



Data Administration

MODULE 9

ZOHO CRM

Course for Administrators



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Lesson A:

Common Operations

Lesson Objectives

In this lesson, you will:

- Learn about common operations in CRM.
- Understand the types of common operations in CRM.

Common Operations

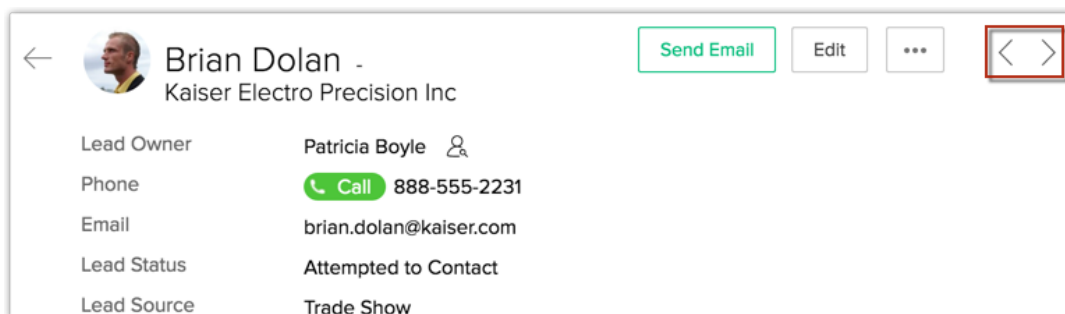
As a Zoho CRM administrator, you may need to help your sales team members transfer data between Zoho CRM and external applications and vice versa. Apart from this, you can perform different types of actions in Zoho CRM records like create records, search records using different filters, import records, capture records from website, and so on. We will take a look at each of these actions in detail in this module.

Record Navigation

Navigation primarily means the process of moving back and forth within the records. In Zoho CRM, navigation allows easy movement between the records; it provides options to choose the number of records to be displayed in one page and saves time in accessing them. The two navigational options that are available in Zoho CRM are:

- Page-level navigation
- Record-level navigation

Page-level Navigation: With page-level navigation you can easily move between the previous or next pages of a module to view the list of records. Also, based on your Zoho CRM edition you can select the number of records to be displayed in the module's home page.



Record-level Navigation: With record-level navigation you can move from one record to the previous or next consecutive record(s). You can also view the first or last record entry.

		LEAD NAME	COMPANY
<input type="checkbox"/>		George Faulkner	Kaiser Electro Precision Inc
<input type="checkbox"/>	<input checked="" type="checkbox"/> JUN 15	Brian Dolan	Kaiser Electro Precision Inc
<input type="checkbox"/>	<input checked="" type="checkbox"/> JUN 7	Aris Khalil	International Rectifier Corp
<input type="checkbox"/>	<input checked="" type="checkbox"/> JUN 7	Ray Stantz	Ray's Occult
<input type="checkbox"/>	<input checked="" type="checkbox"/> JUN 7	Doug Kajiwara	W M C Mortgage Corporation
<input type="checkbox"/>	<input checked="" type="checkbox"/> MAY 11	Roger Hensley	Varian Inc
<input type="checkbox"/>	<input checked="" type="checkbox"/> JUN 9	Louise Culver	Community Memorial Hospital Inc
<input type="checkbox"/>	<input checked="" type="checkbox"/> JUN 9	Pete Petit	Matria Healthcare Inc
<input type="checkbox"/>	<input checked="" type="checkbox"/> JUN 9	Joe Hackett	International Rectifier Corp
<input type="checkbox"/>	<input checked="" type="checkbox"/> JUN 9	Ronald Zelman	City of Hope National Medical Ctr

Total Count: ###

100 Records Per Page < 1 to 49 >

Search Records

When you have a seemingly-endless list of records in a CRM module, searching for a specific record can take up all your time. We understand this, so Zoho CRM gives you three options for searching records:

1. **Search records by alphabet:** Choose an alphabet and CRM will list out all the records that begin with the defined alphabet.
2. **Search records by information:** Search a record by selecting any information like calls, tasks, events, modules, etc.
3. **Search records by criteria using advanced filters:** Mention specific details like company, email, or country in the advanced filter as criteria to search the records.

Create Records

You can capture information about leads, deals, quotes, and more from various sources and add them as records in the modules. You can add these records in

your CRM account in more than one way; you can either add them manually, import them to CRM, or capture the data from the web forms.

I. **Create records manually:** If you have a limited number of records, you can add them manually in the CRM module. You can create records individually by the following methods:

- Filling in details in the record creation form.
- Duplicating the record with few changes in the existing details.

You can create leads individually by using the following:

- Filling in details in the lead creation form.
- Cloning the lead with few changes in the existing record.

II. **Import Records:** It's very possible that you are using different systems to gather important business related data. In this case, it will be important to import the records directly to your CRM system to avoid any kind of data mismatch. For example, you may be purchasing records from external sources, capturing product requests through Web sites, getting records from a different business unit within the organization where there is a chance of cross-selling products, or migrating data from your old system to Zoho CRM. In all these cases, importing records enhance your productivity. Zoho CRM provides you with two options:

- Importing data to individual modules in Zoho CRM: Individual files can be imported, one at a time, to a specific module.
- Migrating data from other accounts to Zoho CRM: The migration wizard can be used while migrating from another CRM and transferring huge amounts of data to Zoho CRM.

Learn more on importing data later in this module.

III. **Capture Records Using Web Forms:** With web forms you can simplify the process of capturing visitors' or users' information from your company's website into your CRM system. This automates the data import from websites into Zoho CRM. Web forms are supported for the Leads, Contacts, Cases, and other Custom modules in your account. You can use

a web form to conduct surveys, receive feedback, generate online sales, respond to customers' queries, and so on. The following checklist will help you know what you'll need before setting up a web form:

- **Default Email Template:** You need to create a default email template that will be automatically sent to the website visitors upon submission of their information.
- **Create Assignment Rule:** This applies only if you want to assign the incoming records to specific CRM users or assign them based on a round-robin method. If you do not want to use an assignment rule, all the incoming records will be assigned to the administrator.
- **Configure the Web Form:** Configure the web form as required.
- **Customize Fields:** Add fields that you need in the web form.
- **Rehearse the Web Form:** Test the web form before publishing it on your website.

(Note: When the email is sent to users within the organization, it is sent as a notification from the email address notifications@zohocrm.com.)

Different Types of Actions in Record

There are several other activities in a record that you can perform as a Zoho CRM administrator, such as printing records, restoring deleted records, merging duplicate records, navigating records, mass transfer, and so on. In this module, we will look into these actions in depth.

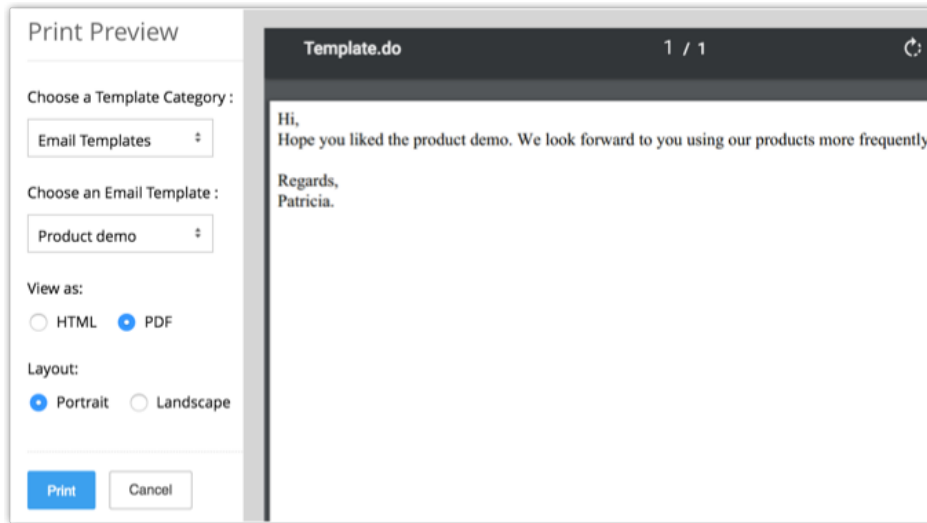
Change Record's Owner: With the change record owner option, you can transfer the ownership of a record to another user. In addition, you can also transfer the ownership of the open activities, open contacts, or open deals that are associated with the record and owned by the record's owner. We have listed down a few points that you must note while changing the ownership of a record:

- **Accounts:** While changing a record's ownership in the Accounts module, you can choose to either change to the selected owner or retain the old owner for the open activities, open deals, or contacts associated with the record.

- **Contacts:** While changing a record's ownership in the Contacts module, you can either choose to change the ownership of the open activities or open deals associated with the record or retain the ownership as it is.
- **Other Modules (except the Activities module):** If the record's ownership is changed you can also choose to change the owner of the associated open activities.
- **Changing record's owner in automation rules:** If you have configured an automation rule that will be triggered either by editing a record or by a field update, the trigger will be applied to the parent and the first-level child only. For instance, an account has an open deal and this deal is associated with a contact, so the rule (if any) will be triggered only for the account and the open deal. It will not be applied to the deal's contact. Please note that here automation rules are workflow rules, approval processes, blueprints, and scoring rules, and that automation execution is enabled only for Standard edition users.
- **Changing owner when there is an association with the Contact:** If an activity is created for a deal or account and is also associated with a contact, then the ownership of the activity can be changed when the ownership of the deal or account, or that of a contact, is changed.
- **Changing Owner from Deleted or Deactivated Users:** When the ownership of the record owned by a deleted or deactivated user is changed, the associated open activities, open deals, or contacts are automatically transferred to the new owner. There will be no option to retain the ownership of the associated records.
- **Changing Owner in Parent-Child Relationship:** When the ownership of the parent record is changed the ownership of the associated first-level and second-level child record will also change. However, the Change Owner notification will not be shown for the second-level child record. For instance, Zylker Corp (parent account) has an open deal (first-level child record) which also has a task (second-level child record). On changing the ownership of the deal, the task's owner will change as well.

Print Records: You can view the record details in printable form and print them using the browser's print function. You can also print the list of records from the module's home page. While printing the record details, you can choose the

template category from the email template, mail merge template, or inventory template in which you want to print the records.



Delete Records: Occasionally you might want to remove some of the unnecessary records from Zoho CRM, for better management of your data. You may also consider removing records that are not useful for future reference. The deleted records are temporarily stored in the recycle bin for 60 days from the date of deletion, after which they are permanently deleted.

Restore Deleted Records: Records that are deleted individually or mass deleted are stored in the recycle bin for a temporary period of 60 days. You can restore the records within that period.


Mass Actions in Records

There are several actions that you can perform in bulk. In CRM such bulk actions are called mass actions. Below are the mass actions that you can perform:

Mass Delete Records: Using the mass delete option you can delete records in bulk. You need to have the Mass Delete profile permission for the individual modules to use this feature.

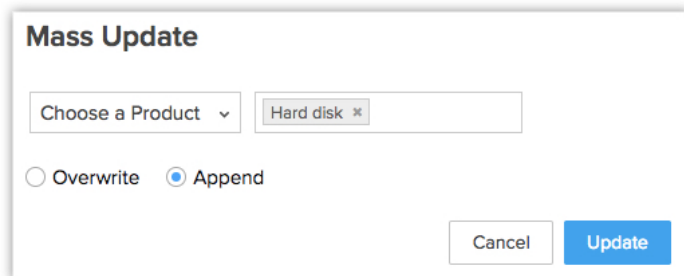
Mass Transfer Records: This feature allows you to transfer records from one user to another. You can select the open activities that should be transferred to the new owner. You need to have the Mass Transfer profile permission for the individual modules to use this feature.

To transfer mass records

1. Click the [Module] **tab** (e.g., Leads, Accounts, Contacts, etc.).
2. In the [Module] Home page, click [Module] Tools > Mass Transfer [Module].
3. In the **Mass Transfer [Module]** page, do the following:
 - a. In the **Select New Owner** section, click  to select the owner's name for the **Transfer From** and **Transfer To** fields.
 - b. Specify the criteria.
 - c. Click **Search**.
 - d. Under **Matching [records]**, select the check box(es).
 - e. Click **Transfer**.

Mass Update Records: If you have the Mass Update profile permission for individual modules, then you can update the records in those modules in bulk. However, you cannot update the Text Area and Lookup fields using the mass update. Also, only when you are mass-updating the multi-select fields can you choose to either overwrite or append the values. Overwrite is a default option in CRM that replaces the previous value with the new one.

The Append option allows you to retain the previous value and also add the new value.



Mass Update

Choose a Product ▾ Hard disk ✕

Overwrite Append

Cancel Update

To update mass records

1. Click the [Module] **tab** (e.g., Leads, Accounts, Contacts, etc.).
2. In the [Module] Home page, click [Module] Tools > Mass Update [Module].
3. In the **Mass Update [Module]** page, do the following:
 - a. Specify the criteria.
 - b. Click **Search**.

The page displays the list of matching records.

- c. Under *Matching [records]*, select the check box(es), and then click **Mass Update**.
- d. In the *Select Field to Update* page, select the field to be updated.
- e. Enter the corresponding data in the box.

4. Click **Save**.

Merge Duplicate Records: Over time, you may accumulate duplicate records. To better organize your records, you can search for duplicates and merge them.

There are two features to merge duplicate records:

- **Find and Merge Duplicate Records:** Specify criteria to find duplicate records. There are six fields in each module in which you can specify the criteria.
- **De-duplicate Records:** Search all duplicate records in a module based on a selected field's value. You can choose any one of the four fields that are available based on the selected module.

Use Last Activity Time: There are several activities like adding a note, closing a task, sending emails, and so on that are associated with the records. The last updated time of such activities is captured in each record as Last Update: Time (only in the Leads, Accounts, Contacts, and Deals modules). The information in this field can be used in the criteria for List View and Reports, to filter out records that did not show any activity for a specific period or those records that had recent activities. You must remember that the Last Activity Time or the Last Update time are the same.

Activities and updates that will be recorded as the Last Activity time:

- Editing fields in a record
- Adding and updating activities, e.g. Tasks, Events, or Calls
- Sending emails to leads and contacts
- Adding and editing notes
- Adding deals and contacts under an account
- Changing the owner of the record
- Adding or deleting a record
- (This does not include deleting a record associated with a parent record.)
- Closing a task

- (This does not apply to events, as they are automatically moved under Closed Activities after the end date/time.)
- Deleting and restoring records (individually or in bulk)
Activities and updates that will NOT be recorded as the Last Activity time:
- Mass operations like Mass Update, Mass Transfer, etc.
- (except for Mass Delete option)
- Editing contacts or potentials under an account will not be listed under the account
- Deleting related lists under a record

Different Types of Module Views

Module views give you ways to sort, categorize, and view your records. they help you prioritize your tasks by viewing only those records that you need the most. In Zoho CRM, you can choose to view the records in three different ways: **List view**, **Kanban view**, and **Canvas view**. Let us discuss each of these views in detail in this section.

List View

In the list view the records are grouped under a defined set of criteria. List views are categorized under Created By Me and Shared With Me. You can also mark list views that you often use as Favorites and those will be listed first in the List View drop-down. There are two types of list views available in Zoho CRM:

- **Standard List Views:** These are pre-defined sets of list views that are ready to be used by all the users in the organization. Depending on your requirements, you can modify the standard views and sort the order of the columns in the list. However, the standard list views cannot be deleted. You can select a list view from the module's home page by clicking on the View icon. Some standard list views are: All Records, My Records, Recently Created Records, Recently Modified Records, Recently Viewed Records, etc.
- **Custom List Views:** You can define criteria and create your own list view, and the records will be filtered based on the criteria you set. You can

modify, delete, and also sort the order of the columns in a custom list view. The list views created by the user are listed under Created By Me.

Actions in a list view

Several actions like selecting criteria, editing criteria patterns, selecting required columns, and more can be performed right within a module's list view. Let's take a detailed look at each of them.

Specifying Criteria: For every field type in CRM you can define different types of criteria. The field types can be categorized as below:

- **String Fields:** First Name, Mobile, Email, Website, Industry, Title, Created By, Skype ID, Phone, Salutation, Company, and State.
- **Numeric Fields:** Age, My Percentage, Age in Days, My Currency, and My Decimal.
- **Date and DateTime Fields:** Created Time, Modified Time, My Date, and My DateTime
- **Boolean Fields:** Email Opt Out, Active, and My DateTime.

The table below lists the criteria for the common field types:

Field Type	Criteria
String Fields	<ul style="list-style-type: none"> • is • isn't • is before • is after • between • not between • Today • Tomorrow • Tomorrow Onwards • Yesterday • Till Yesterday • Last Month • Current Month

	<ul style="list-style-type: none"> • Next Month • Last Week • Current Week • Next Week • is empty • is not empty • Age in Days • Due in Days
Numeric Fields	<ul style="list-style-type: none"> • = • != • < • <= • > • >= • is empty • is not empty
Date & DateTime fields	Same as the string fields
Boolean fields	<ul style="list-style-type: none"> • True • False

Selecting List View Columns: From the *Choose Columns* section in the *Available Columns* list box, you can select the columns that should be displayed in the List View. After selecting the columns from the *Selected Columns* list box, you can change the order or remove the unnecessary columns.

Setting up Permissions in the List View: From the *Accessibility Details* section, you can define a user's accessibility to view the custom lists. You can select from the following available options:

- All users are allowed to view this custom view
- Show this custom view only to me
- Allow the following users to view this custom view

Select All Records in a Custom List View: If you want, you can select all the records that belong to a particular custom view in one shot. This can be particularly beneficial in cases when you want a specific update to take place across the records. For example, if you want to change the owner of all the records in a list view, instead of selecting each record individually, you can simply click the Select All [Records] in this View link and click Change owner. Similarly, you can perform other actions like mass update or delete.

Edit Criteria Patterns: The Criteria Pattern Editor in the custom list views will help you to define advanced filters using simple logical operations like "and/or." You can specify a maximum of 25 criteria for a list view. The following characters can be used in the criteria pattern editor:

- Round brackets: ()
- and / or operators
- Criteria Row Number

To edit criteria patterns

1. Click the desired **Module** tab (e.g., Leads, Accounts, Contacts, etc.).
2. Select a **List View** from the drop-down list.
3. Click **Edit**.
4. In *Edit View* page, review your existing criteria and click the **Change Pattern** link.
5. In *Pattern Editor* box, modify filters and click the **Save** link.
6. Save the modified custom view.

Use Last Activity Time in Criteria: There are various activities associated with records, such as adding a note, closing a task, sending emails, etc. The last updated time of such activities is captured in each record as Last Update: Time (only in the Leads, Accounts, Contacts, and Deals modules). The information in this field can be used in the List View criteria to filter out records that had no activity for a specific period or those records that had recent activities.

Clone Custom List View: The custom views that you create can be duplicated and a similar list view can be created. Please note that the default views cannot be cloned or deleted.

Edit Standard List View: If you want to add or remove columns in the list view, you can edit the standard list views that are provided by default in Zoho CRM. Please note that you cannot edit the criteria or rename these pre-defined list views.

Sort Records in List View: Records in the list view can be sorted in ascending or descending order.

Kanban View

Kanban view is a card-based view that displays the data in an organized manner for better comprehension. For example, you can sort the leads based on their status or categorize the sales depending on different stages. This sort of information gives better insights about potential bottlenecks and lets you fix them effectively.

For example, take a look at the image below. The leads are segregated based upon the lead status along with their probable revenues in both list view and kanban view. As you can see, kanban view gives you a clear idea of the number of leads at different stages and the revenue stack for each status, thereby presenting your CRM data in a more productive manner.

LEAD NAME	LEAD SOURCE	ANNUAL REVENUE	INDUSTRY	LEAD STATUS
Lezlie Craghead	Trade Show	\$850,000.00	Storage Equipment	Attempted to Contact
Carrisa Meyer	Advertisement	\$200,000.00	Data/Telecom OEM	Contact in Future
Tresa Sweely	Seminar Partner	\$190,000.00	Storage Equipment	Contacted
Felix Hirpara	Online Store	\$230,000.00	Non-management ISV	Attempted to Contact

ATTEMPTED TO CONTACT	CONTACT IN FUTURE	CONTACTED
\$ 1,180,000.00	\$ 670,000.00	\$ 1,020,000.00
Craghead Storage Equipment Amelia \$850,000.00	Carrisa Meyer Data/Telecom OEM Amelia \$200,000.00	Sweely Storage Equipment Amelia \$190,000.00
Hirpara Non-management ISV Amelia \$230,000.00	Kayleigh Lace ✓ Email Opt Out Optical Networking Amelia \$270,000.00	Haroldson Service Provider Amelia \$830,000.00

In Zoho CRM, you can create kanban views for all the modules except Activities, Visits and Finances. There are two types of kanban views available: Pre-defined and Customizable.

A) **Pre-defined:** Pre-defined kanban views are available for Activities, Social, Visits, and Deals modules and the SalesInbox. Below is the CRM view for an Activities module that is categorized based on Customers, Open Deals, Leads/Contacts, and Others.

B) **Customizable:** You can create a customized kanban view for any module. To create a kanban view you will need to enter the following details:

- **Kanban View Name:** You can enter any name for the kanban view created, for example "Lead Details."
- **Categorize By:** Select the category in which you want to segregate the data, for example "Lead Status".
- **Aggregate By -** Select a currency or number field for which you want the aggregated value, for example "Expected revenue/Number of user licenses." A summed-up value for each category will be displayed.
- **Select Fields:** Select the fields that you want to view within each record.

Canvas View

Canvas View lets you sculpt an exclusively personalized view of your CRM records. You can customize the way the records are displayed depending on your business needs. You can use canvas to add record images for better identification, use custom buttons for representing the fields, use specific font style or size, change the alignment of field types, group similar field types, and much more. In other words, you can completely refurbish the way your CRM records are displayed.

Let's take a real life scenario and understand how you can use a canvas view. Suppose you run a travel and tourism business and your CRM account comprises modules like Recreation, Sports and Adventure, Entertainment, and Holiday Packages. Your customers log in to your website and select a tour package, choose the best-suited itinerary, and confirm booking. Then a customer care executive calls the customer to confirm the plan and discuss travel details.

When the customer visits the Recreation and Holiday Package modules, they would surely expect an inviting display of options. You can create a captivating display by choosing the canvas view, where you can add images of retreat spots and adventure sports, align the description of the locale right below the image, and choose a font color that accentuates the image. You can also highlight the itinerary details to grab customers' attention and use some custom buttons to portray various travel modes.

Designing and building a canvas view

In CRM you can select from an array of pre-designed templates and customize them according to your requirements, or build a template from scratch using the design tools available in canvas. In the steps below we will discuss in detail how you can create a canvas view.

Step 1. Create a Canvas View

You can create canvas view for both standard and custom modules, except for the Activities module.

Step 2. Choose a design template or build your own canvas view

Once you choose to create a canvas view for a module you can do either of the following for creating a design template:

- **Choose a template:** Choose any template from an array of pre-defined designs. The templates include a range of categories like People, Organization, Deals, Product, Help Desk, Real Estate, Automobile, and so on.
- **Build your own view:** This option lets you build your canvas view from scratch. You can use additional customization options available in the layout editor for creating a personalized view of the module.

Step 3. Preview the template

Once the template is designed, you can preview it. If required, you can make any changes before saving.

Step 4. Share the canvas view

You can choose to share the canvas view that you have created. You can share the view either with all the CRM users or choose a selected list of users. The CRM users will be filtered based on roles, groups, users, or roles and subordinates.

Field Mapping for Lead Conversion

When there is a chance for further negotiations with a lead, it can be converted into an account, contact, and finally a deal. In short, once the lead status has reached a certain stage, it can be qualified as a deal. On conversion, a lead is converted to an account and contact and then, if appropriate, a deal can be created upon conversion. You can map the lead fields with those of the account, contact, and deals so that the details are transferred to the appropriate fields.

During conversion, if there are records that match the email address of the lead, then the lead details will be merged with the existing record.

Any tags associated with the leads can be carried over to accounts, contacts, and deals upon individual as well as mass conversion of leads.

When converting a lead to a deal, first a new account and contact are created with the relevant lead data, and then a new deal is created. The following table provides descriptions of the various fields converted to an account, contact, and deal during lead conversion. If you have custom fields, you can map them too.

Lead Field	Converted To
Salutation	Contact: Salutation
First Name	Contact Name
Last Name	Contact Name
Company	Account: Name Contact : Name
Designation	Contact: Title
Lead Source	Deal: Lead Source Contact: Lead Source
Industry	Account: Industry
Annual Revenue	Account: Annual Revenue
Assigned To	Account, Contact, Deal: Assigned To

Phone	Account: Phone Contact: Phone
Mobile	Contact: Mobile
Fax	Account: Fax Contact: Fax
Email	Contact: Email
Skype ID	Contact: Skype ID
Web site	Account: Web site
Lead Status	User should specify the Deal Stage while converting the lead.
Rating	Deal: Rating
No of Employees	Account: No. of Employees
Email Opt Out	Contact: Email Opt Out
Street	Account: Street Contact: Street

City	Account: City Contact: City
State	Account: State Contact: State
Postal Code	Account: Postal Code Contact: Postal Code
Country	Account: Country Contact: Country
Custom Fields	Users can map their own custom field.

Mapping Fields

When a lead is converted into an account, contact, and deal, the lead's field values are transferred to the mapped account, contact, and deal fields. Only when the fields are accurately mapped with those of the corresponding modules will the data be transferred properly.

By default, the standard fields are mapped with the corresponding fields of the other modules (Accounts, Contacts, and Deals). With the lead conversion mapping tool, you can easily map other fields that you create. Please note that you need to map a field with a similar type of field as well as field length only.

For example,

- A text field should be mapped only with a text field.
- A picklist field should be mapped only with a similar type of picklist field.

- A single-line field of 255 characters can be mapped only with another text field of 255 characters or greater.

Important Points:

During lead conversion, if you choose to create a deal, the notes added to the lead will automatically be moved to the corresponding deal. A copy of the notes will also be shown in the relevant account and contact. If you do not create a deal during lead conversion, then the notes will be available only in the corresponding contact.

When converting a lead, you have the choice of selecting where you want its attachments to be moved. They can be moved either to a contact or to a deal that is created. If a deal is not being created, then the attachments will be automatically moved to the contact.

To map lead fields with other modules

1. Go to Setup > Customization > Modules and Fields.
2. From the list of modules, select the **Leads** module.
3. Click the Module Settings icon > Lead Conversion Mapping.
4. In the *Map Fields for Leads Conversion* page, the fields are listed under the *Lead Fields* column. Fields under corresponding modules (Accounts, Contacts and Deals) are also present.

Map fields based on page layouts

If you have created multiple layouts for a module, you can enable conversion of leads across layouts. For this, you must map the fields of one layout with the corresponding layouts of another module.

For example, if you have created a layout called Mobile Service in the Leads module, all the fields from the Mobile Service layout in Leads can be mapped with the Mobile Service layouts of Contacts, Accounts, and/or Deals, as appropriate.

To map fields based on page layouts

1. Go to Setup > Customization > Modules.
2. From the list of modules, select the **Leads** module.
3. Click the Module Settings icon > Lead Conversion Mapping.
4. In the *Map Fields for Leads Conversion* page, choose the desired layout under the **Leads** module.
By default, the fields of the Standard layout of Leads, Contacts, Accounts, and Deals are displayed
5. Choose the corresponding layout under **Contacts/Accounts/Deals** as required.
6. For each field under Leads, map the corresponding field under Contacts/Accounts/Deals from the drop-down lists.
7. Click **Save**.

Important Points

- By default, the fields from Leads are mapped to the Standard layout of other modules.
- Upon account downgrade, layout-based conversion will not take place as the layouts will not exist. However, immediately after downgrade the mapping settings will remain intact until you edit the settings.
- When you attempt to deactivate/delete a layout that has been associated in lead conversion mapping, you will be prompted to remove the layout from the mapping settings before you can deactivate/delete it.
- When page layouts have been enabled, if you select the Also Create for Contacts/Accounts/Deals checkbox while creating a custom field for Leads, the auto-mapping of custom fields will not take place.
- For every field under Leads, the corresponding fields under Accounts/Contacts/Deals will not be displayed in the drop-down list for mapping, if their field types and field length do not match.

Recycle Bin

All the records and files that are deleted from the Zoho CRM account are stored in the recycle bin. You can restore the records from the recycle bin within 60 days, after which they will be permanently deleted from the database. You can also manually delete the records from the recycle bin before the default deletion period.

Please note that the records will be visible based on your organization's role hierarchy and your permission to view the records.

Lesson B:

Import Data

Lesson Objectives

In this lesson, you will:

- Learn how to import data from different sources into CRM.
- Understand how to map fields from the import file to those in Zoho CRM.

Importing Data

Data can be gathered from various sources such as purchasing a record database, collecting from trade shows and campaigns, and so on. Importing records from such external sources to Zoho CRM is one of the critical activities during the lead creation process. For that reason, importing should be easy and should help you maintain clean data without duplicates.

You can import your data using either of the two options below:

Importing data to individual modules: Individual files can be imported, one at a time, to a specific module.

Migrating data from other accounts to Zoho CRM: The Data Migration Wizard helps you to migrate data from other CRM systems to Zoho CRM. The wizard enables you to attach the CSV file of the module to be migrated and set the supported Date and Time format in the import file to avoid values being ignored during the migration. You can also ask Zoho CRM to notify you when the import is complete by selecting the Send Email Notification option. After the necessary details are specified, you will need to map all the mandatory fields in the CSV file with those in Zoho CRM.

Points to Remember

- You cannot import activities, reports, invoices, quotes, purchase orders, forecasts, sales orders, or templates using the import data option.
- You can import events in ICS format from the Calendar.
- You can import a maximum of 5,000 records/batch in any of the supported formats. Records numbering more than 5,000 can be imported in CSV format only.

Import Checklist

Before importing data from external sources into the CRM account, you must follow the guidelines to ensure proper transfer of data.

1. Permission

To initiate data import, you must have the access and privilege to import data. If you do not have the requisite privilege, the Import link will be hidden in your user interface.

2. File Format

The file formats that are supported in Zoho CRM are: Excel (XLS, XLSX), Comma Separated Value (CSV), and Business Card or vCard Format (VCF). All file attachments should be separated from the data.

Unexpected errors may occur if the XLS/XLSX files contain any special controls such as combo filters or images embedded in them.

3. Allowed Characters

Any data for the file to be imported should not contain the following characters:

- Double quotation marks (") – use only as a field delimiter
- Vertical bar (|)
- Angle brackets (<>)

4. Mandatory Fields

The required (mandatory) fields must contain a value. Make sure you do not leave any mandatory fields blank in the import file. For instance, when you are importing account information, each account record must include an Account Name. Also, note that you cannot proceed to the next step without mapping the mandatory fields.

5. Check Box Data

Make sure that the data you plan to import from Boolean or check box fields contain values that will properly convert during the import process.

Imported data from Boolean and check box fields are converted as follows:

- If check box is selected: True or 1

- If check box is not selected: False or 0

6. Drop-down List

All data values displayed in the drop-down lists must exist in the corresponding Zoho CRM fields.

For instance, if you plan to import account information that contains a value for the industry type drop-down list, before you import the account information, make sure all the industry values in the source file already appear in the drop-down list. If the values do not exist, you must either change the values in the source file to match the existing values in Zoho CRM, or have your administrator add the new values.

* If values are not added in the drop-down list, data can still be imported. After importing, if you change the value for the field, you cannot change it back to the old one as it will not be available in the list.

7. Field Names

Make sure the first row of data (records) in the source file contains the column headings or field names rather than the actual data values. These heading field name values help identify the data when you map the new data to the existing fields in Zoho CRM.

8. Blank rows in the import file

More than 10 blank rows in the file might indicate the end of the file. Data after the blank rows will be ignored during import. Make sure not to leave blank rows in between rows of data.

9. File Size

Make sure the file size does not exceed the following limits according to your edition of Zoho CRM:

CSV files

- Enterprise: 25 MB

- Professional and Standard: 10 MB
- Free: 5 MB

VCF files:

- 5 MB for all editions

The modules along with their Zoho-defined mandatory fields are described in the table below. Please make sure to map these fields when you import. There may be other mandatory fields in each module too, but you can always customize and mark the fields as non-mandatory if necessary.

Modules	Mandatory Fields	Modules	Mandatory Fields
Leads	Last Name	Cases	Case Origin Subject Status
Accounts	Account Name	Solutions	Solution Title
Contacts	Last Name	Price Books	Price Book Name
Deals	Deal Name Stage Closing Date	Products	Product Name
Campaigns	Campaign Name	Vendors	Vendor Name

To import data

1. Select a module in your CRM account.
2. In the [Module] Home page, click **Import [Records]**.
3. Browse the import file and upload it.
The character encoding will be automatically detected.
4. Change the character encoding from the drop-down list, if required, and click **Next**.
5. Select the **Layout** into which you want to import the records.
If you do not have a layout created, the records will be imported in the standard layout and the option to choose a layout will not be available.
6. Select one of the following options:
 - **Add as new [Records]**: Choose this option to import all the records in the import file to Zoho CRM.
Select **Record ID** or **Email/Record Name** from the drop-down list. In order to avoid data duplication, you have this additional option to skip records from the file that match existing records in Zoho CRM. These can be filtered based on record ID, name, or email address, as per the module.

Choose Layout

Select layout to import leads * Standard ▾

What do you want to do with the records in the file?

Add as new Leads Update existing Leads only Both

Skip existing leads based on --None-- ▾

Cancel Next

- **Update existing [Records] only**: Choose this option to make changes only to the existing records.
Select **Record ID** or **Email/Record Name** from the drop-down list to find existing records that match those in the import file. This option helps

you filter existing records that need to be updated. Additionally, you can choose to skip updating empty values in the records. For example: Say your CRM record has a value, Hospitality, for the field Industry and the import file does not have any value for the same field. When you import the data from the file and choose **Skip updating empty values**, then the empty value will not be overwritten and the Industry field value will be left unchanged. This will avoid the chance of any data loss.

- **Both:** Choose this option to add new records as well as update the changes in the existing records.
Select **Record ID** or **Email/Record Name** from the drop-down list to find existing records that match those in the import file. You have this option to filter existing records that need to be updated. You can also choose to skip updating empty values from your import file to the records in Zoho CRM.

7. Click **Next**.

8. Map fields from the import file to those in Zoho CRM.

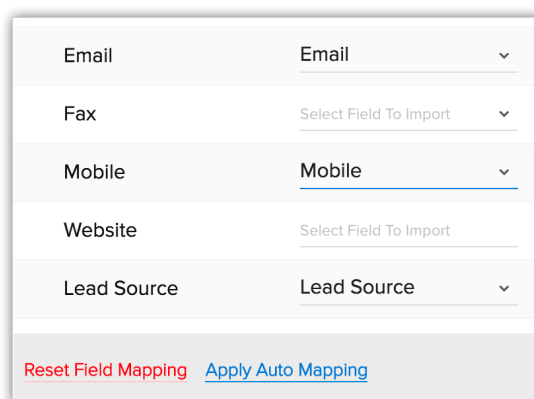
FIELDS IN FILE	FIELDS IN ZOHO CRM	SAMPLE DATA FROM FILE	
Deal Owner	Select Field To Import	Amelia Burrows	Amelia Burrows
Amount	Select Field To Import	4000	5000
Deal Name	Select Field To Import	40 widgets	50 widgets
Closing Date	Select Field To Import	10/27/16	10/28/16
Account Name	Select Field To Import	H I D Corporation	Treble Notes Inc
Stage	Select Field To Import	Closed Lost	Proposal/Price Quote
Type	Select Field To Import	New Business	New Business

The data from the first three columns in the import file will be available.

Based on these data, formats for certain fields will be added. This format can be edited, if required.

- a. Click **Create New Fields** if you need custom fields that are not already available in your CRM account.
- b. Click **Mapped** and **Unmapped** to view the columns that are mapped and not mapped respectively with the fields in Zoho CRM.
- c. Click the **Reset Field Mapping** link to start mapping from scratch. Any the mapping you have done so far will be removed and you can start over.
- d. Click the **Apply Auto Mapping** link to let CRM map the import columns with matching fields.

The system will identify columns that match the CRM fields and map them automatically.



Email	Email
Fax	Select Field To Import
Mobile	Mobile
Website	Select Field To Import
Lead Source	Lead Source

[Reset Field Mapping](#) [Apply Auto Mapping](#)

9. Click **Next**.

10. Choose one of the following to **assign the lead source**:

This option is available only for the Leads module, and only if you have mapped the Lead Source field. If the field is not mapped, you will get to choose one Zoho CRM lead source value from the drop-down list.

- **From options:** Values from the Lead Source picklist field are listed. You can select one value and it will be applied to all the records that are imported.
- **Field mapping:** Your import file may have a column that mentions the lead source. You can map that column with the CRM field and choose this option to use the values from the import file as the source.

Assign Lead Source

From Options Web Download
 Field mapping - *Lead Source*

Assign Owner

Users
 Assignment Rules

Assign owner from users Martha Hills

Assign Tasks

Add a task for new leads Next follow up [Create Workflow Task](#)

Add Tags

Add Tags for the new leads Tradeshaw Leads

11. Choose one of the following to **assign an owner**:

- **User:** Choose a user from the drop-down list to assign a single owner for all the records that you import.
- **Assignment Rules:** Choose an assignment rule from the drop-down list to assign users based on the rule, or create a new assignment rule.
- **File mapping:** This option will be available only when the [Record] Owner field is mapped to a column from the file. You can map either using Record ID or Email. The import file should have a column that contains the exact email address(es) of the user(s) to whom you want to assign each record. Only then will the records automatically be assigned to the respective users while importing.

12. Choose a task from the drop-down list or create a workflow task to **assign tasks**.

The existing workflow tasks will be available in the list.

13. Add relevant **tags**, if applicable, from the list of existing tags for the module.

The chosen tag will be added to all of the records that are imported.

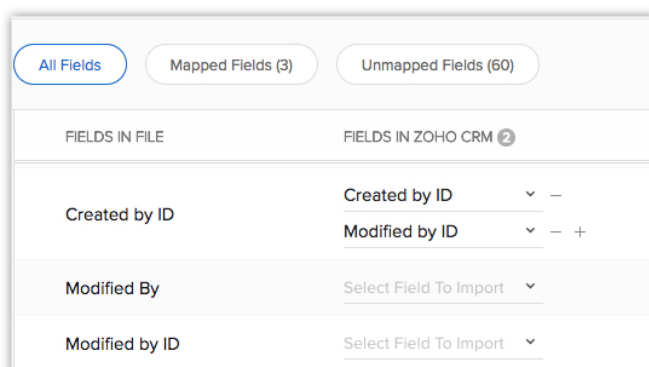
14. Select the checkbox to **Enable Manual Lead Approval**.

The records will be manually approved by the admin before being assigned to specific users. This option is available only for the Leads, Contacts, Cases and custom modules.

15. Click **Finish** to initiate the import action.

Important Points:

- Select the **[Module ID]** from the *Find existing using* field, if and only if you are re-importing the records that were exported from Zoho CRM. The **[Module ID]** field is generated by Zoho CRM and is therefore unique to Zoho CRM. Hence, it is ideal to choose this as a unique field in cases when you want to export a set of records from Zoho CRM to a spreadsheet, make some changes, and import the records again. In this case, when you choose the **[Module ID]** as the unique field and choose to update the existing records, the matching records are seamlessly updated. Choosing the **[Module ID]** as a unique field in any other case may cause duplication of records.
- The unique fields are **not** case sensitive. That is, if the unique field's value in the import file is "ABC" and in the existing record it is "abc," Zoho CRM will still identify this as a match.
- Once the Import process begins, you cannot cancel it.
- The manual approval option is available only while importing leads.
- If you select a workflow task while importing, the **Notify Assignee** option in the selected workflow task will not be applicable.
- During field mapping, you can choose to map more than one CRM field to the import field. For example, if Created by and Modified by fields are the same you can map both these CRM fields to the Created by ID.



Exporting Data

Zoho CRM allows you to export and take a backup of all your CRM data in a few simple steps. The different export options available are:

- Export data
- Request CRM data backup

The Export Data feature allows you to export data (in CSV format) from individual CRM modules. After exporting the data, you can further validate or store the data in your own server(s).

Activity B

Importing data

Scenario

Your sales team has gathered information about prospective leads in response to advertisements by ABC Corp. The information has been collected in an external file named Advertisement Leads.csv. As the Zoho CRM administrator, you need to import the data into the Leads module by mapping the columns in the .csv files with the Leads module fields and assigning ownership to your administrative user account. You want to manually approve the lead records after importing them. Finally, you want to verify that the leads were imported successfully.

You need to

1. Select the Advertisement Leads.csv file and select **Advertisement** as the Lead Source. Check the **Enable Manual Lead Approval** check box. In the *Duplicate Records* section, verify that the **Overwrite** option is selected, select the **Advanced Options** link, and select **OK** to enable manual lead approval.
2. Map the columns in the .csv file to the fields of the *Address Information* section of the Map Fields page.
3. In the *Change Owner* dialog box, from the users list choose Jim Smith as the owner. Verify that the ownership has been changed and then approve the imported records.

Lesson C:

Web Forms

Lesson Objectives

In this lesson, you will:

- Learn how to create web forms.
- Learn to setup autoresponse rule.

Web Forms

Website integration in Zoho CRM helps you work seamlessly with your organization's website and Zoho CRM. It helps capture leads from landing pages, gather feedback from website visitors, and invite customers to upcoming events. It enables you to easily embed Zoho CRM web forms into your website to simplify the process of capturing visitor or user information from your website and pushing the data into your Zoho CRM account. It is an automated process in which data collected from the web forms are automatically added to the Leads, Contacts, or Cases modules. Zoho CRM makes it easy for users with no technical background to design and publish web forms.

After creating a web form, you can customize it to make it meet your business needs.

Web forms can be used to:

- Capture data (visitors' information)
- Communicate with website visitors
- Conduct surveys
- Respond to user questions
- Generate online sales
- Receiving online feedback

Guidelines for creating web forms

- Create a default email template to send automated replies to website visitors upon submission of their information.
- Create an assignment rule if you wish to assign the incoming records to specific users or to assign them based on a round-robin method. By default, all incoming records are assigned to the administrator.
- Configure the web form further, if needed, to suit your requirements.
- Customize the fields to be added in the web form.
- Test the web form before publishing it on your website.

Usage of different types of web forms

Each type of web form is typically used on specific pages of a website. They contain default fields, one of which is mandatory. The actual details, which vary from one form to another, are listed below.

Web Form for Leads: This form is usually used on product and landing pages. Last Name, Email, and Phone fields appear by default. The Last Name field is mandatory.

Web Form for Contacts: This form is usually used on signuUp, Contact Us, and other personal information pages. Last Name, Email, and Phone fields appear by default. The Last Name field is mandatory. If you add the Account Name field to a web form, an account will automatically be created in Zoho CRM. If an account with the same name already exists in your CRM account, a new account will not be created when the form details are submitted.

Web Form for Cases: This form is usually used on support pages. Status, Subject, and Description fields appear by default. The Subject field is a mandatory field.

Approval of Web Form Records

If you have enabled the Request for Approval option while creating the web form, the records that are entered through the web form will be available on the Approve Records page for the respective module. These records can be approved by users who have the Approve Web-to-Leads/ Contacts/Cases permission in their profile.

After you have captured leads, contacts, or cases details using web forms, you need to select and approve the records after checking and ensuring that they are not duplicates. Only then will the records be added to Zoho CRM.

Creating Web forms

The web forms that are generated for the Leads, Contacts, Cases or custom modules help you capture information from your website and import it into Zoho CRM. Zoho CRM will generate the HTML code that you can paste directly into your website. A module record is created every time the form is submitted.

Creating a web form involves three steps:

1. Building the form: Drag and drop fields to build a form and format it easily with the WYSIWYG editor.
2. Specifying the form details: Add details such as form name, landing page URL (where the visitor needs to be redirected after the form is submitted), record assignment rule, notification details, etc.
3. Generating the code for the form: You can embed the form using various code formats. Code for some third-party sites (WordPress, Google Sites, Facebook, and Joomla) are readily available.

WYSIWYG Editor

The WYSIWYG editor helps you to reorder fields; change the font style, font size, font color, and background color; change label alignment; upload files; and add hints to fields either as text or URL. WYSIWYG is the acronym of What You See Is What You Get. This editor provides a preview of the web form while you are creating it.

The table below provides the list of elements that are available in a web form.

Add fields	Drag and drop the fields that are required in the form. By default, some of the fields are already added when you build a new form.
Set field fonts and form layout	Use the WYSIWYG editor to change the font style and size, background color, alignment of the fields, etc. in the form.

<p>Insert Captcha</p>	<p>Captcha is used for security in feedback forms, website registration, comments from visitors, etc. Add captcha for the Zoho CRM system to prevent unauthorized automated spamming programs from filling out the web form. This option is available only in the Paid editions.</p>
<p>Add privacy policy link</p>	<p>Add a checkbox for people to accept your legal agreements such as Terms & Conditions, Privacy Policy, etc.</p>
<p>Upload files in the form</p>	<p>Capture files through your web-to-lead/contact/case forms (or any other custom module), such as screen shots of an issue, quote requests, photos of individuals, etc. You can upload up to 3 files and the size of all the files put together should be within 20 MB. If the total file size exceeds the limit, the form will not be submitted and the record will not be added in Zoho CRM. This option is available only in the Paid editions.</p>
<p>Mark fields as mandatory</p>	<p>Collect important information such as name, email address, mobile number, etc. from the visitors who fill out the web form.</p>
<p>Mark fields as hidden</p>	<p>Add a hidden field and its value in the form. These hidden values are submitted along with the web form but are hidden to the visitors who fill out the form.</p>
<p>Add help link for a field</p>	<p>A field you provide may require data to be filled out in a specific format. For example, the date format may need to be specified in DD-MM-YYYY. You can use this option to add a tip or hint to help the visitor who fills out the form.</p>

Change button name	The name of the call to action button can be Save, Submit, or another name. You can easily change the name if your needs change.
Specify location URL of the form	The Location URL is the web page URL where you plan to host the web form. Specifying the URL helps you prevent spam and allows only forms submitted through the provided domain to be captured as valid information.
Specify landing page URL	This is the URL of the web page to which the visitor needs to be redirected once the web form is submitted.
Select record assignment rule	Records generated through the web forms can be automatically assigned to the users in CRM with the help of assignment rules.
Specify notification options	Set notifications that need to be sent to the record owners and the visitors who submit the forms. Email templates or autoresponse rules can be used to send notification emails. When the email has to be sent to users within the organization, it is sent as a notification from the email address <code>notifications@zohocrm.com</code> .
Enable double opt-in	Enable the double opt-in mechanism for web forms, so that customers who submit their information will have to confirm their submission before their data is pushed into Zoho CRM.

Embed form code	Embed the web form's code in your web page. The code is available in three different formats: HTML source code, Embed code, and iFrame code.
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To generate web forms for Leads, Contacts, and Cases

1. Go to Setup > Developer Space > Webforms.
2. In the Web Forms page, choose the Module from the drop-down list.
The existing web forms for the selected module will be listed.
3. Click Create Web Form.
4. In the web form builder, do the following:
 - **Build a form**
 - a. Drag and drop the fields that you need in the web form
 - b. Insert captcha
 - c. Add the option to upload files
 - d. Mark fields as mandatory
 - e. Make fields hidden in the form
 - f. Provide hint or help links for fields
 - g. Set font and layout of the form
 - h. Change button names
 - **Specify form details and other options**
 - a. Add form details such as form name, landing page URLs, or form location URL
 - b. Set record assignment rule
 - c. Set notification options
 - **Get code to embed in your site and other third-party sites.**

The code is available in three different formats: HTML source code, Embed code, and iFrame code

Step 1: Build a Form

Drag and drop fields in the WYSIWYG editor, which also provides various other options to build a form.

Add Fields

Drag and drop the fields you need in the form and change the font style and size, background color, alignment of the fields, etc.

To add fields and set font and layout of the form

1. Under the *Fields List* tab, click on a field, and drag and drop it in the form builder.
2. Make changes to the font, background color, field label alignment, and form width.

Upload Files

Capture files through your web-to-lead/contact/case forms, such as screen shots of an issue, quote requests, photos of individuals, etc. The combined size of the file(s) should be within 20 MB. If the file size exceeds the limit, the form will not be submitted and the record will not be added in Zoho CRM. This option is available only in the Paid editions.

To add the option to upload files

1. Select the **Advanced Tools** tab.
2. Drag and drop the **File Upload** field.
Note that the visitor cannot upload a file exceeding 20 MB. You can use the help link option in the *Field Settings* to provide this hint.

Insert Captcha

Add captcha to prevent unauthorized automated spamming programs from filling out the web form. This option is available only in the Paid editions.

Insert Privacy Policy Option

Every business has some form of legal agreements in place, such as a Terms & Conditions agreement, a privacy policy, or an End-User License Agreement (EULA). It is important that people read such agreements and legally agree to them with a deliberate action such as selecting a checkbox in a form.

In Zoho CRM, you can make sure this is addressed by using the Privacy Policy option. Using this option you can add a checkbox and customize the message appropriately. Unlike other checkbox fields, this checkbox field has a validation; the form will be submitted only after this checkbox has been selected.

To insert privacy policy option

1. Click the Advanced Tools tab.
2. Drag & drop the **Privacy Policy** field.
3. In the Privacy Policy popup, add and format your desired message.
You can add a link to the text as well (for example, a link to the privacy policy page).

Mark Fields as Mandatory

Collect important information such as name, email address, mobile number, etc. from the visitors who fill out the web form by marking fields as mandatory.

To mark fields as mandatory

1. Move your cursor to the field that you want to mark as mandatory.
2. Click on the **Settings** icon.
3. In the *Field Properties* pop-up, select the **Mark as required field** checkbox.
4. Click **Done**.

Mark Fields as Hidden

Add a hidden field and its value in the form. These hidden values are submitted along with the web form but are hidden to the visitors who fill out the form. For example, if you have hosted the same form in various web pages, the hidden field

will help you identify which web page hosted the web form that generated a specific record.

To make fields hidden in the form

1. Move your cursor to the field that you want to hide in the form.
2. Click on the **Settings** icon.
3. In the *Field Properties* pop-up, select the **Mark as hidden field** checkbox.
4. Specify the value for the field and click **Done**.

Provide Help Link

A field you provide may require data to be filled out in a specific format. For example, the date format may need to be specified in DD-MM-YYYY. For such requirements, you can use the option to add a tip or hint to help the visitor who fills out the form.

To provide hint or help links for fields

1. Move your cursor to the field for which you want to provide a hint or help link.
2. Click on the **Settings** icon.
3. In the *Field Properties* pop-up, select the **Include help link** checkbox.
4. Choose one of the following:
 - **Link & Text:** Specify a text for the link and provide the link URL.
 - **Text Only:** Specify the help/hint text. For example, the date field can have the format MM-DD-YYYY.

5. Click **Done**.

Field Properties

Label: Date

Forma...

Options: Mark as hidden field
 Mark as required field
 Include help link

Link & Text Text Only

Date Format DD/MM/YY

Change Button Name

By default, there are two call-to-action buttons: Submit and Reset. You can rename these buttons as needed.

Step 2: Specify Form Details

1. Enter a **form name** (e.g., Feedback, Contact Us, etc.).
2. Specify the **form location URL**. This should be the web page where the web form will be hosted. It should start with "http://" or "https://" (e.g., https://www.zylker.com/contact-us.html).
You can click Add to specify up to five location URLs. If you plan to host the web form in more than five web pages or you are not sure where the web form will be hosted, enter * in this field. This prevents spam and allows only forms submitted through the particular domain to be captured as valid information.
3. Specify a **landing page URL**. The visitor who submits the form will be redirected to the URL specified here. It should start with "http://" or "https://".

The length of the return URL should not exceed 255 characters

(e.g., <https://www.zylker.com/thank-you.html>).

The screenshot shows a configuration form for a web form. The fields are as follows:

- Form Name***: Contact Us
- Form Location URL***: <https://zylker.com/lp/contact-us.html>
- Landing page URL***: <https://zylker.com>
- Assign Owner***: Default Owner : Alicia Banks
- Add Tags**: London Tradeshow
- Enable Double Opt-in**: A confirmation email with a unique URL will be sent to subscribers who fill out the form. Subscribers must click the link to be added to CRM.

4. Choose one of the following options to **assign an owner** to the records that are submitted via web form:
 - **Choose a User**: Select from the drop-down list. All the records generated through the form will be assigned to the selected user.
 - **Create or Choose [Module] Assignment rule** to assign ownership: Select an existing assignment rule or create a new one. Records will be assigned to the users based on the rule you set. With assignment rules you can implement the round robin method to assign records to the users.
5. Add relevant **tags**, if applicable, from the list of existing tags for the module.

The chosen tag will be added to all of the records captured from the web form.
6. Toggle on the **Enable Double Opt-in** button.

Note that this option can be used only if the primary email field is added to the web form. When a web form with double opt-in is submitted, a confirmation email is sent to the visitor for additional verification.
7. Enable **Notify [Record] Owner** if required and select an email template that will be sent to the record owner. When the email is to be sent to users within the organization, it is sent as a notification from the email address notifications@zohocrm.com.
8. Enable **Acknowledge Visitor** if you want to send an email to the person who submitted the web form. After you select the mail template, you will be prompted to enter the **From** and **Reply to** fields. Here you can choose one of these options in the drop-down list:

- **Using Auto-Response Rule:** Use one of the existing autoresponse rules. Based on the details gathered using the web form, autoresponse rules can be triggered to send specific emails.

When details gathered through the web form do not satisfy the Autoresponse rule criteria, then the email template selected in the second option will be sent as an acknowledgment email.

- **Default response for all visitors:** Choose an email template that will be used to send email to the leads generated via this web form.

9. Enable **Visitor Tracking** and select the portal from the drop-down list. If you have enabled the feature, this will automatically include the visitor tracking code in your web form's code (applicable only for the **Source code** and **Embed code** formats).

- If you choose the **iFrame code** format in the *Embed Options*, you have to manually add the visitor tracking code along with the iFrame code in your web page. For the iFrame code format alone, the visitor tracking code is not automatically included along with the code. For the **Source** code and **Embed** code formats the visitor tracking code will automatically be included.

To find the Visitor Tracking code to embed, go to **Setup** > **Channels** > **Chat** and copy the code from the Visitor Tracking page.

- If you have not enabled the Visitor Tracking feature, you will be asked to create a portal here to start using this feature.

10. Select the **Request Approval** checkbox if you want to submit the records for approval. Note that users with the Approve Web-to-Leads/Contacts/Cases permission in their profiles can approve the records.

11. Click **Save**.

Note:

If the domain name in the location URL does not match the URL where the web form is hosted, then the information will not be captured. Alternatively, you can enter [*] in the landing URL field to capture from other / multiple domains.

Step 3: Use Web Form Code to Embed

The code for the web form is available in three formats: Source code, Embed code, and iFrame code. The code is also readily available for some third-party sites: WordPress, Facebook, Google Sites, and Joomla. Please note that the Script and iFrame code is available only in the Paid editions.

To embed web form code

1. Select **Source** code, **Embed**, or the **iFrame** code from the list as required.
2. Copy the code and paste it in the website where you want the web form.
3. Select the Track the records along with Google AdWords information through web forms checkbox, if desired.

4. Copy the tracking code displayed and paste it at the bottom of every page of your website immediately before the </body> tag.
5. Note that this Google AdWords tracking code appears only if you are a Google Suite user and you have enabled Google AdWords integration.
6. Click **Done**.

Embed options

Please use the below code snippets to capture the leads from your websites.

[Supported CMS/site:](#) Your website, Joomla, Zoho Sites, WordPress, Facebook and Google Sites.

Your Webform Code Format:

<!-- Note :
 - You can modify the font style and form style to suit your website.
 - Code lines with comments "Do not remove this code" are required for the form to work properly, make sure that you do not remove these lines of code.
 - The Mandatory check script can modified as to suit your business needs.

1. Copy the 'Source Code'
2. Use it on your websites or supported sites.

Track your Leads along with Google AdWords information through web form.

Tracking Code

```
<script type="text/javascript"
src="https://js.zohostatic.com/crm/t133/javascript/zcga.js"></script>
```

1. Please use the tracking code at the bottom of every page of your website.
2. Make sure you paste it immediately before </body> tag.

[Done](#)

Note:

- In order to avoid spam, the generated Web Form (HTML file) must be published in an active web server (Apache, Microsoft, IIS, etc.).
- The web form will not work if you submit the form values from your desktop.
- When the HTML code is generated for the web form, certain entities are hidden by default. If you remove those hidden entities, the web form will not work. Here is the code snippet that should not be removed from your web form code:

```
<input type="hidden" name="xnQsjsdp" value="" /> <input type="hidden"
name="xmlwtLD" value="" /> <input type="hidden" name="actionType" value="" /
```

Enable Double Opt-in

Double opt-in is a process in which users confirm twice that they are interested in what you offer and willingly fill out the web form. It helps you get quality leads, and lets you dedicate time and resources to people who want to hear from you. When

you enable the double opt-in mechanism for web forms, customers who submit their information will have to confirm their submission before their data is pushed into Zoho CRM.

The two steps that are involved in double opt-in are:

1. A user fills in their email address and other details and submits the form through your website.
2. A confirmation email is sent to the email address provided by the user. The user needs to click on the link in the email and confirm.

To enable double opt-in for your web form

1. Go to Setup > Developer Space > Webforms.
2. In the *Web Forms* page, choose the **Module** from the drop-down list. The existing web forms for the selected module will be listed.
3. Click **Create Web Form** or choose one of the existing web forms.
4. In the web form builder, edit the form if required and click Next Step.
5. In the *Form Details* popup, toggle on the **Enable Double Opt-in** button. Note that this option can be used only if the primary email field is added to the web form. When a web form with double opt-in is submitted, a confirmation email is sent to the visitor for additional verification.
6. Click **Save**.
7. Publish the new web form's code that is generated on your website.

Activity

Setting up Web form

Scenario

Your organization has decided to set up a web form on the company's website for capturing lead information.

A. You need to create a web form named "Web-to-Lead Form" that includes the following fields:

- First Name
- Last Name
- Title
- Company
- Email
- Phone
- Website

Furthermore, you need to make the Email and Phone fields mandatory.

B. In addition, you need to use *https://www.zylker.tld* and *https://www.zylker.tld/web2lead* for the landing page URL and form location URL fields, respectively. All records will be assigned to Jim Smith. Finally, you need to notify the record owner when a form is submitted using a system-generated alert, and use the On Your Site option to embed the web form on your website.

You need to

1. A. Create a new web form for leads named "Web-to-Lead Form." In the Field Properties dialog box check the **Mark as required field** check box to make the fields mandatory. Finally, preview the web form and verify the contents.
2. B. Specify the form location and landing page URLs in the Form Details page. From the Ownership Assignment section select Jim Smith as the

owner, toggle on the **Notify Leads Owner** switch, and select the **System Generated Alert** option. Finally, toggle on the **Request for Approval** option.

Lesson D:

Data Deduplication

Lesson Objectives

In this lesson, you will:

- Learn how to merge duplicate values.
- Learn to arrest duplicate values before creation.

Overview

In large-scale organizations where you deal with a significant volume of data on a day-to-day basis, it can be challenging to keep your database free from duplicates. As the avenues to create records in CRM increase, the chances of duplicate entries increase as well. For example, the same lead may be created via import as well as via APIs. To help you manage a clean set of data, Zoho CRM offers both proactive and reactive solutions.

- **Arrest duplicates before they can be created**

By marking a certain field as a "unique field," you can stop the creation of a duplicate record. This is a proactive way to maintain a clean database. For example, if you have marked the Phone Number field as a unique field in the Leads module, CRM will alert you if you create a second lead with the same phone number as an existing lead.

- **Merge duplicate records**

Despite creating unique fields and double-checking data, if you still think there could be a possibility of records getting duplicated, you can use Zoho CRM's de-duplication tools to merge them. Below are two ways you can merge the duplicate records:

- Find & Merge Duplicate Records
- Deduplicate Records (Auto-merge duplicates)

It is important for you to identify when to use which tool to effectively merge the duplicate records.

Find & Merge Duplicate Records

It is ideal to use this feature if you are looking for duplicates of a particular record.

Example: You know that a lead named "David Smith" has been duplicated and you wish to find and merge those duplicate leads. You can go to the specific record's Detail page and click the Find & Merge Duplicates option. This will fetch the duplicate entries for that record. CRM does not automatically merge the duplicates. Once the list of duplicate records is displayed, you can manually select

and merge the records from the search results. Using this method you can merge up to three fields at a time. This feature is available only for the Leads, Accounts, Contacts, and Vendors modules. There are also six CRM fields for which you can enter further criteria to search for duplicates:

- First Name
- Last Name
- Company
- Email
- Phone
- Mobile

Deduplicate Records

This option is helpful when you are not sure if there are any duplicate records and you want the CRM to run a duplication check based on certain unique fields.

Example: You can run a duplication check on the Leads module based on the Email field. You can go to a specific record's page, click deduplicate from the module's list view, and select the fields based on which the search will be made.

If you choose the Email and Company fields, CRM will search for all records in which the Email and Company field values are the same.

You can run a check based on a maximum of three fields at a time. CRM will automatically merge the duplicate entries if they are exact copies of each other.

However, there can be situations where the specified fields have the same value but the records are not otherwise identical—perhaps some other field has a different value in the two records. This situation is termed a "conflict," and you will have to resolve it manually.

Assume there are two leads with the same company names, but with different phone numbers. In this case, there is the problem of conflicting phone numbers, and to resolve it you have to instruct CRM on which record should be considered the master record before merging them. There are two ways in which you can resolve a conflict:

- **Resolve immediately:** When CRM throws up a conflict notification, you can immediately resolve it by clicking **Resolve Now**.
- **Resolve later:** If you are busy with other activities, click **Resolve Later**. You will be sent an email notification with the deduplication details. Access the link from this email when you are ready to resolve the conflict. Note that this link will be valid only for three days.

Points to remember

- If there are more than three duplicates, you will be prompted to choose any three to merge from the list of all duplicates.
- Note that in the case of auto-merge, the record with the latest "Last Activity Time" will be considered the master record. If there is a conflict in some of the field values between the duplicates, then you must resolve the conflict and then manually merge the records.
- Once you have specified the master record, all the related lists of child records are moved to the master record.
- The record(s) merged to the master record will be deleted permanently and the action cannot be reverted.

To merge duplicate records using the Deduplicate tool

1. Click the [Module] tab (e.g., Leads, Accounts, Contacts, or Vendors).
2. In the [Module] Home page, under *[Module] Tools*, click **Deduplicate [Module]**.
3. In the **Deduplicate [Records]** page, click the fields by which you would like to search the duplicate records.

Deduplicate Leads

Select Field

Select the fields you want to identify duplicate Leads with.

- Maximum of 3 fields can be selected.
- If all the values of the duplicate records are same, then those records will be merged automatically.

Email

Company

Phone

Mobile

Enrollment ID

Find And Merge Duplicates Cancel

You can select up to three fields. CRM will search for duplicates based on these fields.

For example, if you select Email and Company, CRM will look for records in which the Email ID and Company fields are the same.

Note that fields that you have marked as unique appear here. If you have not marked unique fields, CRM will display a standard set of unique fields for the module.

4. Click **Find and Merge Duplicates**.

A popup window informing you of the deduplicate function appears.

5. Click **OK**.

Deduplication will take few minutes. You will be notified via email and popup once this action is complete.

OK

with.

If the duplicates found by CRM are exact copies of each other, CRM will automatically merge them. In that case, no further action is required from the user.

Note that in the case of auto-merge, the record with the latest Last Activity Time will be considered the master record.

If there is a conflict between the duplicates in any of the field values, you must resolve the conflict and then manually merge the records.

Lesson E:

Backup & Storage

Lesson Objectives

In this lesson, you will:

- Learn how to make data backups of CRM records.
- Understand the guidelines for data backup.
- Learn to store data in CRM.

Introduction

The Data Backup option enables users with administrator privileges to take complete backups of Zoho CRM data by allowing you to send a request for backup to Zoho CRM. You can send a one-time backup request or schedule a weekly, biweekly, or monthly data backup. You will be charged \$10 (USD) for every backup. In the Paid editions, you get two free data backups per month. For example, if you have a paid edition and have requested to receive a data backup every week, then for your four monthly data backups you will be charged \$20 USD (two free backups and two paid).

Choose when to backup

You can choose to download the backup instantly or schedule it to take place at a specific time of your choice. Listed here are the options available for you, to choose when to backup your CRM data.

- Twice a month
- Once a month
- Every week
- Download immediately

Twice a month

The backup will be made available for you to download, twice in a month alternately, depending on the day of your choice. For example, if you choose Monday, the backup will be available for downloading on every alternate Monday.

Choose when to backup

Please choose any repeat type Twice a month (Recommended) Once in a month Every week Download immediately

Sunday Tuesday Wednesday Thursday Friday Saturday

Backup will be ready to download every alternate **Monday**

[Done](#)

Quick tip

- For users with the paid edition (except Ultimate) this type is recommended as you can efficiently utilize the 2 free backups that you are entitled to use and hence there is no need for purchasing additional backup(s).
- For users with the Ultimate edition, of the 4 free backups that you are entitled to use, you will be utilizing only two. You can utilize the others to obtain a backup archive on demand.

Once a month

The backup will be made available for you to download, only once in a month. You can choose the date or day in which the backup is to be ready for downloading.

For example, if data backup is scheduled to take place by date and the chosen date is 15th, then the backup will be ready for downloading on the 15th of every month.

Choose when to backup

Please choose any repeat type Twice a month (Recommended) Once in a month Every week Download immediately

[Choose a date](#) Choose a day

| | | | | | | |
|----|----|----|----|----|----|----|
| 1 | 2 | 3 | 4 | 5 | 6 | 7 |
| 8 | 9 | 10 | 11 | 12 | 13 | 14 |
| 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| 22 | 23 | 24 | 25 | 26 | 27 | 28 |
| 29 | 30 | 31 | | | | |

15th of every month

Done

If data backup is scheduled to take place by day and the first monday is chosen,

then the backup will be ready for downloading on the first monday, every month.

Choose when to backup

Please choose any repeat type Twice a month (Recommended) Once in a month Every week Download immediately

Choose a date [Choose a day](#)

First Sunday Monday Tuesday Wednesday Thursday Friday Saturday

▼ First
Second
Third
Fourth
Last

f every month

Quick tip

- For users with the paid edition (except ultimate), of the 2 free backups that you are entitled to use, you will be utilizing only one. You can utilize the other to obtain a backup archive on demand.
- For users with the Ultimate edition, of the 4 free backups that you are entitled to use, you will be utilizing only one. You can utilize the others to obtain a backup archive on demand.

Every Week

The backup will be downloaded every week. You can choose the day, when the backup should be downloaded. For example, If you choose monday, the data backup will take place on every monday of the month.

Choose when to backup

Please choose any repeat type Twice a month (Recommended) Once in a month Every week Download immediately

Sunday Monday Tuesday Wednesday Thursday Friday Saturday

Backup will be ready to download every **Monday**

Done

Note

- For users with the paid edition (except ultimate), choosing this type prompts you to purchase a weekly recurring data backup.

Upgrade Addon

You're about to make a purchase of weekly recurring backups. Kindly confirm your order before making the payment.

| | | |
|-------------------------------------|-------------------------------------|----------|
| Weekly Data Backup
(\$240 /year) | <input checked="" type="checkbox"/> | \$240.00 |
|-------------------------------------|-------------------------------------|----------|

Cancel
Make Payment

Backup Successfully Purchased

For any clarifications related to this purchase, please write us to payments@zohocorp.com

| | |
|-----------------------|----------------------------|
| Weekly Data Backup | 1 |
| Amount Paid | \$238.68 |
| Next Recurring Amount | \$660.00 ✕ |
| Next Recurring Date | 29 Aug 2019 |

Got it

Download Immediately

If you would like to have a data backup on demand, you can choose the download immediately option.

Schedule Data Backup

To schedule a data backup

1. Log in to your Zoho CRM with administrative privileges.
2. Go to Setup > Data Administration > Data Backup.

3. Click the radio button to choose when the backup should take place and click **Done**.

The backup summary will appear.

It shows the type of backup chosen, status of backup and when the next backup will take place.

Download Data Backup

Once the data backup is ready, the user with administrative privileges can download it. The data and the attachments will be grouped into separate .zip folders.

CRM Data - The records under each module will be made available.

CRM Attachments - All the attachments in your CRM Account i.e. attachments of records in the module will be available.

To download Data Backup

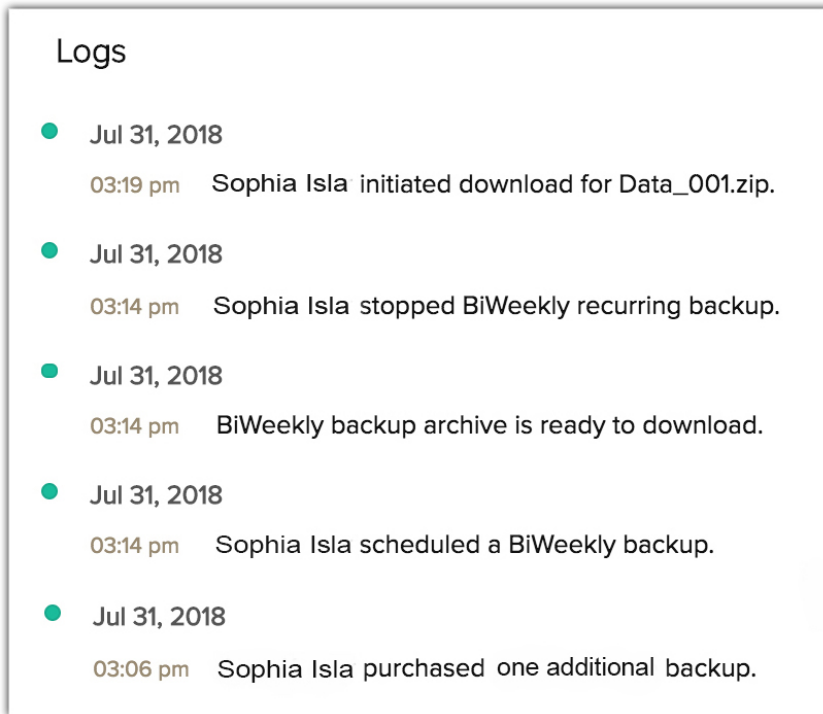
1. Log in to your Zoho CRM with administrative privileges.
2. Go to Setup > Data Administration > Data Backup.
3. Click the file under the download section to download it.

Logs

The chronological sequence of action performed, pertaining to data backup will be listed here. They include actions such as

- **Configuration** - Upon scheduling backup, the log will be updated with the configuration chosen by the user. For example, Sophia Isha scheduled a BiWeekly backup.
- **Backup is ready to download** - When the backup is ready for downloading.
- **Download initiated** - When the backup is downloaded by the user.
- **Stopping a scheduled backup**

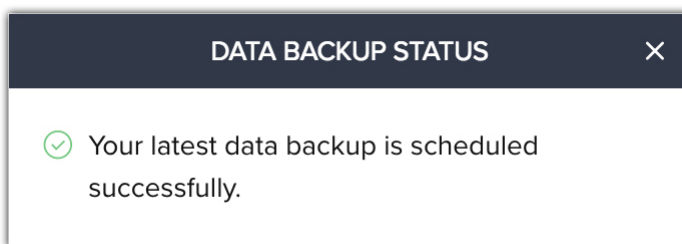
- **Backup purchase details** - Details of backup add-on purchased will be updated in the log.



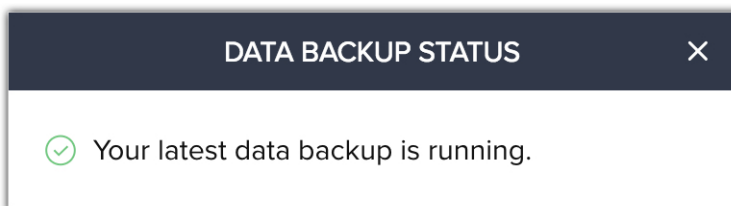
Data Backup Notification

Administrators who configured backup, gets popup notifications in the following cases:

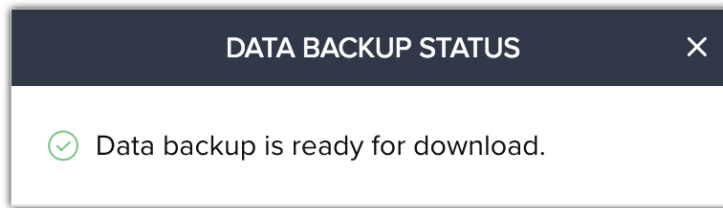
- When the backup is scheduled.



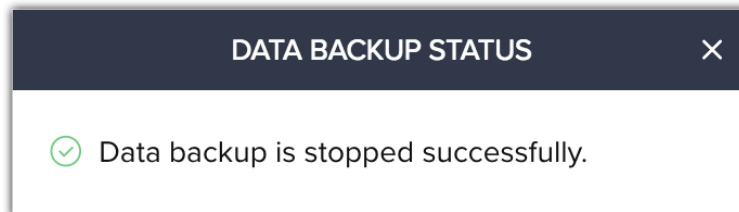
- When the backup is being archived.



- When the backup is ready for download.



- When the administrator stops backup.



Stop Recurring Backup

When you have a data backup scheduled, you can choose to cancel it when the need arises.

Note

- This operation will not stop your recurring subscription payment for weekly backup, to cancel your subscription payment, please visit subscription page.
- You can't stop a backup when it's currently running or after the backup is ready for downloading.

To stop backup

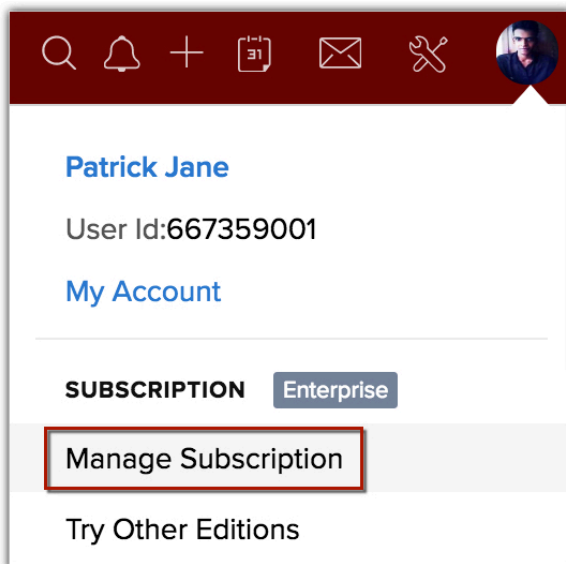
1. Login to your Zoho CRM account with the Administrator privileges.
2. Go to Setup > Data Administration > Data Backup.
3. In the Data backup page, click **Stop Backup** from the *backup summary* window.
4. Click **I understand**, from the popup to stop your backup.
5. Click **Cancel** to stop the operation.

Purchase backup

Users with the free edition of Zoho CRM have to purchase onetime data backup add-on or upgrade to a paid edition of Zoho CRM and utilize the free data backup available. Once that is exhausted, if you would like to backup the CRM data, you can purchase the add-on.

To purchase backup from the subscription page (Users with free edition)

1. Login to your Zoho CRM account with the Administrator privileges.
2. Click your Profile > Subscription > Manage Subscription.



3. Click **Buy Now** against the Onetime data backup add-on.

1 Choose an edition based on your business needs Currency

| STANDARD | PROFESSIONAL | ENTERPRISE | ULTIMATE |
|---|---|--|--|
| \$12
/user /month billed annually
\$18 month-to-month | \$20
/user /month billed annually
\$30 month-to-month | \$35
/user /month billed annually
\$45 month-to-month | REQUEST PRICING
Minimum 100 users |
| UPGRADE | UPGRADE | UPGRADE | CONTACT |
| FREE ⓘ + | STANDARD + | PROFESSIONAL + | ENTERPRISE + |
| Sales forecasting
Scoring rules
Charts and KPIs
Document library
Roles and profiles | Email Integration
Social CRM
Google AdWords integration
Workflows and Macros
Blueprint - Process management | Territory management
Zia - Artificial intelligence
Multi-user Portals
Custom modules and buttons
Sandbox | Dedicated Database cluster
Priority support
Advanced customization
Advanced CRM analytics
Enhanced storage |
| ADD-ONS | ADD-ONS | ADD-ONS | |
| Storage \$48 /5 GB /year
Weekly Data Backup \$240 /year
Online Training \$699 / user
Classroom Training \$799 / user | Storage \$48 /5 GB /year
Weekly Data Backup \$240 /year
Online Training \$699 / user
Classroom Training \$799 / user | Storage \$48 /5 GB /year
Portal Users \$144 / portal users/year
Weekly Data Backup \$240 /year
Online Training \$699 / user
Classroom Training \$799 / user | |
| ADD-ONS | Onetime Data Backup \$10 / unit | BUY NOW | Compare Edition in Detail |

4. Select the **number of backup units** you would like to purchase and click **Continue**.

The summary of your order will be displayed.

[Back to ZOHO CRM](#) Subscribe to ZOHO CRM in 4 easy steps

| 1 | Selected Edition | ZOHO CRM Free |
|---|---------------------------------|--|
| 2 | Edition Details | |
| | Onetime Data Backup \$10 / unit | <div style="display: flex; align-items: center;"> <div style="border: 1px solid black; padding: 5px; margin-right: 10px;"> Select </div> <div style="margin-right: 10px;">paid</div> <div style="background-color: black; color: white; padding: 5px;">\$0.00</div> </div> <div style="margin-top: 10px; text-align: right;"> <input type="button" value="Continue"/> </div> |
| 3 | Review Order | |
| 4 | Payment Details | |

5. Click **Confirm**.

6. Enter your *billing details* and click **Make Payment**.

4 Payment Details

Billing Details

Company Name Phone Number

Select Country Street Address

City State Zip/Postal Code

Card Number MM YY CVV

Use my billing address as my credit card address

Select Country Street Address

City State Zip/Postal Code

By proceeding you agree to our [Privacy Policy](#)

Safe and Secured Payment Gateway **Make Payment**

To purchase from Data Backup Window (Users with free edition)

1. Login to your Zoho CRM account with the Administrator privileges.
2. Go to Setup > Data Administration > Data Backup.
3. Click **Download Now** in the *Data Backup* page.

Purchase Backup popup appears, where you can choose the number of onetime data backup units and click **Continue**.

Purchase Backup ×

Choose the number of backups you wish to purchase.

| | | | |
|----------------------------|--------|------------|---------|
| Onetime Data Backup (\$10) | 1 unit | <u>USD</u> | \$10.00 |
|----------------------------|--------|------------|---------|

Total \$10.00

Continue

4. Enter the *payment details* and click **Make Payment**.

Payment Details

Billing Address

| | | |
|-------------------------|----------------|------------|
| Select Country | Street Address | |
| City | State | ZIP/Postal |
| Company/Individual name | Phone | |

| | | | | |
|-------------|----|---|----|-----|
| Card number | MM | / | YY | CVV |
|-------------|----|---|----|-----|

Use my billing address as my credit card address

| | | |
|----------------|----------------|------------|
| Select Country | Street Address | |
| City | State | ZIP/Postal |

Amount to be Paid : **\$ 10.00**

[Go Back](#) **Make Payment**

Purchase backup while upgrading Zoho CRM

You can purchase a weekly data backup and onetime data backup add-on at the time of upgrading from your free edition to a paid edition of Zoho CRM (Standard/Professional/Enterprise/Ultimate).

To purchase backup while upgrading

1. Login to your Zoho CRM account with the Administrator privileges.
2. Click your Profile > Subscription > Manage Subscription.
3. Choose the edition of Zoho CRM you need and click **Upgrade**.
4. Enable the **weekly data backup** checkbox to add that to your subscription. You can also choose to purchase **onetime data backup** by selecting the

number of units from the drop-down list.

The screenshot displays the 'Edition Details' section for Zoho CRM Enterprise. It includes options for Payment Frequency (Yearly selected), No. of User (1), and various add-ons. Two add-ons, 'Weekly Data Backup' and 'Onetime Data Backup', are highlighted with red boxes. A summary table at the bottom shows the total cost and a yearly discount.

| Zoho CRM Enterprise | |
|---------------------------------------|--|
| Payment Frequency | <input checked="" type="radio"/> Yearly <input type="radio"/> Monthly <i>Get 22% discount on yearly subscription</i> |
| Selected Edition | Enterprise |
| No. of User \$540 /user /year | <input type="text" value="1"/> \$ 540.00 |
| ADD-ONS | |
| Storage | <input type="text" value="5 GB"/> \$ 48.00 |
| Portal Users | <input type="text" value="45"/> \$6,480.00 |
| Weekly Data Backup \$240 /year | <input checked="" type="checkbox"/> \$ 240.00 |
| Online Training \$699 /User | <input type="text" value="1"/> \$ 699.00 |
| Classroom Training \$799 /User | <input type="text" value="1"/> \$ 799.00 |
| Onetime Data Backup \$10 /unit | <input type="text" value="1 unit"/> \$ 10.00 |
| Add-on total \$8,276.00 | |
| Total \$ 8,816.00 | |
| Yearly Discount - \$ 120.00 | |
| Amount to be paid per year \$8,696.00 | |

[Continue](#)

Purchase Onetime data backup add-on (User with paid edition of Zoho CRM)

Once your free data backup has been exhausted, you can purchase backup add-on if you would like to schedule a backup.

To purchase data backup from the subscription page

1. Login to your Zoho CRM account with the Administrator privileges.
2. Click your Profile > Subscription > Manage Subscription.
3. Click **Buy Now** in the *Nonrecurring Add-Ons* section.

- Select the number of one time backup add-on from the drop-down and click **Continue**.

Nonrecurring Add-on

| Item | Unit Price | No. of Units |
|----------------------------|------------|--------------|
| Online Training Add-On | \$699/User | Select |
| Classroom Training Add-On | \$799/User | Select |
| Onetime Data Backup Add-On | \$10 /unit | 2 unit |
| | | \$ 20.00 |

Continue **Cancel**

- Click **Make Payment** to confirm your order.

Confirm Order

| Item | No. of Units | Total /year |
|-----------------------|--------------|-------------|
| Onetime Data Backup | 2 unit | \$ 20.00 |
| Net amount to be paid | | \$ 20.00 |

Payment Method :

Make Payment **Back**

To purchase from the data backup page

- Go to Setup > Data Administration > Data Backup.
- Choose a repeat type and click **Done**.
A pop-up appears asking you to purchase data backup add-on.
This pop-up appears, only if you have exhausted your available data backup add-ons.

Upgrade Addon

Each backup can be purchased at \$10. Enter the number of backups you wish to purchase.

Onetime Data Backup (\$10)

| | |
|--------|---|
| Select | ▼ |
| 1 unit | |
| 2 unit | |
| 3 unit | |
| 4 unit | |

Cancel **Make Payment**

3. Select the number of units and click **Make payment**.

Downgrade Add-Ons

To downgrade add-ons

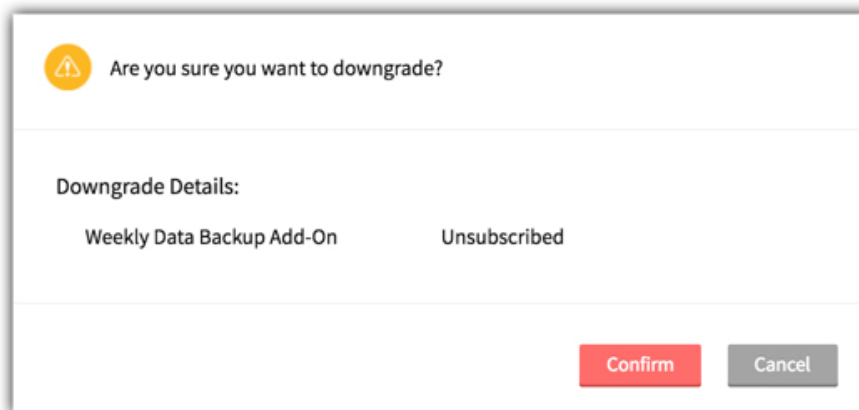
1. Login to your Zoho CRM account with the Administrator privileges.
2. Click your Profile > Subscription > Manage Subscription.
3. Click Downgrade User/Add-Ons.
4. Enable the checkbox of the backup that you have subscribed to and click **Downgrade**.

Downgrade Subscription

| Item | No. of Units |
|---|---|
| Number of User | (Purchased user: 1) <input type="text" value="Select"/> ▼ |
| Unsubscribe the weekly data backup Add-On | <input checked="" type="checkbox"/> |

Downgrade Cancel

5. Click **Confirm**.



File Format:

The exported CRM data will be in CSV format, compressed in a single archived (*.ZIP) file. You can open the file in Text Editor or in spreadsheet program.

Listed below are the steps to open the CSV file in Microsoft Excel:

For Microsoft Excel 2007 users:

1. Open **Microsoft Excel**.
2. On the **Data** tab, select **From Text**, from the 'Get External Data' section.
3. In the *Import Text File* dialog box, select the exported CSV file, and then click **Import**.
4. In the *Text Import* wizard dialog box, specify the following:
 - **File type:** Choose the file type as "*Delimited*".
 - **File Origin:** Select the file origin as "*Unicode(UTF-8)*", and then click **Next**.
 - **Delimiters:** Select the delimiter as "*Comma*", and then click **Finish**. You will be prompted to select the range of cells.
5. Select the range of cells and the corresponding CRM data will be imported in the spreadsheet.

For Microsoft Excel 2003users:

1. Open **Microsoft Excel**.
2. Click the **Data** tab and select the option **Import External Data**.
3. In the *Import Text File* dialog-box, select the exported CSV file, and then click **Import**.
4. In the *Text Import Wizard* dialog box, specify the following:
 - **File type:** Choose the file type as "*Delimited*".
 - **File Origin:** Select the file origin as "*Unicode(UTF-8)*", and then click **Next**.
 - **Delimiters:** Select the delimiter as "*Comma*", and then click **Finish**.
You will be prompted to select the range of cells.
5. Select the range of cells and the corresponding CRM data will be imported in the spreadsheet.

Note

- Zoho CRM does not, in any way, include any kind of harmful information or data into your exported files. However, as a precautionary measure to safeguard yourself from unknown security threats, it is recommended that you look for warnings about executable operations when opening an exported file in MS Excel. Please refrain from updating any commands in the CSV file exported from Zoho CRM.
- Following items will not be part of data backup:
 - Email - Email content and attachments.
 - Documents.
 - Entity Photos.
 - Any data that is obtained through Integration.

Lesson F:

Data Migration From Third-Party Applications

Lesson Objectives

In this lesson, you will:

- Learn to migrate data into your CRM account from the external sources.

Introduction

Imagine that your company is planning to merge with another company to expand your scope of business operations. During this merger, you need to have a replica of all data from the other company's existing system transferred to your Zoho CRM. The Data Migration wizard in Zoho CRM ensures that your data is migrated accurately and helps you reduce much of the manual work. It automatically maps import files to CRM modules and import file columns to Zoho CRM fields. In the case of modules that are not already available, Zoho CRM creates them and maps the relevant files to them. It gives you a clear indication of the number of files that are mapped, unmapped, and any that are not supported.

Data Migration

In Zoho CRM, data migration is a method of transferring data from other CRM accounts to Zoho CRM. As the first step, you need to export the modules from the other CRM application as individual .csv files. You can perform a module-wise data migration using these .csv files. Below is the list of modules that support data migration from other CRM systems:

- Users
- Leads
- Accounts
- Contacts
- Deals
- Campaigns
- Cases
- Attachments
- Products
- Solutions
- Notes
- Tasks
- Events

Migrate Options

Zoho CRM provides a custom-made setup to migrate data from Salesforce, other Zoho CRM accounts, Zoho ContactManager, Pipedrive, Highrise, Insightly, and any other CRM.

You can migrate from Pipedrive, Highrise, and Insightly via API. All you need is the instant URL to get going. Zoho ContactManager, on the other hand, is fairly simple as it does not require any configuration and data is migrated in a click.

Guidelines for Data Migration

Before you start migrating data we recommend that you go through the following guidelines for an overview of the migration process:

- The files should be in CSV formats.
- The file size can be a maximum of 4 GB. The number of files that you can migrate at one time is limited to 200.
- You can upload a ZIP file which should have the following structure:
 - **Data files from Salesforce:** The .zip file that you upload should have all the files in CSV format and one folder named Attachments. This folder will contain the source files used as attachments in Salesforce records. One of the CSV files will list the record and attachment mappings. This will be used to retain the records' association with the attachment files.
 - **Data files from Zoho CRM or any other CRMs:** There are two folders in this case. The **Data folder** should have all the data files, including the CSV file that contains information on the record and attachment mappings. The **Attachments folder** should contain the source files used as attachments in the CRM account.
- The above-mentioned folder structure is crucial for the Zoho CRM system to identify and map attachments to the records during migration. In some cases, when you unzip files, extra folders are created. Make sure to delete them and maintain the structure given above.
- Tabs or modules cannot be migrated whole into Zoho CRM, but you can always migrate the data from those modules. During the migration, Zoho

CRM identifies the data and suggests custom modules that can be created to accommodate the data.

- Similarly, Zoho CRM will suggest custom fields that are available in the import file but not in Zoho CRM. If required, you can create these fields before the migration.
- Based on the application from which you are migrating data, you may skip a couple of modules that are not relevant.
- When user data is migrated, only the first 2,000 records will be imported.
- Two or more files can be mapped to a module. In this case, the column header should be the same in all the files; only then you can map them to a single module.

Migration checklist

1. **File format:** The supported formats are **Excel (XLS, XLSX), Comma Separated Value (CSV), and Business Card or vCard Format (VCF)**. Unexpected errors may occur if the XLS/XLSX files contain any special controls such as combo filters or images embedded in them.
2. **Checkbox fields:** The values for checkbox type fields in the import file should be either "True" or "False." Imported data from checkbox fields are converted in Zoho CRM as follows:
 - If checkbox is selected: True or 1
 - If checkbox is not selected: False or 0
3. **Characters not allowed:** Any data for the file to be imported should not contain the following characters:
 - Double quotation marks(") – use only as a field delimiter
 - Vertical bar (|)
 - Angle brackets (<>)
4. **Multi-select pick list fields:** The values should be separated by semi-colons in the import file.
5. **Migrating Users:** You will not be able to migrate users who already have separate Zoho CRM accounts. Only when the users close their separate

accounts with Zoho CRM can they be imported into your company's CRM account.

6. **Update Mandatory Fields:** In your import file, you need to have data for all the mandatory fields in Zoho CRM. For example, "Last Name" is a mandatory field in Zoho CRM. Make sure that the "Last Name" column in your Leads import file has values. For the records that do not have a last name, you need to specify the values as "not provided," "none," etc. Any records that lack values for the mandatory fields will be ignored while importing.
7. **Drop-down List:** All data values displayed in the drop-down lists must exist in the corresponding Zoho CRM fields.
For instance, if you plan to import account information that contains a value for the industry type drop-down list, before you import the account information, make sure all the industry values in the source file already appear in the drop-down list. If the values do not exist, you must either change the values in the source file to match the existing values in Zoho CRM, or have your administrator add the new values.
8. **Field Names:** Make sure the first row of data (records) in the source file contains the column headings or field names rather than the actual data values. These heading field name values help identify the data when you map the new data to the existing fields in Zoho CRM.
9. **Blank rows in the import file:** More than 10 blank rows in the file might indicate the end of the file. Data after the blank rows will be ignored during import. Make sure not to leave blank rows in between rows of data.
10. **User data:** Always migrate the user details into your Zoho CRM first. Then make sure the record's Owner ID field is mapped with the Record Owner ID in Zoho CRM. For example, when you migrate leads, map the Leads Owner

ID field from the file with corresponding field in Zoho CRM.

| FILED IN FILE | FILED IN ZOHO CRM |
|---------------|------------------------|
| Lead ID | Lead ID |
| Lead Owner | Select Field To Import |
| Owner ID | Lead Owner ID |

| | A | B | C |
|----|--------------------|--------------|--------------------|
| 1 | Lead ID | Lead Owner | Owner ID |
| 2 | 16363700000086017 | Amy Gracelin | 16363700000033001 |
| 3 | 16363700000086021 | Alicia Banks | 16363700000033001 |
| 4 | 163637000000157036 | Fiona Smith | 16363700000034062 |
| 5 | 163637000000170001 | Amy Gracelin | 163637000000253021 |
| 6 | 163637000000215001 | Dia Victoria | 16363700000033001 |
| 7 | 163637000000271025 | Will Turner | 163637000000253021 |
| 8 | 163637000000326003 | Amy Gracelin | 163637000000253021 |
| 9 | 163637000000338001 | Fiona Smith | 16363700000034062 |
| 10 | 163637000000339001 | Fiona Smith | 16363700000033001 |

Every module in CRM consists of mandatory fields that must be mapped while importing. There may also be other mandatory fields in each module, but you can always customize and mark those fields as non-mandatory, if required.

Migrating from other CRM Systems

Follow these steps to successfully migrate your data into Zoho CRM from another Zoho CRM account or a different CRM system.

If you are planning to use a backup of data from Zoho CRM to import, the file structure does not change. However, if you have exported data from another CRM, you must use the following folder structure:

- The Data folder should contain all the data files, including the CSV file with the record of attachment mappings.
- The Attachments folder should contain the source files used as attachments in the CRM account.
- All your data should be in this format. If there are any extra folders, the upload may fail.

To migrate data

1. Log in to Zoho CRM with an account which has Administrator privileges.
2. Go to Setup > Data Administration > Import.

3. In the Data Migration page, choose **Zoho CRM** or **Other CRM**.
4. In the pop-up, browse and upload the files.
You can select multiple files or upload a .zip file to migrate data into more than one module.
5. Click **Next**.
Zoho CRM automatically reads your files and maps the data to the correct modules and fields.
6. You can do the following in the *Module-File Mapping* section:
 - a. View the mapped and unmapped modules separately.
 - b. Click on a file and see which module it is mapped to.
 - c. View the mapped, unmapped, and unsupported files separately.
 - d. Click the **Discard Migration** link to start again.
If custom modules were automatically created during migration, they will not be deleted. Only the data added to these modules will be deleted.
7. Click on a module to view the files that have been mapped to it.
You can also select from the unmapped files and associate them. Multiple files can be mapped.
8. Click **Next**.
The mapped modules will be listed where you can map the fields for each module.
9. In the *Map Fields* section, make sure that you map all the mandatory fields for each module.
The field names that you specified in the CSV file will be available in the drop-down lists.
10. Click **Create Custom Fields** if you want to add new fields and insert data into them during the migration.
You have the option to create a maximum of 50 fields during the migration. This limit is inclusive of the overall limit for custom fields in your Zoho CRM edition. (Skip to step 12 if you do not want to create fields.)
11. In the *Create Custom Fields* pop-up, do the following:
Modify the field labels, if required.
All the fields from the import file that were not mapped for migration

because they are not available in Zoho CRM will be listed with their column numbers from the import file.

12. Select the Field Type from the drop-down list.

Autonumber and Formula are not available. You cannot create these fields during migration.

13. Click **Create**.

The field will be created and mapped to the columns in the import file.

14. Click **Close** and continue the migration process.

15. Click Save and Next.

16. In the Review page, check the Field Mapping Status and the Pre Migration Status for Each Module.

17. Click **Start Migration** to initiate data migration.

You can still click Edit Mapping and Re-run Migration while the migration is running.

Notes

- The data migration process will be paused if more than 5,000 records in a module are skipped during migration. You will have the option to discard the migration or continue. Zoho CRM will also inform you for each module if more than 5,000 records are skipped.
- You can undo the data migration from Import History.

To migrate data from Zoho ContactManager

1. Go to Setup > Data Administration > Import.

2. In the *Data Migration* page, do the following:

- a. Choose Zoho ContactManager.
- b. Click **Migrate Now**.

You will be notified through a pop-up and email when the migration is complete.

Migrating from Salesforce

The .zip file you upload should contain all the files in CSV format and a folder named Attachments. This folder contains the source files used as attachments in Salesforce records. One of the CSV files will list the record of attachment mappings. This will be used to retain the records' association with the attachment files.

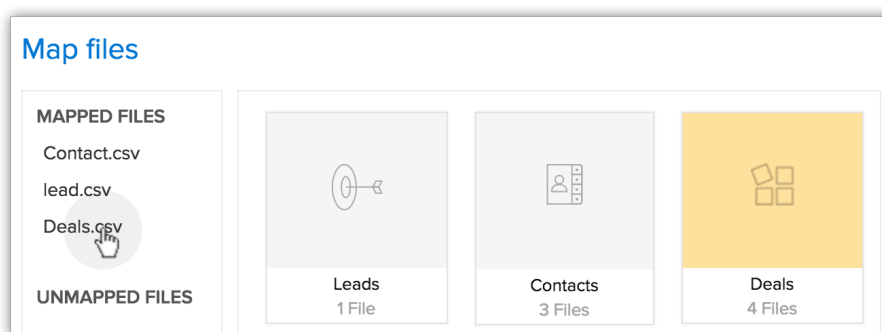
Data from any custom modules that you created in Salesforce will be stored in files with a "_c" suffix on the file name (e.g., registrations_c.csv).

All your data should be in the format described above. When you save the data backup to your local drive, it is a good idea to extract the files to check that the format matches and compress them again for import. This may sometimes create additional folders. If there are any additional folders in the .zip file, uploading your file may fail. The data backup from Salesforce will have additional folders named Attachments, Documents, and Content Version. These folders will not cause the migration to fail.

To migrate data from Salesforce

1. Go to Setup > Data Administration > Import.
2. In the Data Migration page, choose Salesforce.
3. In the pop-up, browse for and upload the files.
You can select multiple files or upload a .zip file to migrate data into more than one module.
4. Click Next.
Zoho CRM automatically reads the files and maps the data to the correct modules and fields.
5. You can do the following in the *Module-File Mapping* section:
 - a. View the mapped and unmapped modules separately.

- b. Click on a file and see which module it is mapped to.



- c. View the mapped, unmapped, and unsupported files separately.
- d. Click the **Discard Migration** link to start again.

6. Click on a module to view the files that have been mapped to it.
You can also select from the unmapped files and map them. Multiple files can be mapped at the same time.

7. Click **Next**.

The mapped modules will be listed where you can map the fields for each module.

8. In the *Map Fields* section, make sure that you map all the mandatory fields.
The field names that you specified in the CSV file will be available in the drop-down lists.

| FIELDS IN FILE | FIELDS IN ZOHO CRM | SAMPLE DATA FROM FILE | |
|----------------|---|-----------------------|-------------------|
| Salutation | Salutation ▾ | Ms. | Mr. |
| FirstName | First Name ▾ | Rose | Sean |
| LastName | Last Name ▾ | Taylor | Griffith |
| Email | Email ▾ | rose.taylor@sa... | sean.g@sample... |
| Title | Title ▾ | VP, Procurement | CFO |
| LeadSource | Lead Source ▾ | Web | Web |
| Phone | Mobile ▾ | (512) 757-9340 | (512) 757-4561 |
| Department | Department ▾ | Procurement | Finance |
| AssistantName | Assistant ▾ | Ron Sage | Chris Nobel |
| AssistantPhone | Asst Phone ▾ | (503) 421-6782 | (212) 842-5428 |
| CreatedDate | Created Time ▾
yyyy-MM-dd HH:mm:ss ▾ | 2004-04-30 03:... | 2004-04-30 03:... |
| CreatedByld | Created by ID ▾ | 00530000000... | 00530000000... |

9. Click **Create Custom Fields** to add new fields and insert data for them during the migration.

The number of fields that you can create depends on your Zoho CRM edition. (Skip to step 12 if you do not want to create fields.)

10. In the *Create Custom Fields* pop-up, do the following:

- Modify the field labels, if required.

All the fields from the import file that were not mapped for migration because they are not available in Zoho CRM will be listed with their column numbers from the import file.

| <input checked="" type="checkbox"/> FIELDS IN FILE | FIELDS IN ZOHO CRM | FIELD TYPE |
|--|--------------------|-------------------|
| <input checked="" type="checkbox"/> Registration Date | Registration Date | Date |
| <input checked="" type="checkbox"/> Org ID | Org ID | Integer |
| <input checked="" type="checkbox"/> RecordTypeld | RecordTypeld | Choose Field Type |
| <input checked="" type="checkbox"/> Reason for Cancelat... | Cancelation Reason | Text |

- Select the **Field Type** from the drop-down list.
Autonumber and Formula are not available. You cannot create these fields during migration.
- Click **Create**.
The field will be created and mapped to the columns in the import file.
- Click **Close** to continue the migration process.

11. Click Save and Next.

12. In the Review page, check the Field Mapping Status and the Pre Migration Status for Each Module.

| MODULE NAME | MAPPED FIELDS | UNMAPPED FIELDS |
|-------------------------------------|---------------|-----------------|
| Candidate (1 File) | 22 | 6 |
| Accounts (1 File) | 78 | 31 |
| Leads (1 File) | 64 | 28 |
| Deals (1 File) | 89 | 17 |

[Opportunity.csv](#)

13. Click **Start Migration** to initiate data migration.

You can still click **Edit Mapping and Re-run Migration** while the migration is running.

Note:

- The data migration will be paused if more than 5,000 records in a module are skipped during the migration. You will have the option to discard the migration or continue. Zoho CRM will also inform you for each module if more than 5,000 records are skipped.

Migration from Third-Party Applications

Data from Pipedrive, Highrise, or Insightly can be migrated a maximum of three times only. Their APIs and Instance URL are used during the migration.

To migrate data from Pipedrive, Highrise, or Insightly

1. Go to Setup > Data Administration > Import.
2. In the *Data Migration* page, do the following:
3. Choose Pipedrive, Highrise or Insightly.
4. Enter the **Instance URL** and the **API Token**.

Note that you need to enter the instance URL only if you are migrating data

from Highrise. For Pipedrive and Insightly, the instance URL is already added.

5. Click **Migrate Now**.

You will be notified when the migration is complete via a pop-up and an email.

Get API Token for Pipedrive, Highrise or Insightly

To get API token from Pipedrive

1. Log in to your Pipedrive account.
2. Click the account profile icon and then go to Settings.
3. In the User Settings page, click **Personal > API**.
Copy your personal API token.

To get API token for Insightly:

1. Log in to your Insightly account.
2. Click the account profile icon and then go to User Settings.
3. In the User Settings page, under API key, copy the API token.

To get API token and Instance URL for Highrise:

1. Log in to your Highrise account.
2. Copy the **Instance URL** from the browser.
It will be in this format: <https://sample.highrisehq.com/>
3. Click Accounts & settings > My Info > Integrations.
4. Under **Authentication token**, copy the API token.

Check for Data Accuracy

After importing each file, check that the data imported correctly. For example, after importing users into Zoho CRM, go to Setup > Users & Permissions > Users to check that all the users have been imported. Follow the same steps for Leads,

Accounts, Contacts, etc. If the data is not imported properly or the fields were incorrectly mapped, you can delete the imported records and reimport.

