

Zoho MeetUp!

Istanbul Kullanıcı Grubu



Yeni Zoho CRM Özellikleri ve
Diğer Zoho Güncellemeleri



Cloudyflex

Son Buluşmamızdan Bu Yana Zoho CRM'e Gelen Özellikler

- ◆ (2021) Özel CRM Ekran Tasarımı İçin Canvas Dizayn Stüdyosu
- ◆ (2020) RFM Model Segmentasyon
- ◆ (2020) Cohort & Quadrant Analizleri
- ◆ (2020) Multiple Sales Pipeline – Çoklu Satış Hunileri
- ◆ (2020) Web Form Analizleri ve A/B Testleri
- ◆ (2020) Diğer Güncellemeler
- ◆ (2020) Satış Rotası Yönetimi : Zoho RouteIQ
- ◆ (2020) Zoho CRM Analytics App
- ◆ KVKK Geliştirmeleri ve İYS Entegrasyonları
- ◆ Ödüller & Analist Raporları

Sürekli Kendini Geliştiren Zoho CRM

2015 Model Zoho CRM



2017 Model Zoho CRM

The 2015 Zoho CRM interface features a top navigation bar with 'Home', 'Leads', 'Accounts', 'Contacts', 'Potentials', 'Reports', and 'Activities'. Below this is a search bar and a 'Send Mail' button. The main area displays a table of leads with columns for 'Lead Name', 'Company', 'Phone', and 'Email'. The table contains several entries, including 'Damian House', 'Yao Page', 'Evelyn Francis', 'Madison Madison', 'Rylee Madison', 'Kelko Parks', 'Margaret Hopper', 'Lamar Buckley', 'Colt Fry', and 'Dieter Carpenter'. At the bottom, there is a pagination bar showing '18 Records per page' and 'Total Count: 1 to 10'.

The 2017 Zoho CRM interface shows a detailed view of a customer, 'Quinn Rivers'. The top navigation bar includes 'Home', 'Feeds', 'Leads', 'Accounts', 'Contacts', 'Deals', 'Activities', 'Reports', 'Dashboards', and 'Visits'. The main content area is divided into several sections: 'Customers' (listing 'Quinn Rivers', 'Tai Chang', 'Allen Kreger', 'Dave Alton', and 'Jeff Smith'), 'Zyker - Home' (showing 'Pages visited: 7' and 'Time spent: 77.36 mins'), and a 'Pages Visited' table. The 'Pages Visited' table has columns for 'Actions', 'Pages', 'Time Spent (mins)', and 'Time'. The right sidebar contains 'Info', 'Conversations', and 'Timeline' sections, showing contact details for 'Quinn Rivers' and a list of recent visits from 'Chloe Reese' and 'Visitor 80578'.

Sürekli Kendini Geliştiren Zoho CRM

2021 Model Zoho CRM

Zoho CRM'e her yıl gelen **güncellemeler ücretsizdir.** Yeni özellikler herhangi bir ekstra ücret talep edilmeden **tüm müşterilerin hesaplarına otomatik olarak eklenir.**

The screenshot displays the Zoho CRM interface for a user named Melinda Anderson, Strategy Associate. The interface is divided into several sections:

- Profile Overview:** Includes a profile picture, name, and title. Below this are tabs for Overview, Notes, Timeline, Emails, Social, Closed Activities, and All Fields. A 'Send Email' button is visible.
- About Section:** A blue sidebar containing account information:

Account Name	Affinity Estates
Department	Planning and Management
Email	melindanderson@affinityest.com
Phone	(202)416-1621
Mobile	(202) 505-6757
Lead Source	Partner
Contact Owner	Dusan Messi
Last Activity Time	10/27/2020 06:49 PM
- Properties Section:** A grid of property listings with images and details:

Property Name	Builder Name	Project Status	Base Price per Sq.ft
GOLDEN EAGLE COTTAGE Individual hour	Eagle	Completed	\$ 92.00
AZURE CRESCENT VILLA Villa	Crescent	Construction	\$ 180.00
BLITHE AUTUMN Apartments	Autumn	Completed	\$ 110.00
- Open Activities, Deals, and Invited Meetings:** Three sections at the bottom showing active tasks, deals, and meetings.

Zoho CRM Canvas Stüdyosu (2021)

Melinda Anderson
Strategy Associate

About

Account Name: Affinity Estates
Department: Planning and Management
Email: melindanderson@affinitywa.com
Phone: (206)414-1631
Mobile: (206) 505-4737
Lead Source: Partner
Contact Owner: Duane Moss
Last Activity Time: 10/27/2020 - 06:49 PM

Properties

Property Name	Builder Name	Project Status	Base Price per Sq Ft
GOLDEN EAGLE COTTAGE (Individual Home)	Eagle	Completed	\$92,000
AZURE CRESCENT VILLA (Vila)	Crescent	Construction	\$180,000
BLITHE AUTUMN (Apartments)	Autumn	Completed	\$110,000

Open Activities | **Deals** | **Invited Meetings**

Blue Crescent Villa
Spokane, Washington

PRICE: \$85,000
3BHK, 1350 sq ft

CONTACT DETAILS
Bennett Holdings
bennett@bennetholdings.com
509.455.5050

Property Details
Floor Plan | Quizzes | Emails | Visits

3BHK Villa
Property type: Vila
Sale area: 1350 sq ft
Built-up area: 1500 sq ft

AMENITIES
Power Backup
Rain Water Harvesting
House Keeping
Security

Zeus Watch Series 3 GPS - Multiple straps, Space Gray steel case. (UK edition)

4.2/5 rating - 2,723 ratings (691 reviews)
Availability: 203 Inventory
Best Price: **\$1,250**

Seller Details
Product Owner: Tony M Balle
Phone: 443 235 9020
Email: tony@m3digital.com

Services
1 Year mobile phone warranty
2 Year Hardware warranty
Bank Delivery Offers Available

Highlights
GPS and Bluetooth
Waterproof
Smart Music Player
Breathable Strap
Notification
Battery Runtime Update Status

Power for the whole day
Zeus Watch Series 3 has a 4-day battery life and a 1.28-inch LCD display. You can track your health goals, view notifications, make calls, and more, without the need for a power outlet!

Make payments with NFC
Series 3 brings NFC to the smartwatch arena. Make payments on-the-go effortlessly with the Zeus watch. (NFC payments require your phone to be unlocked).

Your emergency assistant
Built with a heart rate sensor and blood oxygen sensor, Zeus Watch Series 3 monitors your vitals continuously, and sends SOS push notifications when something's not right.

Change track from the wrist
Zeus Watch Series 3 packs a revolutionary watchOS, compatible with popular music players. Listen to the right song, at the right volume that complements your workout.

Todd Hernandez
Male | 10 - June 2, 1972

History
Patient has submitted their CT scan. Anesthesia products. 11 Jun 2020
Dr. Grant will be available. Patient ready for CT scan. Reason: Asymptomatic. 11 Jun 2020
Patient ready to be checked. Reason: Subcutaneous. 11 Jun 2020
Diabetes report to be sent via email. Item to patient. 11 Jun 2020

Documents

File Name	Uploaded by	Updated Date	Clearance
CT Scan.jpg	Pravin, 3328	18 Jun 2020	Pending
Health report.jpg	Dr. Grant, 5022	18 Jun 2020	Verified
Prescription.jpg	Ernest, 3221	12 May 2020	Verified
Electrocardiogram.jpg	Pravin, 3328	12 Apr 2020	Pending
Diabetes report.jpg	Dr. Grant, 5022	12 Apr 2020	Verified
Prescription.jpg	Pravin, 3328	12 Apr 2020	Verified

Mini Cooper - Vintage Car
Status: Excellent | Source: Partner

ASSET DETAILS
Asset Name: Mini Cooper - Vintage...
Product ID: HIC74K
Color: White
Registered: 7
Warranty Status: Available
Mileage: 250
Engine: 100

PRODUCT IMAGE

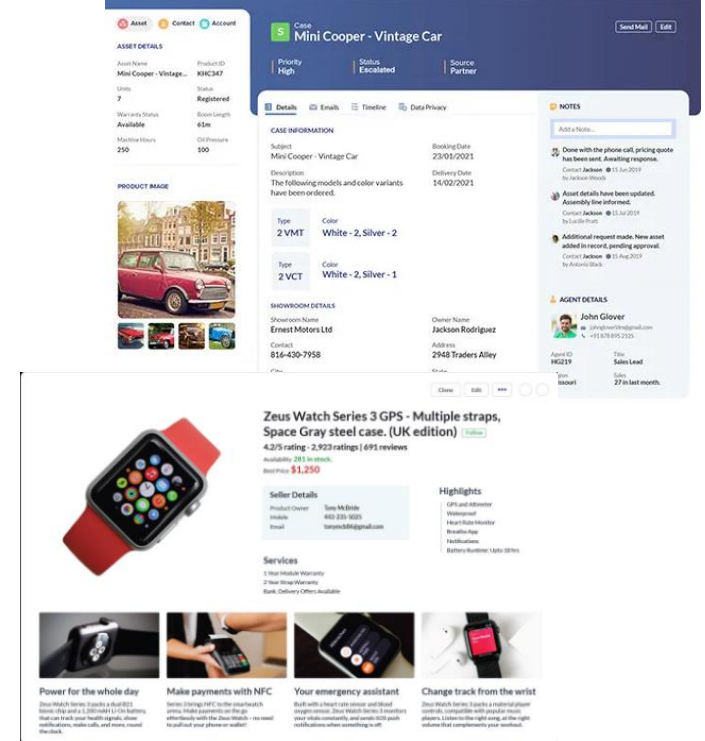
CASE INFORMATION
Subject: Mini Cooper - Vintage Car
Description: The following models and color variants have been ordered.
Type: 2 VMT | Color: White - 2, Silver - 2
Type: 2 VCT | Color: White - 2, Silver - 1

ROOMBOOK DETAILS
Owner Name: Ernest Motors Ltd
Address: 2943 Traders Alley
Contact: 816-400-7958
City: Archie
State: Missouri

Zoho CRM Canvas Stüdyosu (2021)

Canvas Stüdyo ile faydalanacağınız noktalar;

- ◆ Sektöre özel CRM Ekran tasarımları
- ◆ Takımlara özel CRM Ekran tasarımları
- ◆ Çalışanlar adına daha yüksek CRM adaptasyonu imkanı
- ◆ Basit arayüzü ile hızlı implementasyon imkanı
- ◆ Canvas Stüdyo Endüstrideki tek örnek, Zoho CRM dışında başka hiçbir CRM Sisteminde yok.



10 Dakikada Canvas Tasarım



RFM Model Müşteri Segmentasyonu (2020)

The screenshot displays a CRM interface for a customer named 'Wills'. The 'Segmentation' section shows the following data:

Segment Label	Recency	Frequency	Monetary	Action
Loyal	2 13/06/2018	4 5	4 \$ 67000	View History

The 'Notes' section contains the following text:

Wants to know if we have any best offers coming up.

Contact - [Wills](#) · [Add Note](#) · [🕒](#) now by Philip

RFM Model Müşteri Segmentasyonu (2020)

Recency	Frequency	Monetary
Score	Criteria	
5	1 Sale Closing Date BETWEEN Aug 1, 2019, Aug 10, 2019 2 OR Sale Closing Date IS Last Month	
4	1 Sale Closing Date IS Till Yesterday	
3	1 Sale Closing Date IS BEFORE Jul 1, 2019	
2	1 Sale Closing Date AGE IN DAYS = 60	
1	1 Sale Closing Date IS EMPTY	

Recency : En son alışveriş tarihi

Recency	Frequency	Monetary
	Score	Criteria
	5	1 Number of purchases < 8
	4	1 Number of purchases BETWEEN 5, 10
	3	1 Number of purchases < 5
	2	1 Number of purchases BETWEEN 1, 2
	1	1 Number of purchases IS EMPTY

Frequency : Satın alma sıklığı

Recency	Frequency	Monetary	
		Score	Criteria
		5	1 Amount > 1500
		4	1 Amount BETWEEN 800, 1200
		3	+ Add Criteria
		2	+ Add Criteria
		1	+ Add Criteria

Monetary : Satış tutarı

Örnek Segmentasyon

Segmentler	RFM Puanları
Şampiyon	R : 4-5 / F : 4-5 / M : 4-5
Sadık Müşteri	R : 2-3 / F : 4-5 / M : 4-5
Yeni Müşteri	R : 1 / F : 4-5 / M : 4-5
Potansiyel Müşteri	R : 3 / F : 1-2 / M : 1
İlgi Bekleyen Müşteri	R : 2-3 / F : 2-3 / M : 4-5
Uzun Süredir Hareketi Olmayan Müşteri	R : 2-3 / F : 1 / M : 2-3
Kaybedilmemesi Gereken Müşteri	R : 1 / F : 4-5 / M : 4-5
Kaybedilmiş Müşteri	R : 1 / F : 1 / M : 1

Cohort Analizler (2020)

DAY-WISE SALES COHORT

Created Time	Record Count	Cohort Duration(In Days)		
		1	2	3
31/03/2019	100	12	18	20
01/04/2019	120	29	15	22
02/04/2019	90	17	25	30
03/04/2019	110	20	22	18
04/04/2019	130	10	15	22

Basic

SALES COHORT FOR LEAD SOURCES

Lead Source	Record Count	Cohort Duration(In Years)		
		1	2	3
Facebook	100	12	18	20
Webinar	120	29	15	22
Trade Show	90	17	25	30
Cold Call	110	20	22	18
Referral	130	10	15	22

SALES COHORT FOR LEAD SOURCES

Lead Source	Record Count	Cohort Duration (In Weeks)			Sum of Amount
		1	2	3	
Facebook	500	200	100	100	\$20,000.00
Referral	570	100	210	190	\$35,637.00
Webinar	230	70	100	30	\$149,300.00
Trade Show	840	190	270	300	\$230,600.00
Cold Call	970	500	270	130	\$520,350.00
Advertisement	860	190	270	300	\$260,000.00
Total	3970	1250	1220	1050	\$1,525,887.00

Created Time	Record Count	Last Activity Time from Created Time in Weeks										Average R...
		1	2	3	4	5	6	7	8	9	10	
June 2019	447	15	12	23	43	99	88	67	45	33	22	\$225,000.00
July 2019	476	32	65	21	87	56	43	22	98	12	40	\$556,500.00
August 2019	419	23	25	55	34	12	65	23	67	66	49	\$876,050.00
September 2019	438	32	22	11	34	66	43	29	76	81	44	\$435,550.00
November 2019	523	43	22	16	78	62	90	87	33	71	21	\$555,600.00
Total	2303	145	146	126	276	295	329	228	319	263	176	\$2,648,700.00

Cohort Analizler (2020)

Cohort modeli üzerinden hangi analizler yapılır?

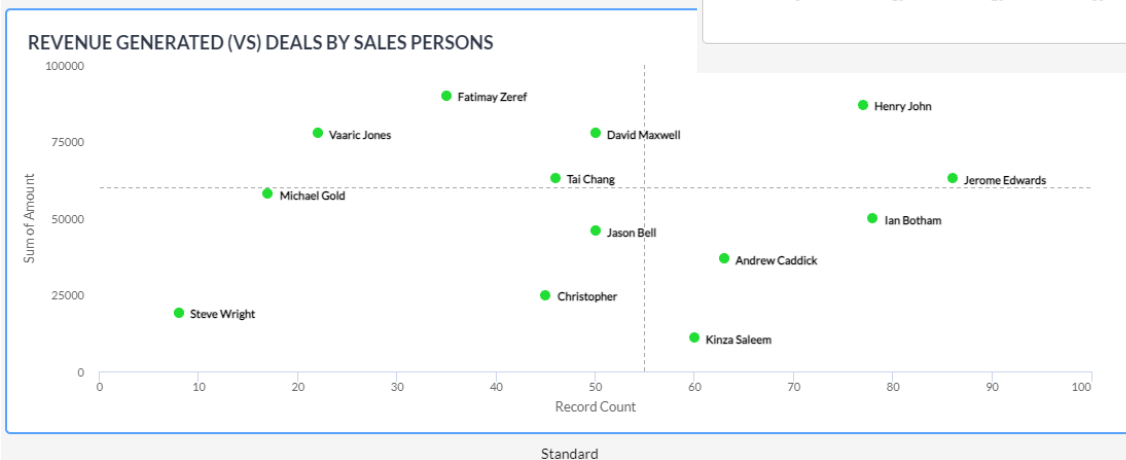
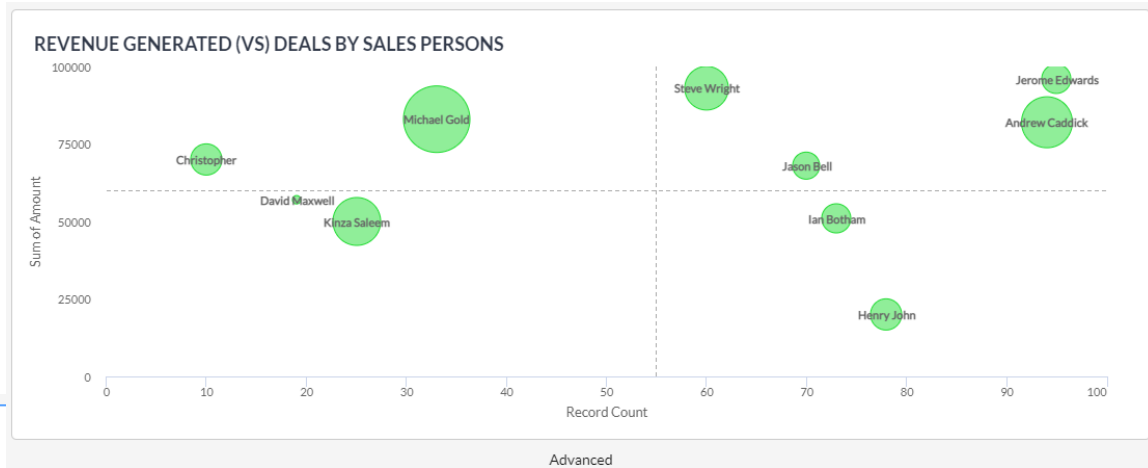
- ◆ Satış trendi analizi
- ◆ Satış, çağrı ve aktivite kapama hızları ve analizleri
- ◆ Zaman aralığı analizleri

SALES COHORT FOR LEAD SOURCES

Lead Source	Record Count	Cohort Duration (In Weeks)			Sum of Amount
		1	2	3	
Facebook	500	200	100	100	\$20,000.00
Referral	570	100	210	190	\$35,637.00
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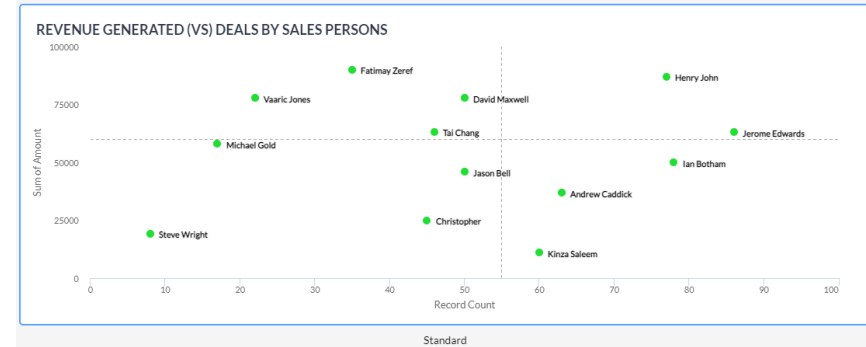
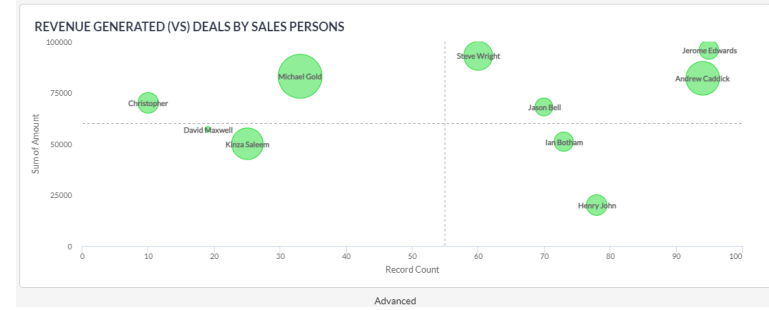
Quadrant Analizler (2020)



Quadrant Analizler (2020)

Quadrant modeli üzerinden hangi analizler yapılır?

- ◆ Satış takımı performans analizi
- ◆ Bölge analizleri
- ◆ Pazarlama kampanya performans analizleri



Çoklu Satış Hatları (2020)

Pipelines

This page allows you to manage various sales processes by organising the Deal stages in different pipelines.

Layout

Standard(Standard) 9

- Qualification
- Needs Analysis
- Value Proposition
- Identify Decision Makers
- Proposal/Price Quote
- Negotiation/Review
- Closed Won
- Closed Lost
- Closed-Lost to Competition

[Add Stages](#)

New cars 6

- Requirement gathering
- Test drive and Car Selection
- Proposal/Price Quote
- Negotiation/Review
- Closed Won
- Closed Lost

[Add Stages](#)

Çoklu Satış Hatları (2020)

Yeni Arabalar	Kullanılmış Arabalar	Servis Talepleri
İhtiyaçların alınması	Kullanılmış modellerin gösterimi	Analiz Talebi
Test sürüşü ve araba seçimi	Test sürüşü ve araba seçimi	Tamirat Süreci (devam ediyor)
Teklif Süreci	Teklif Süreci	Kontroller ve test sürüşü
Pazarlık Süreci	Pazarlık Süreci	Faturalama Süreci
Kazanıldı/Kaybedildi	Kazanıldı/Kaybedildi	Servis talebi kapatıldı

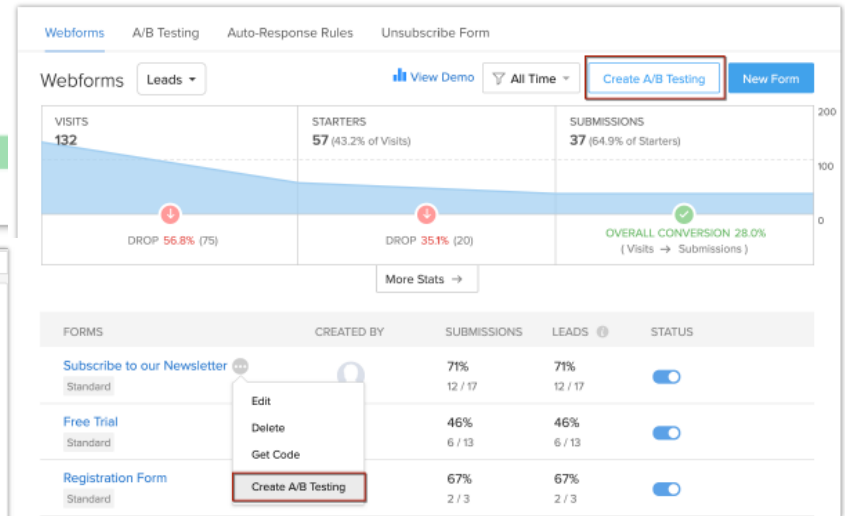
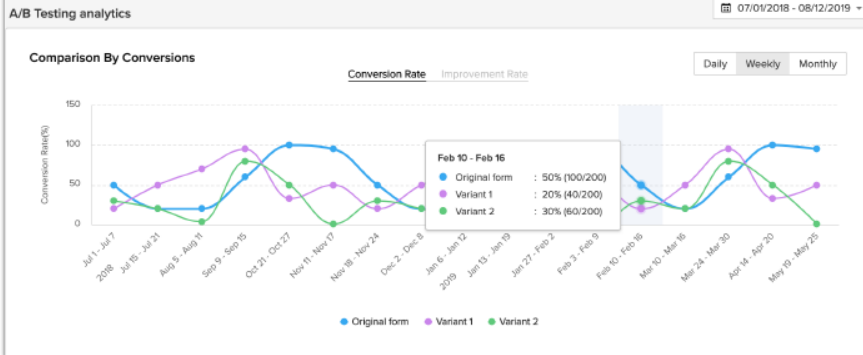
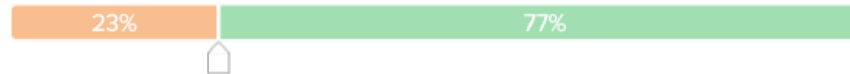
Web Formları İçin A/B Testi (2020)

Test Sampling

Set % of visitors to be included in the A/B Testing Experiment %

Split Visitors

● Original form (23%) ● Variant (77%)



Diğer Güncellemeler (2020)

- ◆ İleri Seviye Süreç Yönetimi
- ◆ İleri Seviye İnceleme/Onay Süreçleri
- ◆ E-Mailler İçin İş Akışları
- ◆ İş Akışı Kullanımı Raporları
- ◆ E-Mail İçin Zia (Yapay Zeka)
- ◆ Diğer Yapay Zeka Geliştirmeleri

2020 yılında gelen tüm güncellemeleri detaylı olarak incelemek için

<https://www.zoho.com/crm/help/2020>

[-release-features.html](https://www.zoho.com/crm/help/2020-release-features.html) sayfasını

inceyebilirsiniz.

Güncellemeleri Canlı Demo Hesabı Üzerinden Anlattığımız Webinarlarımız

2020 Özellikler 1.Bölüm – 54 Dakika

- Zoho CRM Web to Lead Formları Raporları Zoho
- CRM Web to Lead Formları üzerinde A/B Testing
- Zoho CRM Workflow/İş Akışı Kullanım Raporları
- Zoho CRM Multiple Sales Pipeline/Çoklu Satış Hunileri

2020 Özellikler 2.Bölüm – 67 Dakika

- Cohort Analizleri
- Quadrant Analizleri
- Wizards ile Özel Süreçlere Sahip Ekranlar Tasarlama



ZOHO CRM
Erken Erişim
Özellikleri Webinar
Serisi #1
Günün Programı

- Web to Lead Formları Raporları
- Web Formları İçin A/B Testing
- Workflow Kullanım Raporları
- Çoklu Satış Hunileri / Multiple Sales Pipeline
- Soru & Cevap

Buse Özbilgiç
Zoho Çözüm Danışmanı

Seyal Koca
Zoho Çözüm Danışmanı

Zoho CRM



ZOHO CRM
Erken Erişim
Özellikleri Webinar
Serisi #2

Konu:

- Dashboards - Cohort Analizleri
- Dashboards - Quadrant Analizleri
- Wizards ile Özel Ekran Tasarımı

19 Haziran Cuma 11:00

Buse Özbilgiç
Zoho Çözüm Danışmanı

Seyal Koca
Zoho Çözüm Danışmanı

Zoho CRM

Canlı Demo Anlatımlı Webinar Özeti

2020 Özellikler 3.Bölüm – 51 Dakika

- RFM Model Müşteri Segmentasyonu
- Diğer 2020 Zoho CRM Özellikleri

2021 – Zoho CRM Canvas Stüdyo – 55 Dakika

- Zoho CRM Canvas Dizayn Stüdyosu ile Özel Tasarım CRM Ekranları Oluşturma



ZOHO CRM
Erken Erişim
Özellikleri Webinar
Serisi #3

Konular

- RFM Model Pazarlama Segmentasyonu
- Zoho CRM 2020 - Canvas Akıllı Yeni Özellikler

9 Temmuz Perşembe 11:00

[Kayıt Ol](#)

Denizhan Şahinoğlu
Operasyon Yöneticisi

Enver Türe
Müşteri İhtiyaçları Yöneticisi

Zoho CRM



Canvas | Zoho CRM
Özel Tasarım CRM
Ekranları Oluşturma

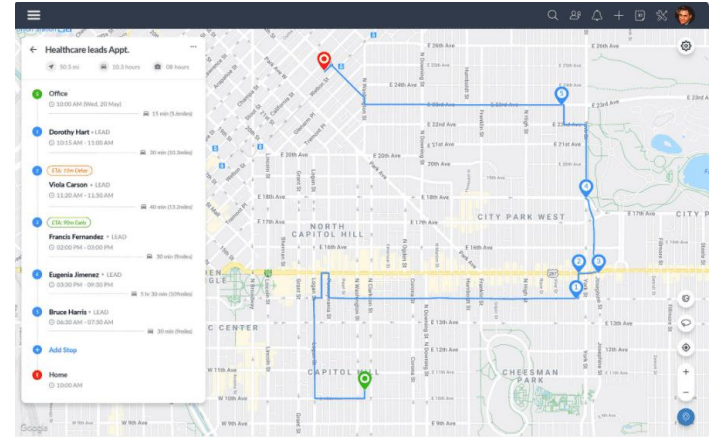
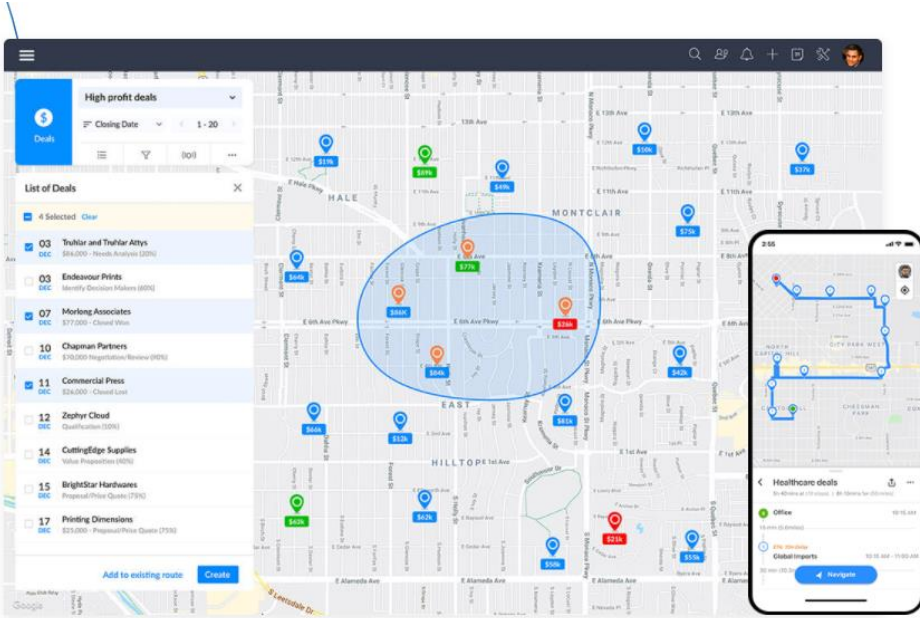
2021 yılının en büyük Zoho CRM güncellemesi, Canvas Dizayn Stüdyosunu sizin için canlı hesap üzerinden anlatacağız!

Denizhan Şahinoğlu
Operasyon Yöneticisi

Enver Türe
Müşteri İhtiyaçları Yöneticisi

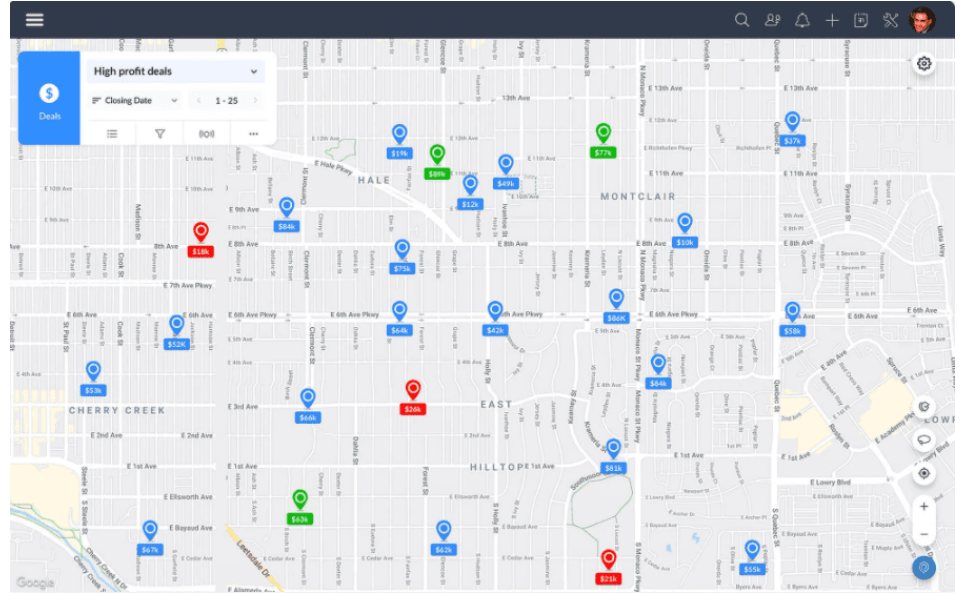
Zoho CRM

Satış Rotası Yönetimi : Zoho RouteIQ

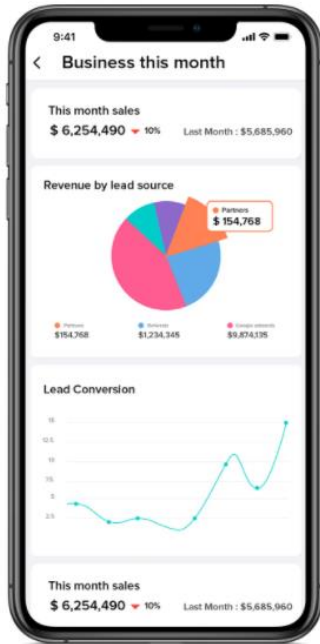


Satış Rotası Yönetimi : Zoho RoutelQ

- ◆ Zoho RoutelQ, Zoho CRM'e eklenti niteliğinde Zoho'nun geliştirdiği bir uygulamadır.
- ◆ Zoho CRM Lisanslarına dahil değildir. Lisanslaması ayrı yapılır.



Zoho CRM Analytics App (2020)



Zoho CRM Analytics App (2020)

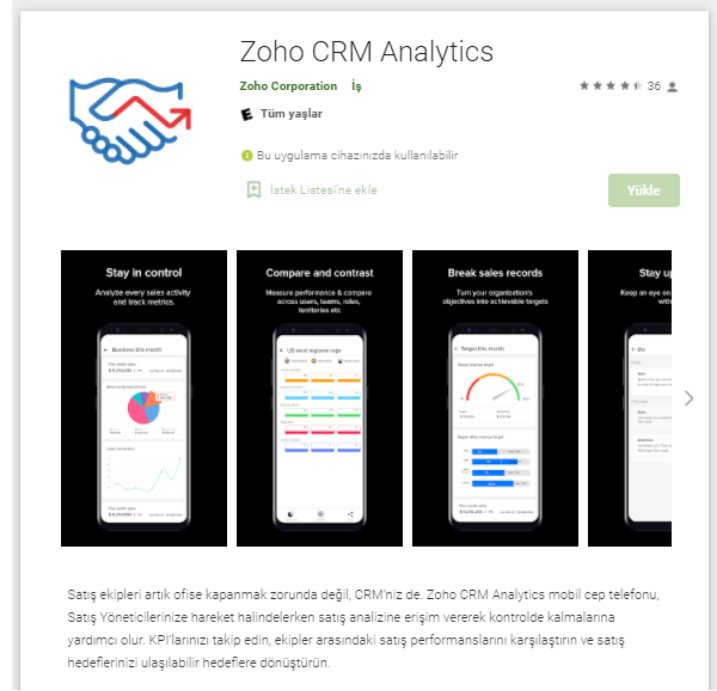
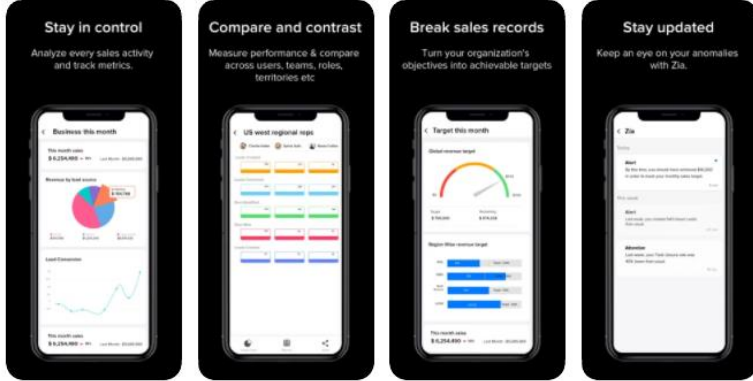


Zoho CRM Analytics App

Get in-depth sales analytics
Zoho Corporation

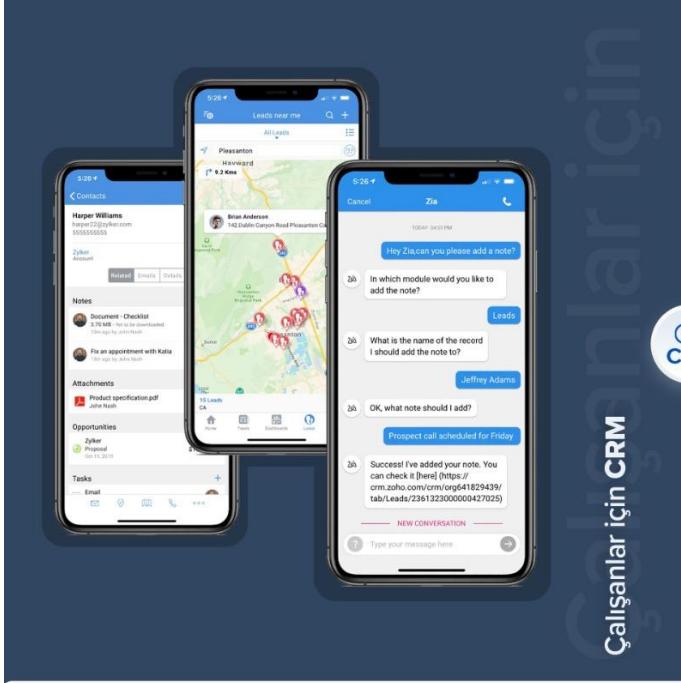
Free

iPhone Screenshots



Satış ekipleri artık ofise kapanmak zorunda değil, CRM'niz de. Zoho CRM Analytics mobil cep telefonu, Satış Yöneticilerinize hareket halindederken satış analizine erişim vererek kontrolde kalmalarına yardımcı olur. KPI'lerinizi takip edin, ekipler arasındaki satış performanslarını karşılaştırın ve satış hedeflerinizi ulaşılabilir hedeflere dönüştürün.

Zoho CRM Analytics App (2020)



KVKK Geliřtirmeleri ve İYS Entegrasyonları

Sayın Denizhan Sahinoglu - Deneme Silebilirsiniz

Send Email Convert Edit New Appoint... ⋮

Overview Timeline Data Privacy Last Update : 65 day(s) ago

Lead Intelligence Done Date 20/05/2021 14:16

Açıklama Bilgi

Description	Deneme Silebilirsiniz	Account Intelligence	-
Contact Intelligence	-		

İYS İzin Alanları

Telefon İzni	-	Email Opt Out	✓ ⓘ
SMS İzni	-	İYS Güncelleme	-

İlgilendiđi Konular

ZohoProductsPotential	-	Interested Areas Zoho	-
-----------------------	---	-----------------------	---

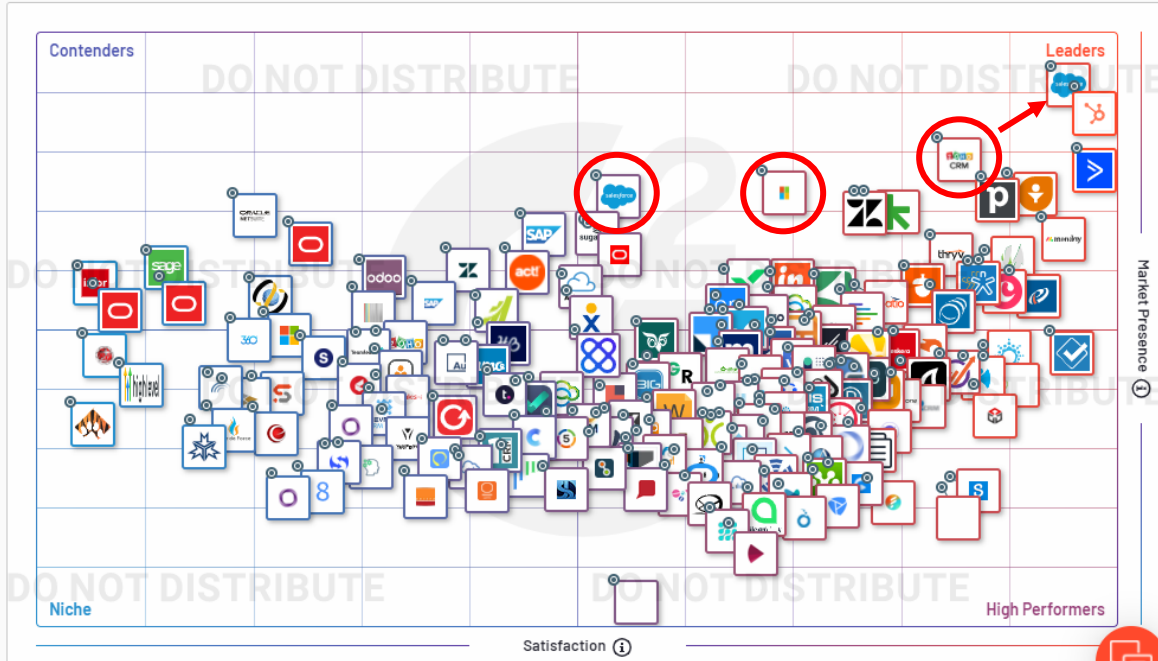
Pazarlama Alanları

İYS Modülleri

Müşteri verisi içeren fotoğraflar kaldırılmıştır.

Ödüller ve Analist Raporları

Grid® for CRM Software



Ödüller ve Analist Raporları

Gartner®

Zoho is named a Challenger in the 2020
Gartner Magic Quadrant for Sales Force
Automation



— 2020 Gartner Magic Quadrant —

CHALLENGER

Zoho is named a Visionary in the 2020
Gartner Magic Quadrant for CRM Lead
Management

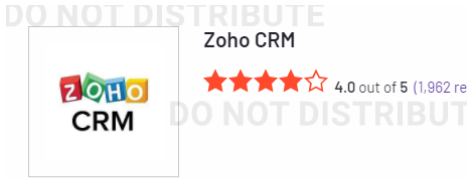


— 2020 Gartner Magic Quadrant —

VISIONARY



Ödüller ve Analist Raporları – Zoho CRM 2021 Güncel İstatistikler



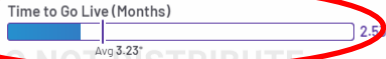
Implementation Score



Implementation Data



Average Months to Go Live



Satisfaction Ratings



*N/A is displayed when fewer than five responses were received for the question.



Kaynak : <https://www.g2.com/reports/85f2fd69-53a4-4040-a359-454d41afb4dd/preview?tab=profile-zoho-crm>

Kaynak : <https://www.g2.com/reports/958d21be-8afa-4848-bf45-b3052345c413/preview?tab=profile-zoho-crm>



Sıradaki Sunumlar

- ◆ Zoho CRM WhatsApp Entegrasyonu – Wappflex
- ◆ Zoho SalesIQ 2.0 Güncellemeleri ve Kodsuz Chatbot Geliştirme Arayüzü