



The  
world's   
**Favorite**  
**CRM**

Trusted by  
more than  
250,000  
businesses  
worldwide



**CRM that makes**

sales teams  
**more productive,**

managers  
**more effective,**

and executives  
**more informed.**

# Lead Management

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

Canvas View:

Hot Leads ▾

Edit



AUG 15, 2022



**Emma Kortemanl** / Lost Lead

emma@sketlesdevelopers.com / +31481350370 / +31619176069

Support & Information manager / Sketles Developers / Small/Medium Enterprise

Jacob Luluwao

Jan 7, 2022 03:29 AM



AUG 22, 2022



**Ercole Dellucci** / Not Contacted

ercole@starlabbs.com / +390322 6879836 / +390332 4615406

Manager - Customer outreach / Star Labs / IT Services

Amelia Burrows

Oct 4, 2022 06:59 AM



AUG 9, 2022



**Thomas Gibson** / Contact in Future

thomas@initechh.com / +1910-465-8938 / +1910-465-5872

CEO / Initech / ERP

Amelia Burrows

Oct 4, 2022 07:09 AM



AUG 9, 2022



**Kyla Miller** / New

kyla@livelife.com / +1303-321-2945 / +1709-787-8761

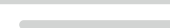
Support & Information manager / Sketles Developers / Small/Medium Enterprise

Joane Lee

Oct 4, 2022 10:29 AM



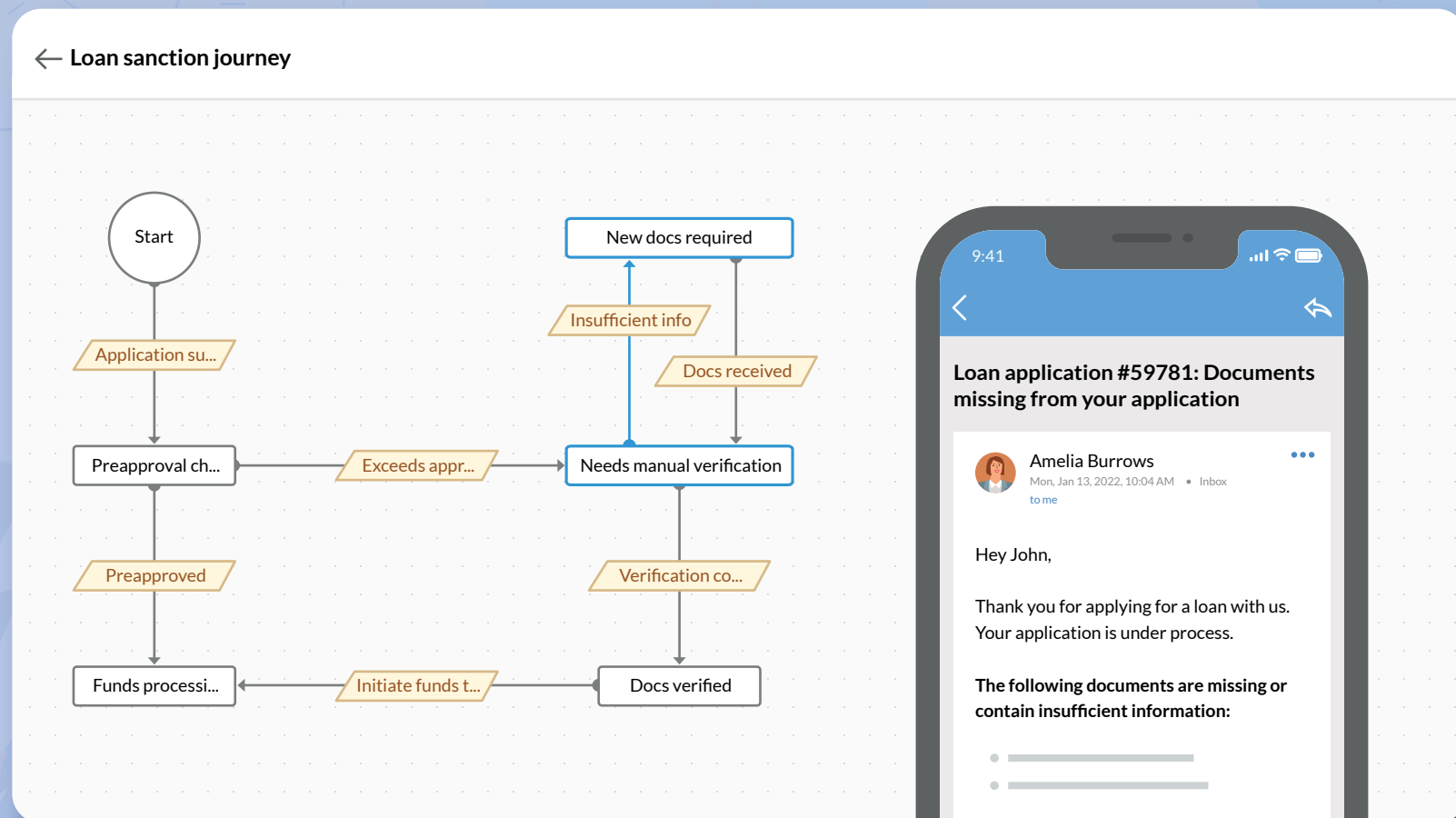
Placeholder for contact information





# Journey Orchestration

Create personalized customer journeys and provide your customers with a seamless brand experience that really connects with them.



# Omnichannel Communication

Connect with customers and prospects in real-time over email, phone calls, social media, and customer portals.

## Telephony



**Melinda Anderson**

Calling...

ANSWER



**Melinda Anderson**

Ventura Capitalists

Open Deal ^

180 Widgets - \$18,000,00

Deal Owner	Amella Burrows
Stage	Proposal/Quote
Probability (%)	75
Expected Revenue	\$13,500,00
Closing Date	2022-07-29

## Live Chat



**Chloe Reese**

Apex Corp, \$ 38,000,00

Pages Visited 5 Pages ⌚10:23  
now in Pricing page

Days Visited	Last Visited
4	Yesterday



**Visitor 80578**  
United Kingdom

Pages Visited 2 Pages ⌚10:14  
now in Contact page

Days Visited	Last Visited
4	Today



**Jack Brown**  
United States

## Email

### Email Status

sent  
in the last 2 days

and status is

- ☐ opened
- ☐ not opened
- ☐ bounced
- ☒ opened and not replied

## Social



**Lini Evans**

@Levans  
San Francisco, CA

☐ Add as Lead ☒ Add as Contact

Layout Standard

Account Name Betacry Inc

First Name Lini


Last Name Evans

Email lini.es@bet.com


Owner Michelle Brown

# Predictive Sales and Intelligence

Zia, an AI-powered sales assistant comes in-built with Zoho CRM, to help you manage your CRM data efficiently, and stay on top of every activity.


 How can I help?

Get me the number of leads created this month by source

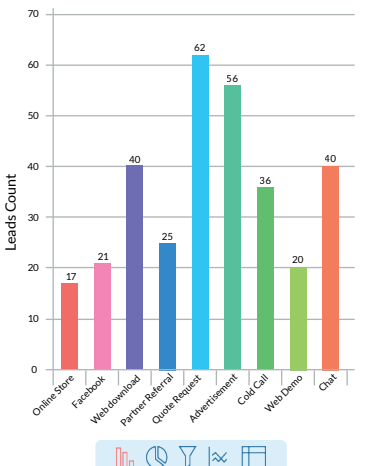



LEAD SOURCE	LEADS COUNT
Online Store	17
Facebook	21
Web Download	40
Partner Referral	25
Quote Request	62
Advertisement	56
Cold Call	36


Type Here... (ex: Leads created this week)

 How can I help?


Get me the number of leads created this month by source, as a chart



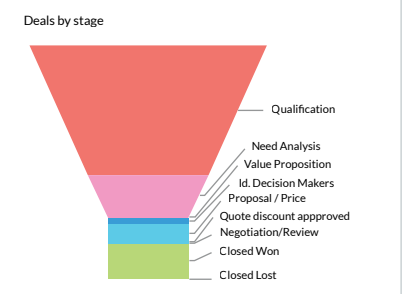

Type Here... (ex: Leads created this week)

 How can I help?

What is the revenue this month?

REVENUE THIS MONTH  
\$400,000

Show me the Deals by each stage



Type Here... (ex: Leads created this week)

# Customization

A truly customizable and fully extensible solution that can be modified as needed to fit your unique business needs.

The screenshot displays the Zoho CRM customization interface for the Deals module. On the left, a sidebar menu lists various modules: SalesInbox, Leads, Deals (highlighted with a mouse cursor), Contacts, and Accounts. The main area is titled 'Deals' and features a 'Standard' dropdown menu and 'Cancel', 'Save and Close', and 'Save' buttons. Below the title bar, there's a 'New Fields' section with a grid of field types: Single Line, Multi-Line, Email, Phone, Pick List, Multi-Select, Date, Date/Time, 123 Number, Auto-Number, \$ Currency, .00 Decimal, % Percent, 9...9 Long Integer, Checkbox, URL, Lookup, and Formula. A 'Subform' and 'NEW SECTION' button are also present. At the bottom of this section, it shows 'Unused Fields > 23' and 'Custom Fields Left: 301'. The right side of the interface is titled 'CREATE' and contains a 'Product Information' section. This section lists several fields: Product Owner (Lookup), Product Code (Single Line, highlighted with a blue box and a mouse cursor), Product Active (checkbox), Product Category (Option 1 v), Sales End Date (Date), Support End Date (Date), and Modified By (Single Line). A 'Preview' button is located at the top right of the 'CREATE' section.

← Deals Standard Cancel Save and Close Save

Modules Tab Groups Web Tabs

Search

DISPLAYED IN TABS AS MODULE NAME

SalesInbox SalesInbox

Leads Leads

Deals Deals

Contacts Contacts

Accounts Accounts

New Fields

Single Line Multi-Line

Email Phone

Pick List Multi-Select

Date Date/Time

123 Number Auto-Number

\$ Currency .00 Decimal

% Percent 9...9 Long Integer

Checkbox URL

Lookup Formula

Subform

NEW SECTION

Unused Fields > 23

Custom Fields Left: 301

CREATE

Product Information

Product Owner Lookup

Product Code Single Line

Product Active

Product Category Option 1 v

Sales End Date Date

Support End Date Date

Modified By Single Line

Preview

# Canvas for Zoho CRM

Canvas is the industry's first no-code CRM design studio, where you can redesign the user interface of Zoho CRM to suit your requirements and style.

The screenshot displays a redesigned Zoho CRM contact profile for Mrs. Melinda Anderson. The interface is divided into several sections:

- Contact Profile:** Includes a profile picture, name, and a list of fields (Title, Email, Phone, Contact Owner, Description, Territories) with their respective values.
- DEALS:** A section showing a deal named "South Deal" with a value of \$216,700.00 and a "Proposal/Price Quote" status.
- Properties:** A section displaying three property listings: "GOLDEN EAGLE COTTAGE", "AZURE CRESCENT VILLA", and "BLITHE AUTUMN Apartments". Each listing includes a photo, name, and a table of details.
- Deals:** A section showing a deal named "SOUTH DEAL" with a value of \$216,700.00 and a "Proposal/Price Quote" status.
- Invited Meetings:** A section showing a meeting named "NEGOTIATION 3" with a status of "Not Started" and a date of "09/09/2022 09:00 PM".

The interface is designed with a clean, modern look, featuring a dark blue header and a light blue sidebar. The "Before" and "After" labels indicate the redesign.

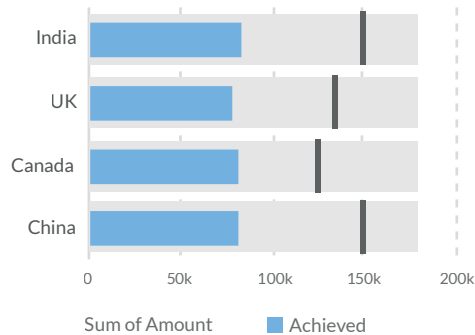
Builder Name	Eagle	Crescent	Autumn
Project Status	Completed	Construction	Completed
Base Price per Sq.ft	\$ 92.00	\$ 180.00	\$ 110.00
	\$211,600.00	\$ 342,000.00	\$ 130,000.00

Host	Dusan Messi
Status	Not Started
From	09/09/2022 09:00 PM

# Reports and Dashboards

Accelerate your business with a powerful analytics tool that paints a picture of your past, current and future performance.

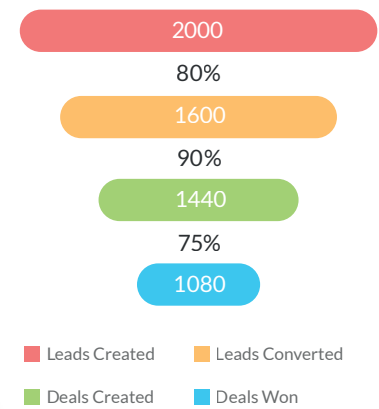
## Global Sales 2022



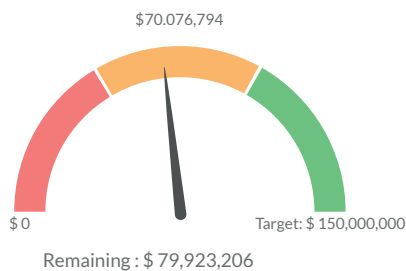
## Industry-wise comparator

	Finance	Retail	Insurance
Deals won	62 <span>47.6%</span>	206 <span>42.1%</span>	230 <span>198.7%</span>
Deals open	296 <span>0.3%</span>	823 <span>10.9%</span>	617 <span>37.1%</span>
Deals lost	42 <span>28.8%</span>	114 <span>38%</span>	104 <span>30.2%</span>

## Lead conversion analytics



## Asia target



## Europe Sales 2022

1. Poland	\$6,271.674
2. France	\$4,225.827
3. Spain	\$3,551.238
4. Germany	\$2,960.810
5. Netherlands	\$2,574.661
6. Italy	\$2,276.754

## Revenue this month

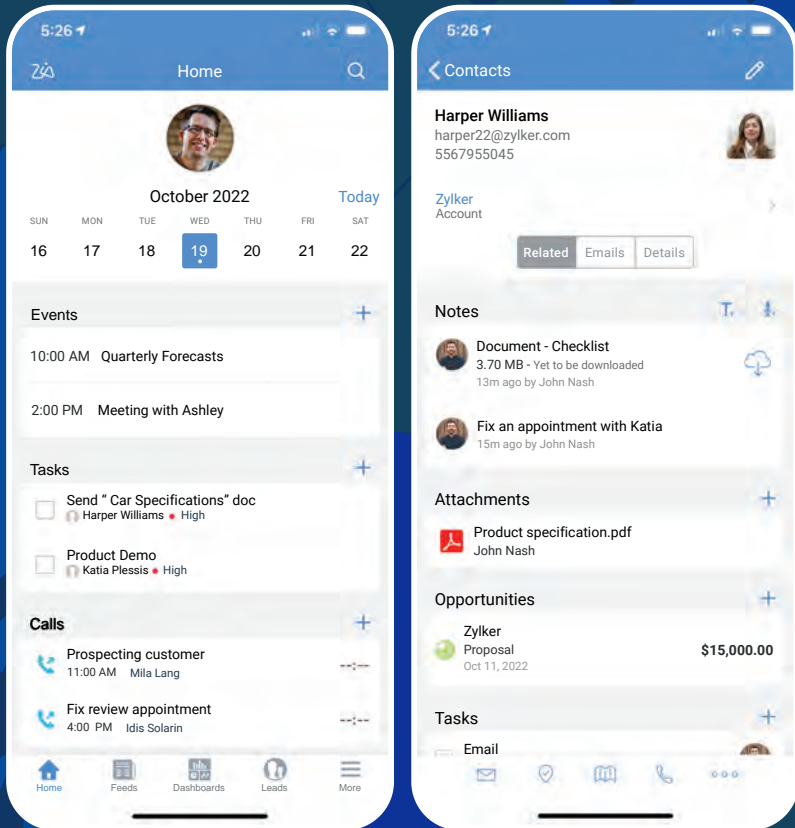
\$107,509.00 284.6%

Last year: \$27,952.00



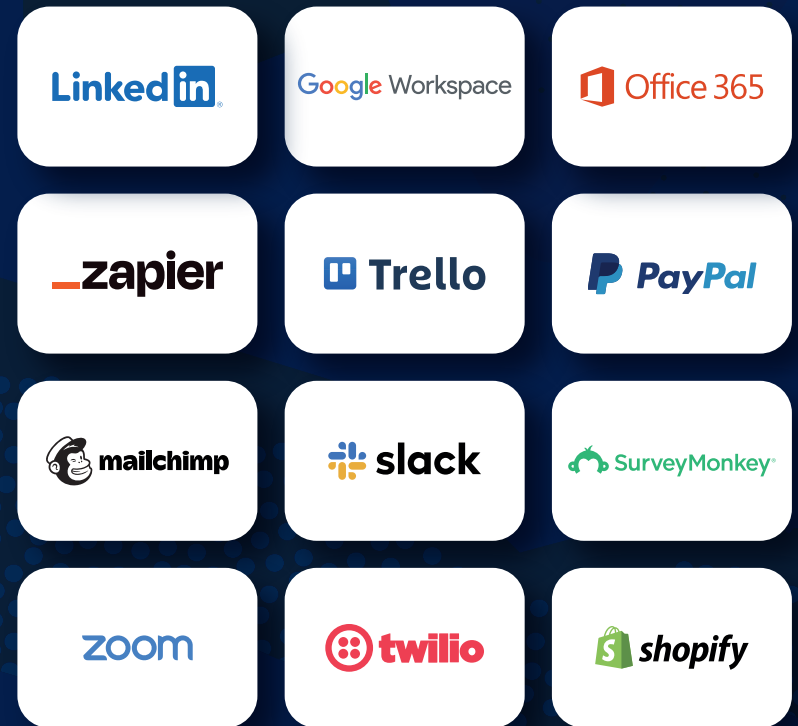
# Fully mobile

Stay on top of your business wherever you go with Zoho CRM mobile apps.



# Integrations

500+ native integrations with top business apps.





Email Us:  
**[hello@arisesolutions.co.nz](mailto:hello@arisesolutions.co.nz)**

Call Us:  
**+64 3 977 7222**

Website:  
**[arisesolutions.co.nz/zoho-crm](https://arisesolutions.co.nz/zoho-crm)**