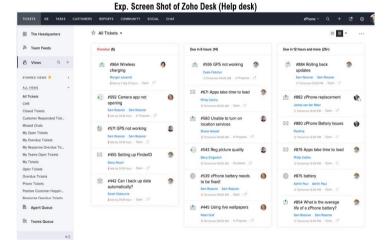
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Allen Kreger Betacry Inc 2 Pages 41 mins	7 May \$ 1800.00	Attended By Pages Visite	tracysmith@z	ylker.com Visit History		4	lays Visited	Last Visiter Yesterday	
Dave Alton RedGate Corp 3 Pages 60 mins	6 May	Actions Chat Chat Chat	Pages Chat with Quinn Chat with Quinn Chat with Quinn	Time Spent(mins) 13.67 5.04 22.45	Time 05/01/2019 06:24 Ph- 05/01/2019 06:21 Ph- 05/01/2019 06:14 Ph-	P	Inited Kingdo ages Visited 2 ow in Contact ays Visited	m Pages ((<u>Chat</u>) 10:14
=		Chat Accessed	Chat with Quinn http://www.zylker.com/	3.07 77.36	05/01/2019 05:28 Ph 05/01/2019 05:21 Ph	4 • J		Today	Chat

<u>Zoho CRM</u> streamlines team collaboration it's just that simple. Everyone can share information, ask questions, respond, track leads, answer queries from potential customers and engage across every possible channel.

Complete customer satisfaction

Zoho CRM works seamlessly with help desk software like Zoho Desk. With two-way help desk CRM integration, all your customer tickets are synced with relevant sales data and made accessible to your customer-facing teams, allowing them to provide a consistent customer experience.

Zoho CRM integrates with your help desk software to let sales managers keep in touch with their customer, work together with support teams to close tickets, and add more value throughout the customer journey.



Share in delivering customer satisfaction

Securing a sale is a milestone, but not the end goal of your business. The ideal goal for any business should be to convert their customers into loyal brand advocates. This can only happen if your customer-facing teams can work together to impress the customer.

Your sales account manager needs to keep a pulse on their customers even after the sale is over and ensure that their support tickets are given the right priority.

Your support team interacts directly with their clients and understands their needs on a close level. They need to be able to pass this information to the sales team so that they can continue to offer value to the customer through cross-selling and up-selling.

Info	6	Greene Alex - America E	ergen Co Send Email - Call Now Edit Schedule Webiner	~ ···
Timeline Last Update : 37 day(s) ago	All Tickets	Overdue Tickets	Avg. Response time Avg. Resolution time Customer Happiness Ratin	ng
RELATED LIST +	6	4	01:15 Hrs 12:00 Hrs 8	
Notes 💼	0	-	01.13 Ars 12.00 Ars 6	
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Sales Orders Real Estate	Invoices	Status	Amelia Burrows 18 Sep 11:48 PM (responded in 154 days) • 1	+ New ~
Purchase Orders	Subject	Closed	Hello Alex,	- New
Products ET	Digital Ma	Closed time 18 Sep 2018 11:48 PM	Yes, the zPhones support wireless charging. Do you want me to send you a specifications sheet>?	211
Zoho Projects	Digital Int	Phone		\sim
		09944644105	Thanks. Amelia	
Zoho CRM		Attempt Time	On Tue, 17 Apr 2018 18:15:26 +0530 Alex <alexgreene91@yandex.com> wrote</alexgreene91@yandex.com>	
		RMA Label Number	Hello there,	
		Exchange Approval	Alex. I'd like to place a bulk order for zPhones 8 Plus. Do the latest models support wireless charging?	
		Exchange Completed? -None-		

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11/07/2	021		2173	3.45	% 75	21%	450	2.71%	48	5165	91
10/07/2	021		6914	3.57	% 247	22.03%	1517	3.18%	191	6313	15
09/07/2	021		6305	3.73	% 235	23.06%	1454	3.5%	192	5765	-
08/07/2	021		8762	3.73	% 327	30.07%	2597	5.12%	371	11237	382

Email, insights, and more – powered by CRM

Analytics helps you constantly refine email communication with customers. Discover the best day of the week to send out emails and campaigns by analyzing open rates and learn which templates get the most responses. Set up your preferred email in Zoho CRM and use both together.

Know when to get in touch

Whether you're contacting the customer to resolve a support query or making a sales pitch for a new cross-selling opportunity, it's important that your call gets picked up. Based on your previous interactions with customers, Zia-Zoho's Al assistant-will suggest the best times to get a hold of them.

Pick the best time to make a call

You can reduce the number of unanswered sales calls with the help of Zia

My Today's Tasks 🖣	- Let Zia remin	d you				
	SUBJECT	STATUS	PRIORITY	CONTACT NAME	BEST TIME TO	CONTACT
	Email	In Progress	High	Joane Lee	10:30 AM	11:30 AM
TODAY	Meeting	Not Started	High	Lauren Cambell	09:30 PM	09:45 AM
TODAY	Email	Waiting for input	High	Peter Gallante	09:30 AM	12:30 PM
TODAY	Call	Not Started	High	Quinn Rivers	05:30 PM	
TODAY	Email	Deferred	High	Raghav Rao	04:30 PM	06:30 PM
TODAY	Email	Not Started	High	Martha Hills	09:30 AM	

Account Management

Zoho CRM account management is the process of managing your clients, companies, or any business partners in an efficient manner by using software or a web application know as the. CRM account management helps businesses to increase productivity and profitability.

- ✓ Closely manage accounts under your control
- ✓ Segment accounts based on recency, frequency, and monetary value
- ✓ Identify new sales opportunities
- ✓ Build long-term relationships with valuable accounts
- ✓ Keep an eye on all customer communications in one place
- See the whole picture View all your information from a single location, including the latest customer activity, associated contacts, pending deals, ongoing projects, and more. A complete view of your account makes collaboration easy, regardless of how the business changes.
- Cater to different needs of the same organization Giving your attention to each individual or department is easy when you treat them as separate accounts under the same parent account. By setting up a parent-child account relationship in CRM, you can manage daily operations and

interact with decision makers in a streamlined way.

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mails From/To	Subject	Date	Sent By	Source	Status
⊡ amelia.burrows@zylker.com	Confirmation of demo session	11:38 AM	Amelia Burrows	Individual	Bounced
Open Activities				+ New Task	+ New Event + New Call
Subject	Activity Type	Due Date	Call Start Time	Activity Owner	Modified Time
Meeting	Tasks	Jul 19		Amelia Burrows	Jul 15 06:27 AM
Response to feedback	Calls		Jul 1403:30 PM	Amelia Burrows	Jul 1106:42 AM

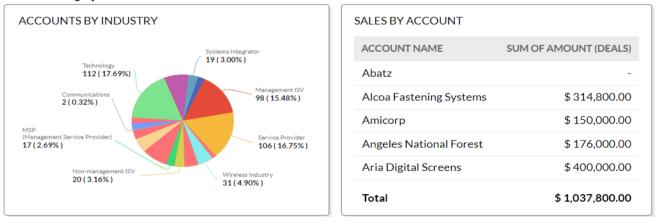
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One place to keep track of all your transactions Use Zoho CRM to generate sales orders and see payment
details within the account. Built-in inventory management functions allow you to generate invoices, collaborate with
vendors and partners, and ultimately keep tabs on all your transactions in one place. Zoho CRM also integrates with
popular accounting tools to manage your back-office operations.

📳 Blue Rivers	Pvt Ltd				Edit ···· <
ndustry La Employees 30 Annual Revenue \$ Phone &	melia Burrows & Irge Enterprise 20 7,000,000,00 (202) 346-3783 <u>ssi\$n</u>				
Sales Orders					+ New
Subject	Status	Customer No.	Due Date	Excise Duty	Sales Commission
Sales Order 1	Created	7624	Jul 22	\$1,750.00	\$1,750.00
Invoices					+ New
Subject	Status	Invoice Date	Due Date	Excise Duty	Sales Commission
Sales Order 1	Created	Jul 19	Jul 22	\$1,750.00	\$1,750.00
Open Activities				+ New Task	+ New Event + New Call
Subject	Activity Type	Due Date	Call Start Time	Activity Owner	Modified Time
Meeting	Tasks	Jul 19		Amelia Burrows	Jul 15 06:27 AM
Response to feedb	oack Calls		Jul 14 03:30 PM	Amelia Burrows	Jul 1106:42 AM

• **Discover key account-based insights** Get deeper insights about the accounts that you manage with Zoho CRM's built-in analytics. With a wide range of analytical components, you can quickly assess your priorities and complete tasks for important customers in a timely manner. Analytics also help you see which accounts are your most valuable, so you can assign your best team members to those accounts.



Key Accounts			Export ~ Ser	nd Email Edit ~ Create Char
ACCOUNT NAME	DEAL NAME	CLOSING DATE	STAGE	AMOUNT
Blue Rivers Pvt Ltd (3)	1000 Widget A Deal	07/22/2016	ld. Decision Makers	\$100,000.0
	10000 Widget B	07/23/2016	Negotiation/Review	\$20,000.0
	700 widgets	07/23/2016	ld. Decision Makers	\$1,000,000.0
				\$1,120,000.0
H I D Corporation (1)	40 widgets	07/28/2016	Closed Lost	\$4,000.0
				\$4,000.0
Happy Homes (1)	10 widgets	07/18/2016	Closed Won	\$1,000.0
				\$1,000.0
Lawson Associates (1)	20 widgets	07/29/2016	Proposal/Price Quote	\$2,000.0
				\$2,000.0
Smithson Publications (1)	25 widgets	07/25/2016	Proposal/Price Quote	\$2,500.0
				\$2,500.0
Snow White Bakers (1)	1000 widgets	07/27/2016	Closed Won	\$100,000.0
				\$100,000.0
Thomas Publishers (1)	100 widgets	07/20/2016	Id. Decision Makers	\$10,000.0
				\$10,000.0
Tony and Presscott Pvt Ltd (2)	60 widgets	07/26/2016	Closed Won	\$6,000.0
	75 Widgets	08/15/2016	Negotiation/Review	\$75,000.0
				\$81,000.0
Treble Notes Inc (1)	50 widgets	07/25/2016	Negotiation/Review	\$5,000.0
				\$5,000.0

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Workflow Automation

Working in sales and marketing, there's little margin for missed follow-ups. Zoho CRM's workflow automation makes your business hours more productive by finishing routine tasks for you.

- ✓ Automate sales routines instantly or at a later date
- ✓ Analyze the performance of your workflow automation with Zia Intelligence
- \checkmark Chain together multiple rules in a single workflow

• One rule. Multiple conditions

Form sending emails to customers to following up with leads to updating required fields, there's a lot you need to do every day. Workflow rules help you get that work out of the way by automatically triggering those actions when specified conditions are met. Set up to 10 conditions for a single rule, and increase the power of a single workflow 10 times.

Workflow Automation	Rules Aler	rts Tasks Field Upda	tes Webhooks	Custom Functions
Welcome email fo @ Leads	or tradeshow	leads 🖆 🚥		
WHEN	Create or E	rkflow during a Record Actio dit vill only be executed the first :		d.
	AND	ce IS Trade Show		
	<i>Ø</i> * Instant Act Alerts Welcome Email for Tasks Call for Demo + ACTION		∑- Sche	duled Actions
	AND	ce IS Trade Show		
+Add another condition	Ø+ Instant Act Alerts Welcome Email fo Tasks Call for Demo		∑⁺ Sche	duled Actions
Save Cancel	+ ACTION			

Zoho CRM follows up your way

Performing the right actions at key stages of your sales process is crucial. Zoho CRM comes with predefined actions like sending emails, scheduling tasks, and updating fields that let you automate different sales routines, either instantly, or at a later date. You can also define your own custom actions through the Zoho Developer space to meet your specific business requirements, like sending personalized SMS notifications to your customers when their orders have been confirmed, dispatched or delivered.

On-boarding leads : @Leads	đ
WHEN	This rule will be executed when a lead is Created
	(1) Lead Source IS Trade Show
-Add and ar condition	Ør Instant Actions Email Notifications ∑r Velicome Email for Tradeshow people
	Tag) Webhook Functions Send SMS

Approval Process Automate submission of records for approval

There are several instances in your business where your sales team needs approval from their senior managers-for example, pricing discount requests, contract review requests, capital expense approvals, vacation time approvals, and document approvals, Zoho CRM offers a dedicated approval management system running behind the scenes to standardize approval processes and save time by creating a dependable, repeatable system.

New Approval Process

Module	Deals 👻
Name	Bulk Orders
Description	Need approval from sales managers to initiate for bulk orders in HG category
When to Execute	Record Creation Record Edit
+ Add Rule to this process	1. Rule Criteria 3. Order Quantly > 50 App 3. Product Interested In CONTAINS HIS 2. Who should approve Choose the approver and set the order in which their approval is given. Users Fathing Yimaz Fathing Yima Fathing Yimaz Fathing Yima Fathing Yimaz Fathing Yima Fathing Yimaz Fathing Yima

Escalation Rules Escalate cases automatically when they meet your criteria

If cases aren't being solved quickly, Zoho CRM automatically escalates the overdue cases to the relevant manager or sales rep. You can configure a simple set of rules based on various criteria like priority, case name, or the time at which it was created to govern these actions and manage cases more efficiently.

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Sales Enablement

Quotes and Finance Grow your money within your CRM

Capitalize on your deals with access to the sales, expense, inventory, and subscription details of every customer in Zoho CRM thanks to the integration with Zoho Finance Suite.

- ✓ Generate auto-populated invoices with the benefits of CPQ (Configure-Price-Quote) via Sub forms.
- View order contents, status of shipments and outstanding balances.
- ✓ Compare periodic expenses with customizable dashboards.
- ✓ Get stock information that auto-adjusts with every order.
- ✓ Browse records of transaction history and subscription renewal dates.

• Generate invoices faster to seal the deal

Just because you mark a deal as closed doesn't make the money yours. With Zoho CRM, once a deal is accepted, it can generate an auto-populated invoice with the agreed upon terms that can be exported as a PDF and sent via email. This equips your sales team to rake in revenue immediately, before the customer reconsiders.

							Sales Order	
C	Constructio	on Contract					Invoice	
T	7 Add Tags							
	Quote Number	2021934000003521	088					
	Quote Stage	Closed Won						
	Quote Owner	Amelia Burrows						
	Valid Untill	May 10, 2021						
	Carrier	FedEX						
	Carrier	TEULX						
Prod	duct Details							
Prod #			List Price (\$)	QuantIty	Amount (\$)	Discount (\$)	Tax (\$)	Total (\$
	duct Details Product Detai		List Price (\$) 46.00	Quantity 360	Amount (\$) 16,560.00	Discount (\$) 331.20	Tax (\$) 486.86	Total (\$ 16,715.66
#	duct Details Product Detai Cobblestone T	lls						
#	duct Details Product Detai Cobblestone T	l is Tiles (TY-02-780543)	46.00	360	16,560.00	331.20	486.86	16,715.66
#	duct Details Product Detai Cobblestone T	l is Tiles (TY-02-780543)	46.00	360	16,560.00	331.20	486.86 0.00	16,715.60 21,600.00 I \$38,315.60
#	duct Details Product Detai Cobblestone T	l is Tiles (TY-02-780543)	46.00	360	16,560.00	331.20	486.86 0.00 Sub Tota Discoun Tao	16,715.6¢ 21,600.0¢ I \$38,315.6¢ t \$1,149.47 c \$557.49
#	duct Details Product Detai Cobblestone T	l is Tiles (TY-02-780543)	46.00	360	16,560.00	331.20	486.86 0.00 Sub Tota Discoun	16,715.66 21,600.00 I \$38,315.66 t \$1,149.47 c \$557.49 t \$0.00

• Resolve customer questions with confidence

Never let issues like old shipment addresses or a past-due payment get in the way of customer satisfaction. A simple integration with Zoho Inventory gives your sales team the information they need. Get instant access to details like order contents, status of shipments, and outstanding balances, eliminating the need to rummage through different apps or put the customer on hold.

Rem Inventory ~	Zy	iker Widgets Inc. ~		SO-0000	01		0 0 6		Create -	More - X
New Packa	age	Ziù Evaluate	packing geometry X	PACKAGES (1)		ENTS & HISTORY			17	Zoho CRM Detail
Package Slip#*	PKG-00001		0	PACKAGE SLIP#	SHIPMENT ORDER#	DATE	STATUS	CARRIER	TRACKING#	DATE OF SHIPMEN
Date*	06 May 2019			PKG-00001	SHP-00002	06 May 2019	SHIPPED	FedEX	#RTG45678RTYB	06 May 2019
Select/scan items	ude items to be packed from	the sales order by enal	ling the above option.		_				Show	v PDF View
ITEM DETAILS	QUANTITY ORDERED	QUANTITY PACKED	QUANTITY TO PACK	. cree						
2.0 DI				Zylk	er Widgets Inc.					
Cobblestone Tiles	1	o	1 Doe		Glendale Avenue			S	ALES O	RDER
		1	1	San J U.S.J	ose California 94088				Sales C	rder# SO-00001
FINANCE D	DETAILS			віц т	Contraction of the second					
Ordered Items				#45	ion Consultants Sullivan St					
Shipments In Pro	ogress 👻			Bols 657	e daho			Order D	Date :	06 May 2019
Receivables & Pl	and the second			USD				F	Ref# :	EST-000001
Total Sales : \$	2,846.00				Item & Descripti	ion		Qty	Rate	Amount
Outstandin Unused Cred	ig Receivables : \$2,00 its : \$0.00	00.00			2.0 DI			1.00 Each	2,800.00	2,800.00
				2	Cobblestone Tile	es		1.00	46.00	46.00

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• Track transactions at every stage

Zoho CRM auto-updates the status of transactions and even allows you to manually update them depending on whether the engagement took place online or offline.

SALES ORDER Sales Order# SO-00001					
STATUS					
Order	CONFIRMED				
Invoice	Not Invoiced				
Shipment	Pending				
REFERENCE#		EST-000001			
ORDER DATE		06 May 2021			
SALESPERSON		Amelia Burrows			

• Win your customer's loyalty the smart way

A large portion of revenue can come from recurring subscribers. Zoho CRM seamlessly integrates with Subscriptions to empower your sales representatives with information related to a subscriber's activity at the time of negotiation. The neat breakdown of transaction history, subscription renewal dates, and invoices under each account allows sales representatives to provide customers with appropriately priced offers and discounts.

	50.00 15	May 2021	18 May 2021 Activation Date	18	Sep 202 Expiry Date	21
Emailed To amy@n	itrofitness.com					
Plan & Addon Detai	ls Qty	Discount	Tax	Rate		Amount
Sports Pack	1	\$0.00	\$2	\$30.00		\$32.00
Setup Fee	-	\$0	\$6	\$20.00		\$26.00
				Total		\$58.00
ZOHO SUBSCRIP Subscriptions	PTIONS C	Subscription has b	een created successfully ×			
	PTIONS C Subscription ID		een created successfully ×	Status	Sub Total	Amount
Subscriptions	Subscription ID	Reference# Last		Status Trial	Sub Total \$00.00	Amount \$00.00

Submit and review your expenses the smart way

Drag and drop bills or access your system to attach them to an expense record using Zoho CRM's Expense integration. Track whether your reimbursements are pending, approved, or rejected at any point of the review process form within Zoho CRM.

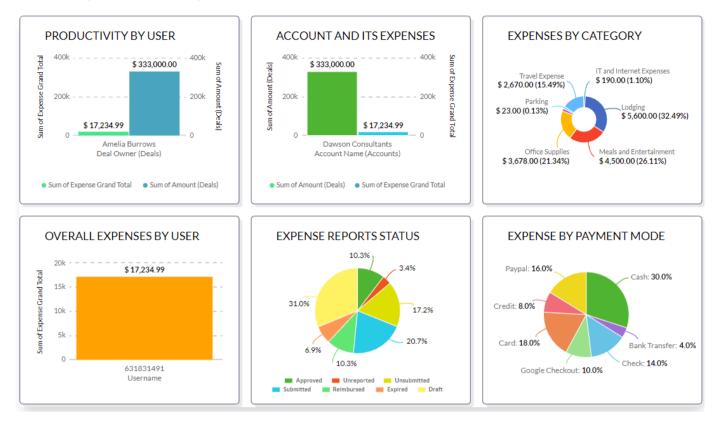
Add Expens				
Date * Merchant Category * Amount * Description	20 Nov 2019	Q Search	Drag Receipt(s) or click here to attach	NUMBER LINE COPY SUB_ CREV SHARE SLOP DOTEMAL 1. SUB_ CREV SHARE SLOP SUB_ CREV SHARE SLOP SUB_ STATE SUB_ STATE
Customer Potential	Options	Caros Open		APPRIATE There radi Contracts COPY
eference#	0789309			
dd To Report	US Travel	~		ts •

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• Educate your sales representatives to spend wisely

Build custom dashboards based on expense reports to inform your sales team's future financial planning. Hone their analytical skills with constant updates on recent deal outcomes.



Google Workspace and Office 365 Integration

Equipped with your favorite productivity tools Experience the best of Google workspace and Microsoft 365 functionality within Zoho CRM. Stay focused on winning deals rather than shuffling between multiple applications with centralized access to features you work with on other planforms.

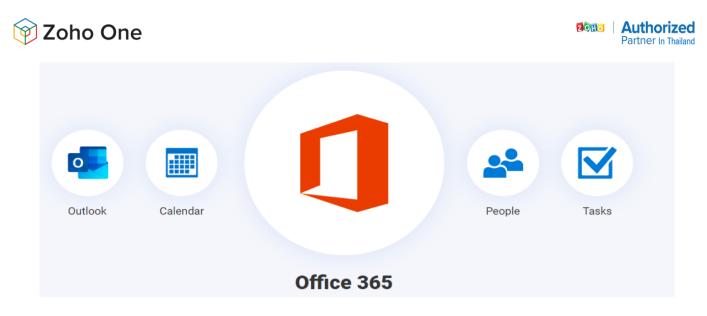
• **Google Workspace** Zoho CRM integrates seamlessly with Google's offerings. Attach documents from Google Drive, export events to Google Calendar, add contacts from Google Contacts, and configure Gmail directly from within Zoho CRM. Enjoy the familiarity of Google with the efficiency of Zoho CRM.



Google Workspace

- **Microsoft 365** Zoho CRM makes data migration from Microsoft 365 hassle-free. Just install the Zoho CRM app to begin seamless data and sync your calendar and contacts in no time.
 - Create, edit, and view all your contacts, tasks, and meetings on both platforms simultaneously.
 - ✓ Bring CRM dashboards and shareable records into your Microsoft Teams account to add context to your chats.
 - ✓ Avoid the pile up of obsolete contact information and add new leads or contacts with the click of a button.

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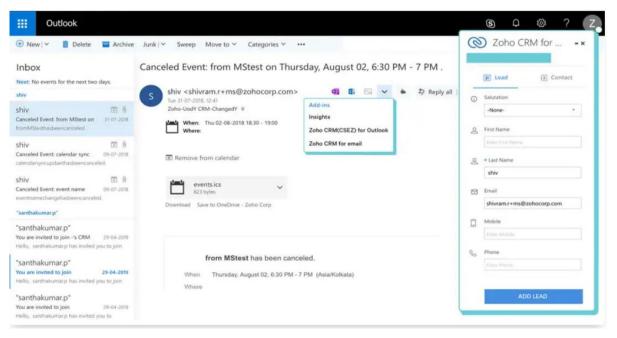
Access and update your Contacts, Tasks, and Meetings at all times

Customize data mapping, or auto-map data, between relevant fields in your Microsoft 365 and Zoh CRM accounts simultaneously with a simple synchronization process. Reschedule meetings, modify tasks, and update contact information on the platform of your choice.

8	Contacts		Events							
		ho CRM Contacts to Microsoft 365 Zoho CRM Contacts from Microsoft 365	Take your Zoho CRM Calendar to Microsoft 365 and manage Zoho CRM Calendar from Microsoft 365.							
	Enable		Enable							
0	utlook									
elerchi Pest	ple P	⊕ New) ♥ Manage ♥ Edit Delete Lists ♥		< August 2019 >	< >	August	2019 ~			
		Zoho CRM Contacts		SMTWTFS	Zoho CR	M Calendar				
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Frequer	rby contacted			11 12 11 14 15 16 17	28	20			1	
	r caluedar	Full rame	Email address	18 19 20 21 22 23 24						
Favorite		a mar Mittershale	ismer with only the flow bill com	25 26 27 28 29 10 31						
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Favorite	94 A.	a general James Watsonhale	james watsonhale@gmail.com anna.rose@thedisappered.com		4	5	6	7 JJ API Conferen		
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Favorite For follo Vour c Contect 1000Geo PSK	ontacts	400 Anna Rose HF Jenny Cooper	anna.rose@thedisappered.com jenny.cooper@gmail-Lcom	My calendars Calendar United States holi	4				nca	
Favorite For tolls Vour c Contact 1000Geo PSK Test	er er ontacts i	40 Anna Rose	anna.rose@thedisappered.com	A My calendars	4				nca	

• Add leads and contacts directly from your email

Save time and space on both platforms to exclusively accommodate revenue-generating contacts and leads by adding them directly from your email to your Zoho CRM database.



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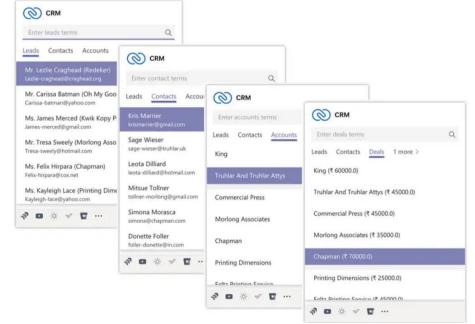
Feed your channel discussions with context

View dashboards within a tab in your Microsoft Teams account with accessible CRM data. Skip the hassle of creating presentations and make the most of your channel discussions with easy access to relevant information.



• Share and access CRM records over chat

Ever wasted precious minutes during important discussions or tasks searching for information related to leads, deals, accounts, and contacts? Look no further with the message extensions feature within Microsoft Teams. Users can share CRM lead, contact, account, and deal records over chat without having to access Zoho CRM.



Invite users from Microsoft 365

Convert your team members into Zoho CRM users with just a click. Access your Microsoft contact list within Zoho CRM and select team members you want to invite. Once a team member has accepted the invite, select their user profile role, customize permissions, and get to work in less than a minute. Likewise, an Microsoft 365 user can request the administrator to join Zoho CRM by accessing the Zoho CRM app within the Microsoft Platform.



Documents Library Easy document collaboration. Better productivity

Host a repository of your valuable collaterals within your CRM for quick access and accelerated collaboration among teams.

- \checkmark Centralized access to sales collaterals, data sheets and other relevant documents.
- \checkmark Attach documents to leads or deals and view multiple versions of your collateral using document tabs.
- \checkmark Share documents based on role hierarchy or project necessities with teams or individuals.
- ✓ A central library for all your sales documents Ensure the right people have access to the right documents and associate these documents with their respective deals with a centralized repository for all your sales collaterals.

Home Feeds Leads Acco	unts Cont:	acts Dea	ls Activities	Reports	Campaigns	Projects De	ocuments			
Create + Upload +									1-1 of 9 🛛 🔸 🕨	
All Files		NAM	4E				FOLDER	AUTHOR	TIME CREATED	
Documents	¥	~ 💌	13th May_So	anned Bill.jp	og		Document Library	Amelia Burrows	11:23 AM	
Pictures Music	z	2	Product 890	_Landscape,	jpg		Document Library	David Summers	11:22 AM	
Videos	ž	2 📄	Sales Pitch_F	inal.pptx			Document Library	Sharon Turner	11:20 AM	
Favorites	ž	2 📄	Third Quater	r_Sales.pptx			Document Library	Amelia Burrows	11:19 AM	
OLDERS	+ 5	2 💽	Sales Script_	Stage1.docx	c .		Document Library	Steffi Roger	11:18 AM	
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Folder Name				Use	rs ¢	Search M	fembers	of your	document repositor	
Sales Collaterals				0	Tai Chung			managing access privileges.		
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Sales Representative ×					Quinn Rivers				-	
Create Cancel					Add Cance	el		organiza	auon.	

✓ Link the right collateral with the right deal

Attach From Documents

≙ ↑ Name

Contacts agreement.pdf

Contacts agreement.pdf

Deal confirmation - agreement.pdf

Q Search

Recent Docs

Selected files

Folders

There is no need to dig through all your documents when you just want to send the latest sales material to your leads or contacts. The document library intelligently connects relevant collaterals with the appropriate lead or deal.

• Multiple versions

Have multiple versions of your sales collateral in the Documents Tab and access the latest draft of the document whenever you log in.

ZOHO

Authorized Partner In Thailand

Dealstagehist	ory.xls	x			>
Document	details	Revisions	Comment	Access Stats	
Cancel Check-out S	uccessful	I		🕥 Cheo	:k-Out
Details					
Version :	3.0				
Uploaded Time :	11:33 Al	М			
Size :	4 KB				
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	Downlo	ad Edit			

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Date Modified

Jul 11

Jul 11

Attach

Cancel



Sell On the move

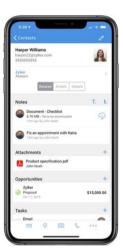
Stay on top of your business anywhere you go with the Zoho CRM mobile edition Access important

information, connect with clients, and make big decisions on the move.

- Stay up-to-date and gain insights on key metrics and sales trends.
- Access and modify your information even when you're offline.
- Record customer visits and add voice notes and files to deals with ease. ~
- Log calls and schedule follow up activities.



Seize opportunities and never let them slop through the cracks Contact data is just a click away. When you're out at lunch and remember a contact, you've been meaning to reach out to, you'll be able to do so right away with the mobile CRM app. Lock up contact information with the powerful global search and initiate a call right away. Log calls and jot down the specifics by adding notes, or just go ahead and record voice notes and convert them to text.



View all your customer activities in one

place Sales reps work some of the busiest, most deadline-driven schedules and are constantly on the move, which makes it challenging to keep track of sales activities. When all your data is easily accessible, your can get relevant customer data, deal information, and contact history necessary to make tactical sales pitches, with one quick look at your screen.

Get the most out of your day When you're • done with a client meeting and have some time to spare,

take the opportunity to locate prospects nearby, view their organization's location on the map, access the website links, and get all the information necessary before reaching out to them. Check the most efficient sales route to navigate to your customer's location. Check in at the client's location to record your visits and maximize Selling time on the road.

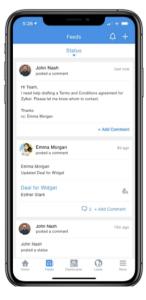
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	🖻 🥥 📖	S

Work from anywhere, anytime Say you're boarding a plane after a successful client visit and the

person seated next to you shows interest in your product over a casual chat. You can quickly access your documents and briefly describe your product with impressive digital resources such as brochures, videos, power points, and so on. Zoho CRM's mobile app makes it easy to access data from anywhere, at any time. Add and modify customer information in real time, even when you're offline. Changes made offline will automatically sync across devices once you're connected to a network.

Collaborate on the move Sales reps are the face of the company and every decision they make reflects on the brand of the company as a whole. With sales reps traveling to meet clients and prospects, it's hard to expect all team members to be in one location at the same time to make a collective decision. With feeds, sales managers can stay informed of their team's progress and guide them with valuable insights at crucial deal stages. Post the status of your tasks to keep them informed of your progress. View and comment on your team's posts and @-mention colleagues to bring posts to their attention.





Authorized

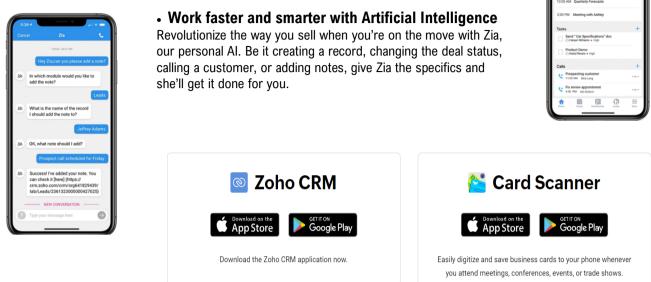
Partner In Thailand

2040

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Stay on top of your day's activities Plan your work day to stay on top of your day's activities. Whether it's talking to a customer, negotiating a deal, or sending out an email, get an overview of all your upcoming activities. Be well-prepared and informed, and improve your sales conversion rate. Set reminders for scheduled activities to know what's coming next, and to never let opportunities fall through the cracks.



Mobile App for Employee Check-Ins

Use a CRM mobile app and have your employees check in wherever they go. Associate a mobile check in with a meeting in your CRM. Using Zoho CRM's mobile app you can quickly see your calendar, choose a meeting day and time, then check in. Set access to who can delete or edit comments on these check in events.

Get exact geo-tag coordinates (Latitude and Longitude down to 6 decimal places) where the employee clicks the check-in button. The information is automatically collected and added to the meeting's details. Generate multiple reports about check ins and filter the results according to your needs using the build in Zoho CRM Reports Module.

- **Create A Meeting in your CRM** You can make a new activity in your Zoho CRM manually or by other methods such as a Zoho Bookings integration. Any Check Ins must be associated with a meeting in your CRM. The image below shows the Open Activities section of a particular Contact. This activity is the meeting we want to associate a mobile check-in with.
- Check-Ins Are Recorded with The Associated Lead/Contact & Meeting After your employee hits the check-in button, the geo tag information is automatically recorded.

ounts	Contacts	Deals	Zoho Fina	nce Acti	vities R	eports Anal	ytics S	ervices •					s • SalesIn	box Home Le	ads Accounts	Contacts Deals	Zoho Finance	Activities Reports .	Analytics Services ***
									Ser	nd Email Ca	ll now		Ace Roberts P	th Burkhardt & 4ost Blair Burkhardt	Company, LLC	:			
											-1	Checked In @ Jan 2 Monday, Jan 25 10:00 AM - 10:15			heck In Ti cheduled		ment Mee	eting Time	
	Act	ivity Type	Status	Due D	ate F	rom		То		Call Start	Time	Participants (1)							
with any, LLO		etings			Ji	an 25, 2021 10:	:00 AM	Jan 25, 2	2021 10:15 A	М		Moe Roberts @hotmail.c	om						
_											_	Other Information							
													Currency	USD				Exchange Rate	1
A	ctivity Type	Stat	us Due	Date	From		То			Call Start Time	_		Bookingid	FC-00025				Created By	Blair Burkhardt Set, 23 Jan 2021 08:15 PM
Ν	feetings				Apr 26, 20	19 11:00 AM	Apr 2	26, 2019 12:0	00 PM										Blair Burkhardt Sat, 23 Jan 2021 06 26 PM
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AquaOrange Software Co., Ltd. (Head Office)

1 The Empire Tower, Sathorn Road 47th Floor, 4703 Yannawa, River Wing, Bangkok 10120 Thailand Tel.+6626863440 www.aquaorange.co.th

Partner In Thailand







You can later view this check in and geo data in many ways, including viewing the Activities, Contacts, Leads, and Reports Modules.

CRM All Tabs + C	ontacts SalesInbox Services ***	Q Q + 🗊 🛛 🛠 I 🏂 🏢
← Mr. Moe Robert	ts - Test Company 1 Call now	Edit New Appointment -
Related List	Overview Timeline	Last Update : 08:59 PM
Notes 2 Zoho Projects 1	Notes	Recent First 💌
Attachments 1 Deals 5	Add a note	
Open Activities 1 Closed Activities 3	Checked In Moe Roberts @ Turtle Ridge, Irvine Met outside to chat about their business goals.	
Products 1 Invited Meetings 2		
Cases Emails 4	Leafler @ Zoho Maps Attributions	
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Campaigns Social		
Zoho Survey Reporting Contacts	•	
Visits - Zoho SalesIQ 10+ ZohoSign Documents 1	Leafer I @ Zoho I Maps Attributions Meeting - Followup * ④ Apr 24 2019 by Blair Burkhardt	
Referrals 1 Zoho ShowTime	Zoho Projects Active Projects •	New Project Associate Project
Add Related List	Project Name Project Completion Milestones	Tasks
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You can later view this check in and geo data in many ways, including viewing the Activities, Contacts, Leads, and Reports Modules.

Sales Order Reports Purchase Order Reports	Meeting Reports S	eports Adv	ranced Analytics for Zoho CR powered by Zoho Analyt
Invoice Reports	Delete Move to Folder ~		
Sales Metrics Reports	🗌 Report Name 🗸	Description	Last Run Date
Email Reports	Planned Vs Realized Meetings this Month	Know how many planned check-ins have been realized in the current month	Now
Meeting Reports Visits Reports	☑ ★ Number of Check-Ins by Salesperson	Get number of monthly check-ins for customers completed by each Salespersor	n Now
Zoho Finance Reports	☑ ★ Number of Check-Ins by Locality	Get total number of monthly check-ins for customers by locality	2 min ago
Territory Reports	🗹 🛨 Check-Ins for Leads	Get check-in details for each Lead	3 min ago
Google AdWords Reports	Check-Ins for Accounts	Get check-in details for each Account	4 min ago
🛱 Recently Deleted	🗹 🛨 Check-Ins by Locality	Get check-in details categorized by locality	7 min ago

Below shows the "Check-Ins for Leads" report, generated in Zoho CRM.

Filters ~										Hide Detail
FULL NAME	CHECK-IN BY	TITLE	CHECK-IN COMMENT	CHECK-IN TIME	CHECK-IN SUB- LOCALITY	CHECK-IN CITY	CHECK-IN STATE	CHECK-IN COUNTRY	ZIP CODE	CHECK-IN ADDRESS
Tana Sama Si	Blair Burkhardt (1)	Free Consultation with Burkhardt & Company, LLC		Jan 23, 2021 08:31 PM	Turtle Ridge	Irvine	CA	United States	92603	Climbing Vine Irvine CA United States 92603
TOTAL RECORDS IN THIS PAGE :1 RECORDS										

Below shows the "Check-Ins for Accounts" report, generated in Zoho CRM.

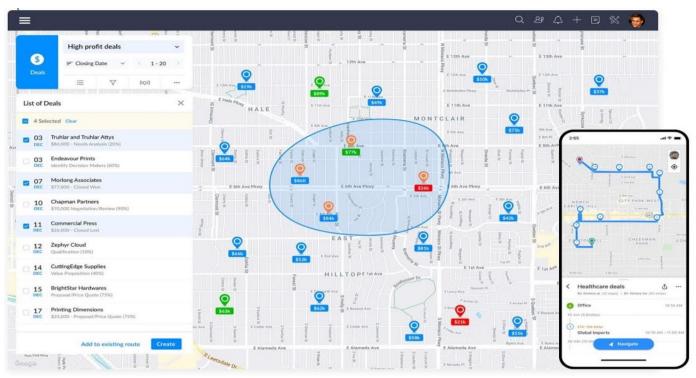
Check-Ins for Accounts								Export ~	Send E	mail Edit ~ Create Chart
Filters 🛩										Hide Deta
ACCOUNT NAME	CHECK-IN BY	TITLE	CHECK-IN COMMENT	CHECK-IN TIME	CHECK-IN SUB-LOCALITY	CHECK-IN CITY	CHECK-IN STATE	CHECK-IN COUNTRY	ZIP CODE	CHECK-IN ADDRESS
Test Company 1 (1)	Blair Burkhardt (1)	Followup		Apr 24, 2019 10:45 AM	Turtle Ridge	Irvine	CA	United States	92603	Garden Ter Irvine CA United States 92603

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Zoho Route IQ

Travel less, meet more Tired of spending hours to plan sales routes by yourself? No worries! RoutelQ saves your valuable time by creating optimized route plans automatically in a matter of seconds!



• Route – Plan, Optimize, Navigate

- Plan a route which is automatically optimized based on the distance, appointments, and drop-ins
- o Adjust the route as you go if there are any cancellations or new customers to add
- Single-click navigation to any customers or any planned routes
- **Map Visualize** Visualize your Zoho CRM leads, deals, contacts, accounts, and events on an interactive map and filter prospects matching your specified criteria.
- **Explore nearest** Explore your CRM leads, deals, contacts, accounts, and events nearby.

Performance Management

• Sales Forecasting Build accurate forecasts powered by real-time data

Forecast your revenue and assign targets for your team using key information like the number of deals in the pipeline, the quotas achieved during the last fiscal year, and the individuals or teams that making the most progress towards their goals. Identify bottlenecks using real-time data and boost your team's performance.

- ✓ Build multiple conditional forecasts for your business
- ✓ Prepare accurate forecasts with Zia's predictive forecasting
- ✓ Split deals in your pipeline with "Best case" and

Streamline your goals with multiple forecasting Setup multiple forecasts that consolidate all your deals or just the deals that match specific conditions in your pipelines, for different forecast periods. Zoho CRM lets revenue leaders set solid targets for their sales teams, while giving managers and decision makers greater visibility and control over revenue in the pipeline.

- **Build multiple forecasts for different forecast periods** Create conditional forecasts for different forecast periods to predict your sales performance more accurately.
- **Predictive forecasting for your targets and achievements** When creating a forecast for a new period using a previous forecast as a template, businesses can leverage Zia's suggestions for company-wide and individual targets based on the historical data of the selected sales forecast. User's historical and current deal closure pattern will also be analyzed to give you a predicted target achievement for each user in your business hierarchy.





Forecast for premium deals	Deal Revenue				Create for Next period	Set Target Quickly set target +	
Period	Target	Achievement	Gap	Predicted Achievement	Current open deals	Company Target	
Q1 2021 Current Quarter	\$1,000.00	\$2,650.00 (205%)	▲ 165%	-	\$3,000.00 (2,100.00/ 600.00/ 300.00)	Zylker Inc \$ 10000	
Fatimay Zeref	\$234.00	\$1,100.00 (470.08%)	▲ 370.1%		\$300.00 (100.00/ 100.00/ 100.00)	CEO #1 \$ 10000	
Manager	\$2,002,323.00	\$1,550.00 (0.07%)	▼ 99.9%		\$2,700.00 (2,000.00/ 500.00/ 200.00)	Patricia Boyle \$ Current Deale (51 400 00)	
Q2 2021	\$1,000.00		▼100%		· ·	Current Deals (\$1,400,00)	
E Q32021	\$10,000.00		▼ 100%			Manager 1.4 \$ \$100 S100 S100 Committed	\$1,00 Close
orecast for entire sales	eal Revenue					🔞 Nathan Brooks 🏝 🖇 🗌	
Period	Target	Achievement	Gap	Predicted Achievement	Current open deals	(9) Jasmine Frank \$ Predicted target 80% 60	%
	\$1,000.00	\$2,650.00 (205%)	▲ 165%	-	\$3,000.00 (2,100.00/ 650.00/ 250.00)	\$5,000	
Q1 2021 Current Quarter						Set as target Q4-2020 Q3-2	020
 Q1 2021 Current Quarter Q2 2021 	\$500.00	-	▼100%			\$ 1.000 / \$5,000 \$3,000 /	000.22

- **Predictive forecasting with AI recommended targets Zia** analyzes your historical forecasting and performance data to recommend the most accurate targets for your business.
- **Transparent pipeline for accurate forecasts** Get complete transparency into open deals, committed deals, and best cases, so you can set realistic goals that your team can meet.

Forecast for Premium Deals - Q1 2021 Deal	Revenue	Cancel Save	Forecast for Premium Deals - Q1 2021	Deal Revenue	Cancel Save
Set Target Quickly set target * Company Target \$ 10000 Company Target \$ 10000 CEO & 1 \$ 1000 CEO & 1 \$ 1000 CEO A1 \$ 1000	Current Deals (\$1.400.00) \$100 \$100 Predicted target \$00% \$5,000 Q4-2020 Q3-2 Set as target \$3,000 / \$50.00 \$3,000 / \$50.00	2020	Set Target Quickly ver target - Company Target \$ 10000 - CEO #1 \$ 0000 - CEO #1 \$ 00000 - CEO #1 \$ 00000 - CEO #1 \$ 00000 - CEO #1 \$ 00000 - CEO	Current Deals (\$1.400.00) \$100 \$100 Pipeline \$100 Predicted target 6005 \$5,000 \$4000/55.000 Set surget 9005	2020

Territory Management

Easy customer segmentation with simple territory management software Whether your company organizes sales teams around geography or product lines, territory management can handle any form of customer segmentation. Share accounts among territories, identify regions that make a profit, allocate resources, and exceed sales forecasts, all while offering excellent customer service.

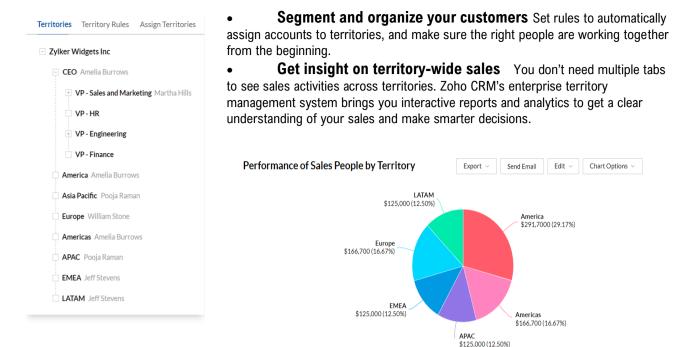
- ✓ View revenue generated by teams classified based on region, product and other relevant criteria.
- \checkmark Set rules to assign accounts to the right sales representative.
- ✓ Analyze sales activities across territories with vivid and interactive reports and graphs.
- Set and track sales targets effortlessly Get a consolidated view of closed deals and forecast your sales region with the best territory management software. Analyze each region by identifying teams that are making a profit and the best performing sales representatives.

	counts Contacts De	als Activities Reports			9 4 + 9 %
Forecast Summar	у			+ Creat	View Settings
Americas > USA ~	July ~ 202	1 ~ Compute	Compute All		
USA					
Target		Achieved	Pipeline Deal		
\$ 10,000	0.00 \$8,	,700.00 (87%)	\$10,100.00		
\$ 10,000 Ferritory Users NAME	0.00 \$ 8, target	,700.00 (87%) ACHIEVED	\$10,100.00 PIPELINE DEAL	PIPELINE DEAL%	PIPELINE SHORTAGE%
Ferritory Users	:		:	PIPELINE DEAL%	PIPELINE SHORTAGE%
Ferritory Users	TARGET	ACHIEVED	PIPELINE DEAL		PIPELINE SHORTAGE%
Ferritory Users NAME Amelia Burrows	TARGET \$4,000.00	ACHIEVED \$3,000.00	PIPELINE DEAL \$5,300.00	75.0	PIPELINE SHORTAGE%

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AI Prediction

Sales forecasting done smarter with AI You invest so much time and effort into winning over a lead or a deal, with no clear indication of whether it's worth it. After several interaction, you might get a sense for it, but as new leads pour in, it's hard to keep track of which conversations will pay off. But with Zia's sales forecasting, this will never be a problem again. Zia can assign a score to every lead and deal on the table, using predictive AI to determine whether or not the deal will go through.

- ✓ Identify the status of every deal
- ✓ Disqualify bad leads and free up the pipeline
- ✓ Assign talents based on the prediction score
- ✓ Focus on closing the most probable leads
- ✓ Measure how your sales strategies fare

Zia knows what's closing

There's no surefire way to know the exact outcome of a sales-that's why Zia learned sales forecasting. Zia makes a comprehensive study of your sales data to decode the patterns behind wins and losses. From there, she can effectively predict the chances for each lead and deal to convert and assign an intelligent score to them for salespeople to utilize.

Have a clear view of the

forecast Zia makes it easier for you to focus on the right leads and deals by breaking them up in Zia View. Here, records are split into three columns: likely to win, to lose, and to go either way. This makes it convenient for

The salesperson to prioritize them.

•

- Filter in to focus Use Advanced Filters to sort out records with similar patterns, scores, or activities. You can pinpoint records within a certain score range, a specific forecasting score, or a status, which helps you zero in on the promising deals you're looking for.
- Know where the action is Not all records move at the same pace. A deal that has been pending for ages might be on the verge of closing. A lead that you thought was a sure thing might be left unattended. Zia defines these records as "trending up" or "trending down," depending on whether they're becoming more likely to win or lose. Use the Advanced Filters to zero in on these records.

All Territories+ All Deals +					ة ا‼ ≣	始 [十 Impo	rt ••• Å	
FILTER DEALS BY	DE	EAL NAME	AMOUNT	CLOSING DATE	PREDICTION	STAGE	CONATCT	
Prediction	FEB 1 10	0 Custom Widget deals	\$ 3,000,000.00	Feb10, 2021	90	Negotiation Done	Leota Dilliard	
 Likely to Win ~ Records to focus 	🛛 FEB 1 🖌 Gr	rant Industries Ltd.	\$ 2,000,000.00	Feb 15, 2021	85	Needs Analysis	George Bailey	
Prediction Score	🛛 FEB 1 🖌 AV	valon Chems Deal	\$45,000.00	Feb 3, 2021	82	Value Proposition	Melodie Bibbie	
> ~ 60	🖾 FEB 1 🗶 Tel	rraform Real Estate	\$55,000.00	Feb 22, 2021	76	Qualification	Mark Boucher	
Email Sentiment	D JAN 31 Ph	harmPlus	\$55,000.00	Feb 22, 2021	70	Needs Analysis	Dolores Grant	
Email Status	JAN 31 K He	enderson Hardware	\$52,400.00	Feb 21, 2021	70	Value Proposition	Kitzman Chau	
Activities								
Notes Closing Date								
Potential Name								
Amount								
Account Name								
Cc								
All Deals + Filter POTENTIALS Touched Records Untouched Records		Prediction View Likely to win in 10 \$ 152,491	Sort By None		≣ ¹ 2 THIS MONTH 4	☆		
Record Action Related Records. Prediction Email Sentiment	Action	Deal Name UI Widget Contact Name Emily Grace		UI Widget Tomoyo Saya Samuel Turn		FX7 Twicx It Robert Jaison		
Email Status Activities Notes Closing Date	Notes		ner	225/55/R17 Aston Miche Rachel Strat	als	UI Widget Mathew Robert Cecilia Rogers		
Potential Name Amount Account Name	Potential Name Amount			205/60/R16 Panacea hos Keith Johnso	pitals	UI Widget Dmitry Popov Cecilia Rogers		
Contact Name Potential Owner Account Status		205/60/R16 Ziyc Inc Keith Johnson						

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Predictive Sales

- Lead & Deal Prediction
- Voice Assistant
- . **Anomaly Detection**
- -Zia for Emails
- Best time to Contact
- Recommendation .
- . **Prediction Builder**
- **Competitor Alert**
- . Data Enrichment
- Intelligent Automation .
- Zia-Assignment . Suggestion
- Zia-Workflow Suggestion
- Zia Vision

Ex. Screenshot of Setting up - Data Enrichment Zia wi Enric Desig Com Fax Othe Emai Seco

Leads Enrichment Settings

II fetch contextual information from the wel any, Email and Website	b based on any one of the following details:	
chment Fields	Zoho CRM Fields	
gnation	Title	Ŧ
pany Name	Do not map this field	¥
	Title	¥
ne	First Name	Ŧ
er Phone	Last Name	v
н	Lead Source	Ŧ
ndary Email	Secondary Email	· (
stry type	Industry	¥
site	Website	w.
Customize how	fields are mapped	

Zoho CRM Fields	Value	Update 💿	Enrichment Value
Other Phone			0008004405
Other State			New York
Other Street			150 east 30th street New Yo
Other Zip			10016
Twitter			vamotravel
Phone			9732714833
Other City			New York
Other Country			USA

Zoho CRM - Multi- Language Support

Zoho CRM is available in 28 languages. Here is the list of languages:

- Arabic
- English (US) •
- English (UK) •
- Bulgarian •
- Bahasa Indonesian •
- Chinese (Simplified)
- Chinese (Traditional)
- Croatia (Hrvatski) •
- Czech •
- Dutch (Nederland) •
- Danish •
- French •
- German (Deutsch) •
- Hungarian (Magyar)

Hindi

Indus

Web

- Italiano (Italy)
- Japanese •
- Polish (Polish)
- Portuguese (Brazil)
- Portuguese (Portugal)
- Russian (UK)
- Spanish (Espanol)
- Swedish(Svenska)
- Thai
- Turkish
- Vietnamese
- Korean
- Hebrew

Zoho CRM - Multi- Currencies Support

The multi-currency support in Zoho CRM helps you to handle business and transactions in the global market effortlessly. With the multi-currency feature you can: Estimate the value of a deal in your home currency as well as in your customer's local currency.

← Listir

Customization

One CRM to match everyone's selling style

- Manage multiple businesses with ease
- Validate data before it enters in your CRM

Multiple layouts for multiple processes

Key Function:

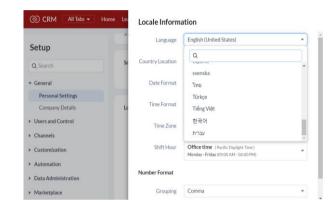
- Page Layouts •
- **Custom Components** •
- Views and Filters
- Subforums •
- **Currencies and Translations**

Customize	your	modules
-----------	------	---------

Modules are designed to help you organize subsets of information. Zoho CRM to serve your sales and marketing needs. For a personalized CRM, add custom modules to parrow

	mou	ules to narrow in	on what matte	rs ior yo	ur maustry.		
isting Inqu	iry	Standard 👻 🛞				Cancel	Save and Close
w Fields 🗸		CREATE					
Single Line	🗀 Multi-Line						Previe
2 Email	& Phone						
Pick List	∜⊟ Multi-Select	Lead Information					
Date	Date/Time	First Name	Single Line		Listing Inquiry Owner	Lookup	
Number	}⊒ Auto-Number	Last Name	Single Line		Secondary Email	Email	
Currency	.00 Decimal	Last Name	Single Line		Secondary Email	Email	
User	^{9_9} Long Integer	Email	Email		Modifed By	Single Line	
Checkbox	% URL	Phone	Phone		Created By	Single Line	
R Lookup	fx Formula						
	Subform	Address Informatio	n				
NEV	VSECTION	Street	Single Line		City	Single Line	
sed Fields > (3	Sucer	Single Line		City	Single Line	
	-	Last Name	Single Line		Zip Code	Single Line	
		Country	Single Line				
		Properties of Intere	est				
		Type of Property	Option 1 -		Planned Date of Visit	Date	
		Site Visit Required	Option 1 ~		Budget	Option 1	

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A layout for every process

Manage sales for multiple products, geographies, or processes, from one CRM system. Page layouts help your sales representatives view and access personalized data and create workflows to function independently. With fields, links, and buttons, you get everything you need to design your own layouts for each new process.

Conditional fields for a simpler experience

When your organization has multiple products, it can be very difficult to show all the specifications for all the features within a product. With Conditional Fields

in Zoho CRM, you can make filling out forms easy. The only fields the user works with are ones they select, resulting in a faster, clutter-free experience for your sales team.

C Insurance Rule @ Leads/Standard When Insurance				
is Vehicle	•	Vehicle Condition	 Show Fields (4) + Trigger an action	Fields Vehicle Number Phone Number Address
is Building	•	<i>.</i>	 Set Mandatory Fields (2) + Trigger an action	Serial Number
Is Family Choose an option	•	Ø	Show Sections (1) + Trigger an action	

Forms within forms for better detail

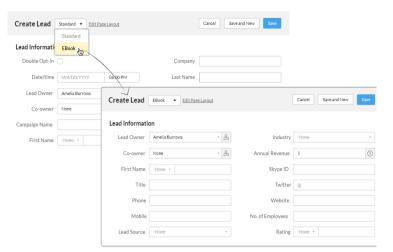
Forms are needed to capture customer information. But a basic form isn't enough, especially when there are many details to be captured. Use Sub forms to associate multiple items to one customer – like adding accessories against the primary sales. You can also add quantity and aggregate functions, so all relevant info stays within a record.

Relate your data for the right context

Data doesn't mean much without context, and most of the time, your CRM data is spread across different modules. Provide more context to your data by linking records across modules. Link

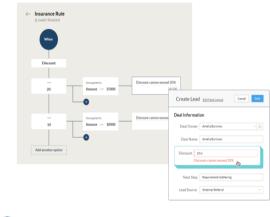
Campaigns with Leads, Contacts with Accounts, and vice-versa

Home Feeds Leads	Accounts Contacts Deals	Prospects Sites	0 0 + B	ss 🕐
🗕 🌒 Mr. Jones Ra	ck - Redeker		Send Email Edit	• • •
Sites				~
SITE NAME	TYPE	AREA (sqft)	PRICE PER SQFT (\$	5
Urban Tees ໃໝ	2 BHK	948	130	
Pacificia Infinity	= Home Feeds Lead	ds Accounts Contacts Deals	Prospects Sites	9 4 + B %
Hazel Pleasanta	🔶 🍈 Urban Tee	es		Edit •••
Eden Enclave	Prospects			
	PROSPECT NAME	PHONE	COMPANY	EMAIL
	Jones Rack	152-756-478	Redeker	jonesrack@redeker.inc
	Carissa Batman	145-908-659	Oh My Goodknits Inc	carissa@Ohmygoodnits.inc
	James Merced	256-750-4510	Kwik Kopy Printing	jamesmerced22@kwikkopy.com
	Cheryl Haroldson	555-555-5555	Edward S Katz	cherylharoldson@edward.com



Ensure the right data enters your CRM The quality of your CRM data directly impacts

Your efficiency. Make sure the right information enters your CRM, with condition checks across multiple criteria that are specific to your industry and need.



Mrs. Lezlie James - Redeker

~	Aud tags			
Lead Own	ner Amelia Burrows 🖧			
Address Info	ormation			
Street	228 Runamuck PI #2808	City	Baltimore	
State	MD	State	21224	
Country	Baltimore City			

Property Name	Type	Area (sqft)	Price per sqft (\$)	Quantity
Tulip Ace	2 BHK	948	130	123,24
Imperia Grand	звнк	1200	127	152,400
Raven Marvel	4 BHK	3730	125	466,250
Castle in the Sky	5 BHK	4080	123	501,840

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Security

We keep your data secure

Out state-of-the-art security systems controls access to your entire organization and secures your data at different levels. With features such as encryption, audit logs, IP restrictions, and two-factor authentication, protect your data and allow only authorized users access to it.

- ✓ Encrypt fields with sensitive data
- ✓ Monitor CRM activities with Audit logs
- ✓ Restrict access from unauthorized IP address

• Encryption to protect sensitive data Zoho CRM uses one of the strong and robust methods - AES - to encrypt and decrypt your sensitive data. Apart from protecting data during transit, Zoho CRM secures data stored in servers using the AES-256 protocol and prevents data from being leaked or lost.

• **Meeting HIPAA guidelines with Zoho CRM** As a Business Associate, Zoho CRM helps its customers stay HIPAA compliant by having necessary safeguards in place to ensure the integrity of the protected health information. Zoho is not directly involved in collecting the Electronic Protected Health Information (ePHI) from the data subjects.

Empowering businesses to be GDPR ready Zoho

CRM is fully equipped for GDPR compliance as a data

processor. Across data collection, storage and processing, Zoho CRM offers many options designed to help businesses safeguard customer data and meet the security and privacy standards set in GDPR.

• **Vaults to store important information** Secure your most important, private business data by storing it in vaults. Prevent hackers and other users from gaining access to your vault contents, and ensure that your information is safe.

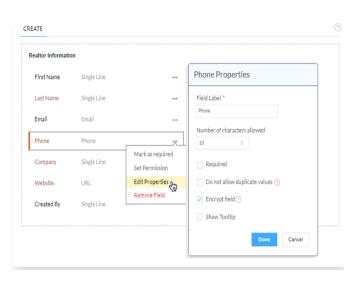
• **Keep your data close** Decide where you want your data to be hosted. Select from state-of-the-art data centers in the US and EU. Each center has multiple levels of access restrictions, including video monitoring, security cameras, biometric limited access systems, and bullet resistant walls to protect your data from any physical attacks.

• **Track user activity with audit logs** Monitor your sales team's activities with audit logs, so you can track who did what and when. For example, all actions done by your users with respect to record deletion and modifications will be audited so that you take proactive decisions.

• **Prevent unauthorized access with IP restrictions** Use our IP restrictions to limit unauthorized users by only allowing sign-in from designated IP addresses, like your corporate network. This means that even if your users have their credentials stolen, your CRM will still be protected from unauthorized access.

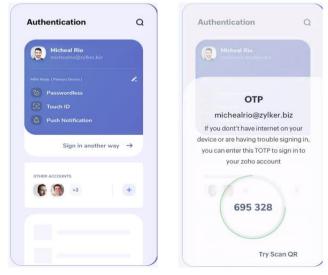
• **Tighten security with two-factor authentication** Provide an additional layer of security for your account with two-factor authentication in Zoho CRM. In addition to a username and password, an authentication token is required to log into your account.

• **Regular data backups** All your data is backed up in real time across multiple servers. In the event of hardware failure or natural disaster, your data stays secure.



Alternate Verification

Having an internet problem? Not receiving push notifications? Don't worry, OneAuth's Alternate Verification lets you switch your MFA mode as Scan QR code or Offline OTPs.

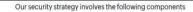






Security

Zoho provides Software as a Service(SaaS) products to millions of users worldwide to solve their business problems. Security is a key component in our offerings, and is reflected in our people, process, and products. This page covers topics like data security, operational security, and physical security to explain how we offer security to our customers.



Organizational security

Physical security

Data security

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Infrastructure security
Responsible disclosures

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Vendor management

Operational security

Incident management

Identity and access control 🛛 😔 Customer controls for security







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