



We stopped counting at 20+ years of experience.



We stopped counting at 20+ years of experience.

*What can you do to **have a project succeed**?*

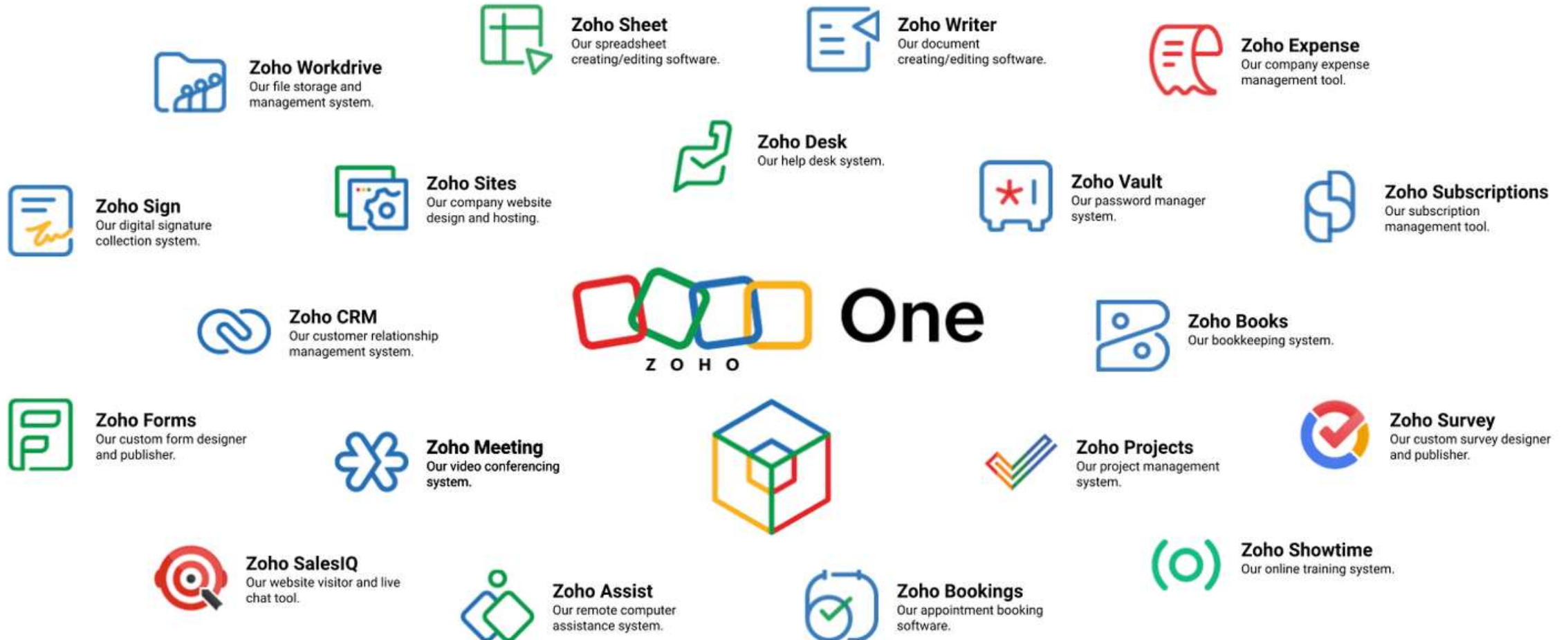
- Don't have Under-Commitment for a Project
- Avoid The Fear-of-Change Syndrome
- Not Having Executive-Level Buy-in will **doom** a project
- Plan on **attending** Formal Training with Employees
- Done is NOT Done – **continue** to improve and train



The OS for Business.

One Software Platform for Your Entire Business.

Zoho, the company, has 16,000 employees eating their own dog food.



Zoho One apps cover all your departments



Sales



Marketing



Support



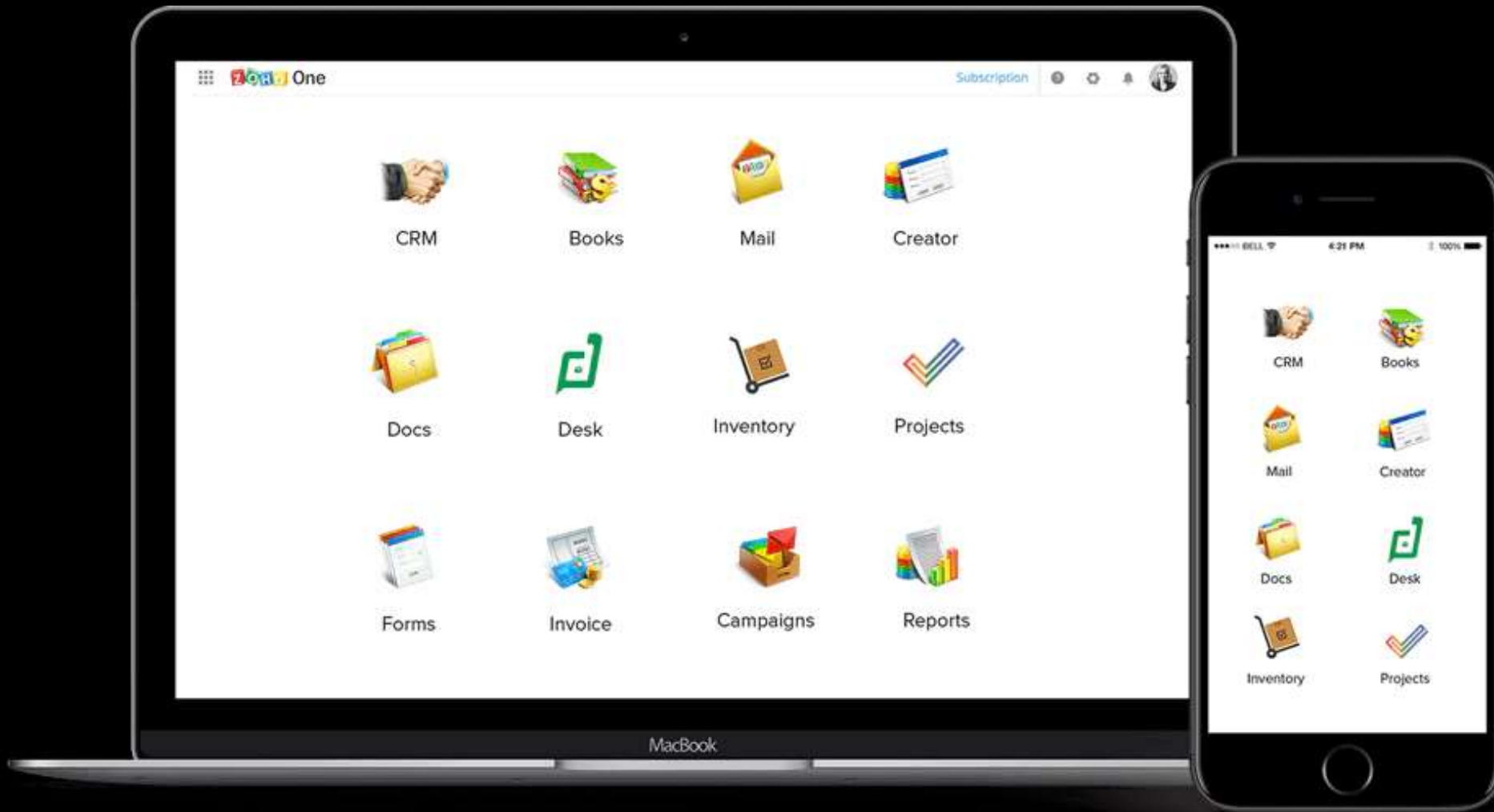
HR



Accounting



Operations



ZOHO One

Zoho One is a suite that includes 60+ well integrated, Enterprise Edition online apps with complimentary mobile and native versions.

- Web-based
- Mobile Ready
- No software to install
- Integrates with Gmail and Office 365
- 2500+ Marketplace apps and 3rd party integrations/add-ons



SALES

5 Accounts selected. [Clear](#) [Mass Update](#) [Change Owner](#) [Create Task](#) [⋮](#)

FILTER DEALS BY

Activities

Email Status

sent

In the last 2 days

and status is

opened

not opened

bounced

opened ar

Notes

Without A

In the last

Notes Add

Potential Na

Amount

Stage

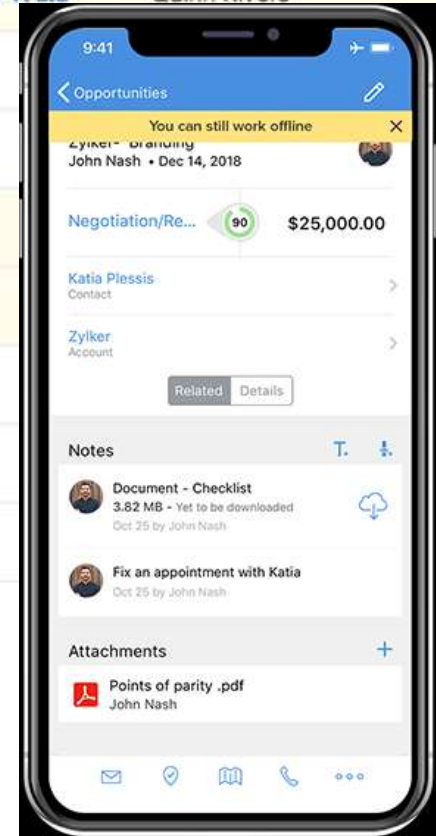
[Apply Filter](#)

DEAL NAME	VALUE	CLOSING DATE	ACCOUNT NAME	DEAL OWNER
25 Widgets	\$10,000	Aug 30	Smithson Publications	Quinn Rivers
1000 Widgets	\$4,000	Jul 27	Snow white Bakers	Quinn Rivers
60 Widgets	\$8,000	Aug 18	Tony And Presscott Pvt Ltd	Quinn Rivers
80 Widgets	\$11,000	Sep 10	Ventura Capitalists	
20 Widgets	\$6,000	Sep 20	Lawson Associates	
Value Proposition	00.00	Sep 22	Blue Rivers Pvt Ltd	
Closed Won	00.00	Jul 25	Happy Homes	
Id.decision Makers	00.00	Oct 10	Thomas Publishers	
Id.decision Makers	000.00	Oct 23	Treble Notes Inc	
Closed Lost	0.00	Nov 11	H I D Corporation	

CRM

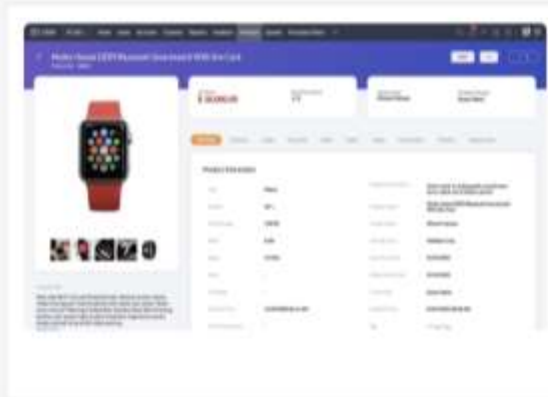
- Mass Update
- Change Owner
- Print Mailing Labels
- Mail Merge
- Share
- Revoke Sharing
- Delete

- *Zoho CRM has a multichannel approach to sales by leveraging live chat, email, calls, social media, and artificial intelligence.*
- *Generate Quotes and orders from templates from within the CRM.*
- *Use CRM pipeline for opportunities follow up automatically with “workflow” capabilities.*
- *This integrates with ALL business apps!*



Design *your* CRM for *your* industry

My Organization Canvas





Todd Hernandez

June 2, 1972 (63 years)
Male

Phone
070 4820 4376

MRN#
25AF-A5Wg

BEST TIME TO CONTACT

10:15 am in 30 min
Best time to call

Address

103 Souterhead Road Lower Boscawell
TR19 1QB

Email

toddhernandez123@gmail.com

Emergency Contact

Name **Mike Hernandez**
Relationship **Son**
Phone **077 6432 9935**

Last Encounter

19 Jul 2019 with Dr. Veera

History Insurance Appointments

Add History

- Patient has submitted their CT scan. Awaiting analysis.
 15 Jun 2019 · by [Martin Nichols](#)
- Dr. Grant visit concluded. Patient needs CT scan. Report updated.
 15 Jun 2019 · by [Martin Nichols](#)
- Patient made a visit for check up. Form submitted.
 15 Jun 2019 · by [Martin Nichols](#)
- Diabetes report has been verified, sent to patient.
 15 Jun 2019 · by [Martin Nichols](#)

Documents Activities Timeline Data Privacy

Upload File

File name	Uploaded by	Uploaded Date	Clearance
CT Scan.jpg	Mariam, 2322	15 Jun 2019	Pending
Health report.jpg	Dr. Grant, 0012	15 Jun 2019	Verified
Prescription.jpg	Emmanuel, 8221	02 May 2019	Verified
Dialysis report.jpg	Mariam, 2322	12 Apr 2019	Pending
Diabetes report.jpg	Dr. Grant, 0012	12 Apr 2019	Verified
Prescription.jpg	Anne, 6326	12 Apr 2019	Verified



Heart Rate

54 bpm



Temperature

97 c

Conditions

Type 2 Diabetes Mellitus

Moderate Chronic Obstructive
Pulmonary Disease

Medications

Avandia
BD Ultrfine Needles
Insulin
Lisinprol

Allergies

Penicillin
Sulfa

Doctors

Primary
Dr. Grant, 0012

On Record -
Dr. Emma, 0056 Dr. Alexis, 0069

The screenshot displays the SalesInbox CRM interface. On the left is a dark sidebar with a 'Compose' button and a list of folders including 'Inbox', 'Drafts', 'Sent', 'Trash', 'Unread', 'Important Info', 'Company Details', 'Personal', 'Useful Ideas', 'Sales & Marketing', 'Labels', 'Reminders', and 'Settings'. The main area is divided into four columns: 'DEALS', 'CONTACTS & LEADS', 'NOT IN CRM', and 'COLLEAGUES'. Each column lists email entries with sender names, subjects, and dates. Some entries in the 'DEALS' column include monetary values in green boxes. A search bar is at the top, and a user profile picture is in the top right. A black text box is overlaid on the left side of the main area.

Category	Sender	Subject	Date	Value
DEALS	David Miller	Request for Sample logo...	Yesterday	\$ 5,000.00
	Adam Johnson	Request for Sample logo...	Jul 12	\$ 5,000.00
	Martin Taylor	Reg. Price plans	Jul 12	\$ 4,000.00
CONTACTS & LEADS	Jeremy Watson	Product tour!	10:40 am	
	Maria Thomas	Demo request	Yesterday	
	Steve Johnson	Plans and benefits	Jul 06	
	Sandra Evans	Test upgrade?	Jun 04	
	Warren Hastings	Welcome onboarding	Jul 03	
NOT IN CRM	Donna Baker	Regarding product features	11:58 am	
	Sandra Evans	Tradeshow on 12/7/2016	10:20 am	
	Twitter	Follow James Carter on Twitter!	9:47 am	
COLLEAGUES	Robert Yonker, Me (2)	Re: Final Attempt	Yesterday	
	Jennifer from Zylker	Choose the right plan.	Jul 11	
	Elizabeth Leon, Me (2)	Re: Quick question	Jun 13	
	Manish Sharma	New Contact?	Jun 06	
	Rose Edward	Trying to connect	Jun 02	

SALES INBOX

Let me sing about our favorite CRM feature called SalesInbox.

The most recent email isn't always the most important. Especially in sales.

This feature parses emails into categories.

WORKFLOW RULES

Zoho CRM is equipped with predefined workflow actions such as updating fields, sending emails and scheduling tasks. Defining custom actions lets you meet specific business requirements such as notifying customers with personalized SMS texts for order confirmation, dispatch or delivery. Webhooks let users trigger actions in third-party apps on event occurrences and Zia, the AI assistant, helps analyze workflows further.

Workflow Rules

Workflow rules allow you to perform certain automatic actions on specific records based on filter criteria. Workflow automations can send emails, update fields, create records and much more.

ZIA'S SUGGESTIONS FOR YOU

Zia Suggested Workflow-1 for CONTACTS	Preview	Remove
Zia Suggested Workflow-2 for PRODUCTS	Preview	Remove
Zia Suggested Workflow-3 for LEADS	Preview	Remove

Zia Suggested Workflow 3 - For Leads ⓘ

Few of your routine activities can be automated. And you know what? It could save you "xx hours" of your sales person per week.

```
graph TD; A((WHEN TO EXECUTE)) --> B[Record Action -> Created or Edited]; B --> C{WHICH CONDITION TO MATCH}; C --> D[No of Employees >= 1000 AND Lead Owner CONTAIN'S Amelia Burrows, Tai Chang]; D --> E((WHAT ACTION TO PERFORM)); E --> F[Email Notifications - Branding Invitation];
```

[Create as Workflow](#)

REPORTS

No limits to what a report could look like.

Have them auto emailed to YOU!

Track Won and Lost deals.

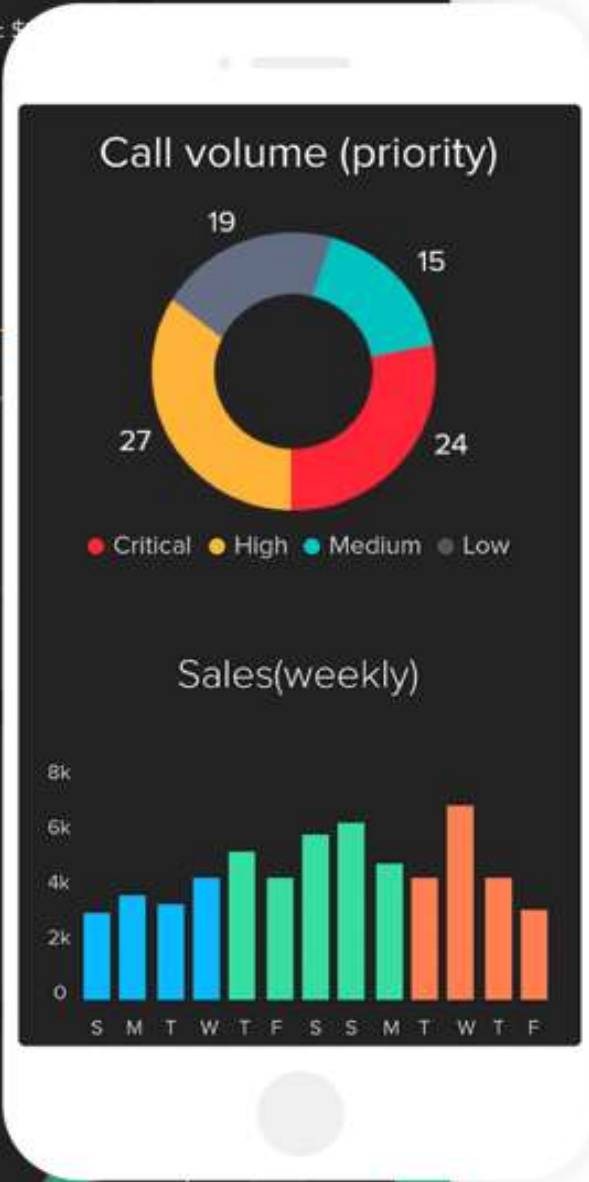
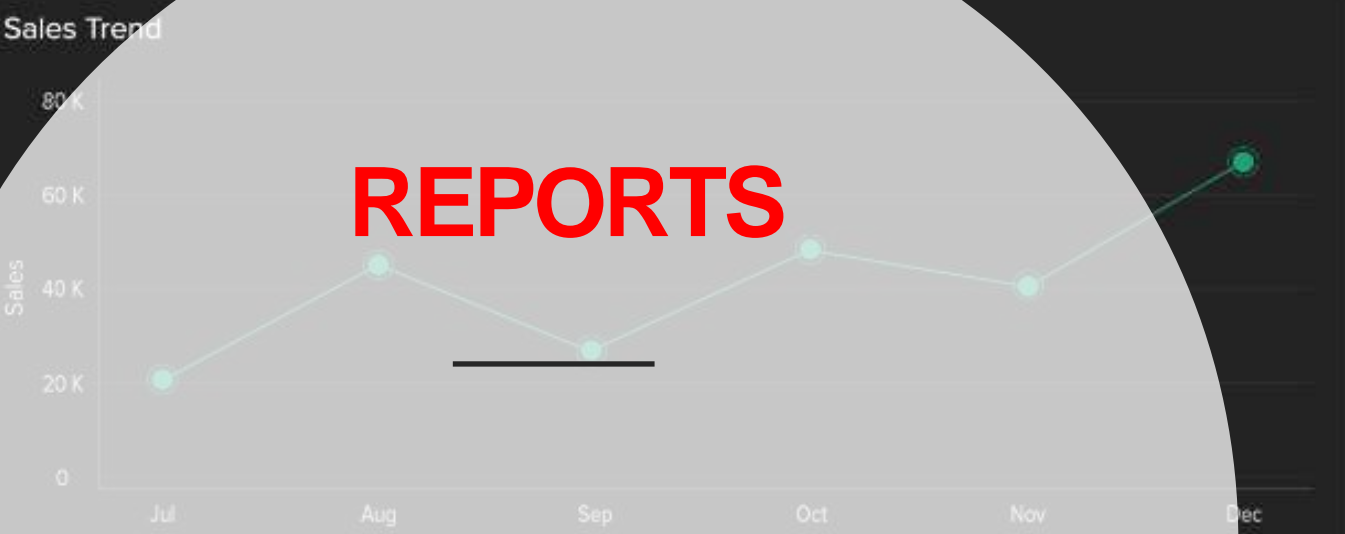
Track “why” deals are lost to look for trends.

REVENUE **\$13.2 M** ▲ Q3 2017: \$11.9 M

PROJECTED REVENUE **\$13.8 M** ▲ Q3 2017: \$11.8 M

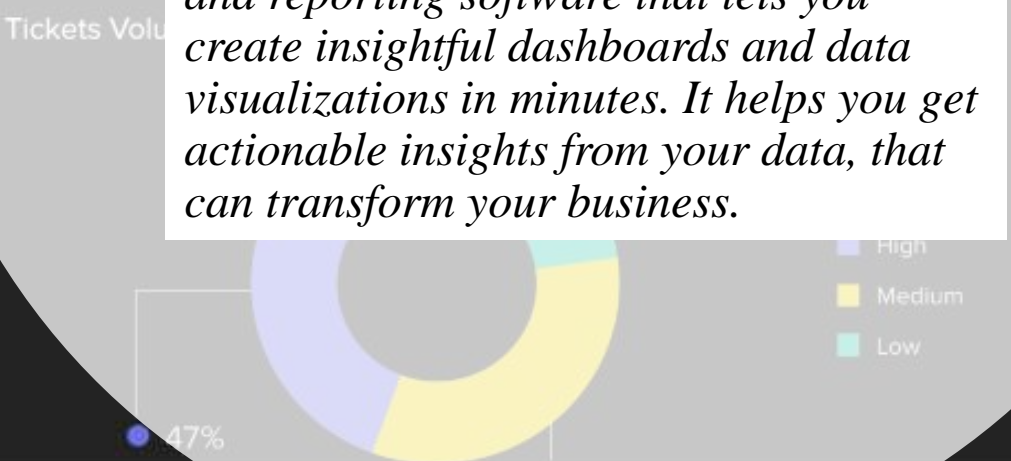
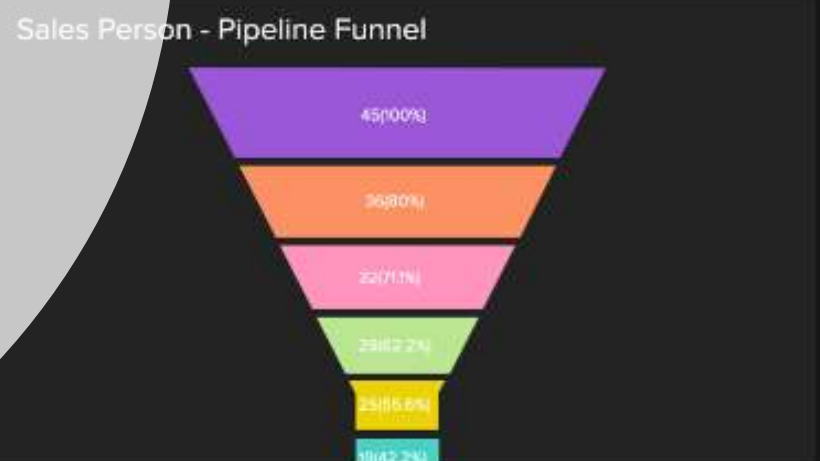
MARKETING EXPENSES **\$380 K** ▲ Q3 2017: \$

ACTIVE CUSTOMER



REPORTS

Zoho Analytics is a Business Intelligence and reporting software that lets you create insightful dashboards and data visualizations in minutes. It helps you get actionable insights from your data, that can transform your business.



Search [magnifying glass icon] [star icon] [up/down arrows icon]

Activities Overview

Me, 2 hrs ago

1486	1482	14	3.82	0.9%
------	------	----	------	------

CRM Analytics

Sales and Receivables

Me, 2 hrs ago

\$138K	14	\$12K	\$10,465K	231	869
--------	----	-------	-----------	-----	-----

CRM Analytics

Overview Dashboard

Me, 2 hrs ago

18	10	79.75
----	----	-------

Projects Analytics

Customer Analytics D...

Me, 2 hrs ago

324	175	98.12%	77.49%	71.30%
-----	-----	--------	--------	--------

DESK Analytics

Risk Dashboard

Me, 2 hrs ago

Projects Analytics

Tasks Dashboard

Me, 2 hrs ago

Projects Analytics

Closed Revenue

Me, 2 hrs ago

CRM Analytics

Sales Overview

Me, 2 hrs ago

CRM Analytics

Pipeline History

Me, 2 hrs ago

Financial Health Overview

Me, 2 hrs ago

533	401	132	9719%	7300%	105.52 hrs
-----	-----	-----	-------	-------	------------

Products & Inventory

Me, 2 hrs ago

5.68K	269	341	319	324	310
-------	-----	-----	-----	-----	-----

Time Tracking Dashb...

Me, 2 hrs ago

Customer & Revenue Dashboard

Deals Created

49↓

Sep 2018: 109

Won Deals

13↓

Sep 2018: 52

Tickets - This Month

533↓

Sep 2018: 539

Avg. Resolution Time (hrs)

105.52↓

Sep 2018: 175.48

Open Invoices Amount Oct 2018

\$578.71K▲

Sep 2018: \$505,06K

Avg First Reply Time (hrs)

69.81

Paid Invoices: Oct 2018

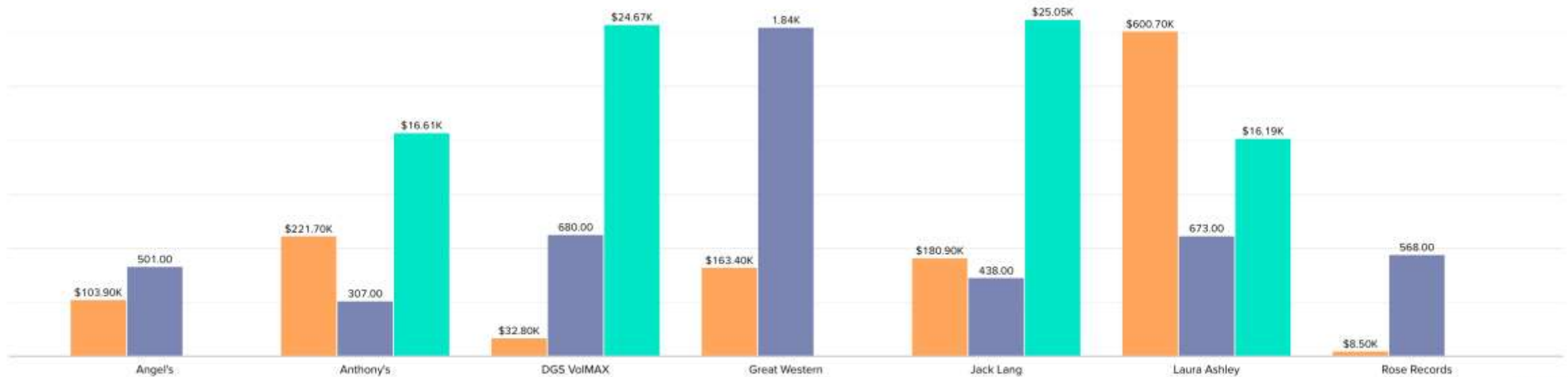
\$469.49K↓

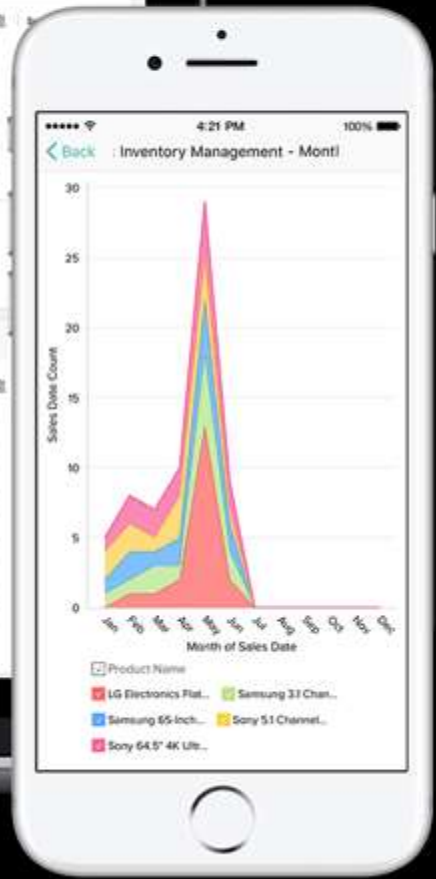
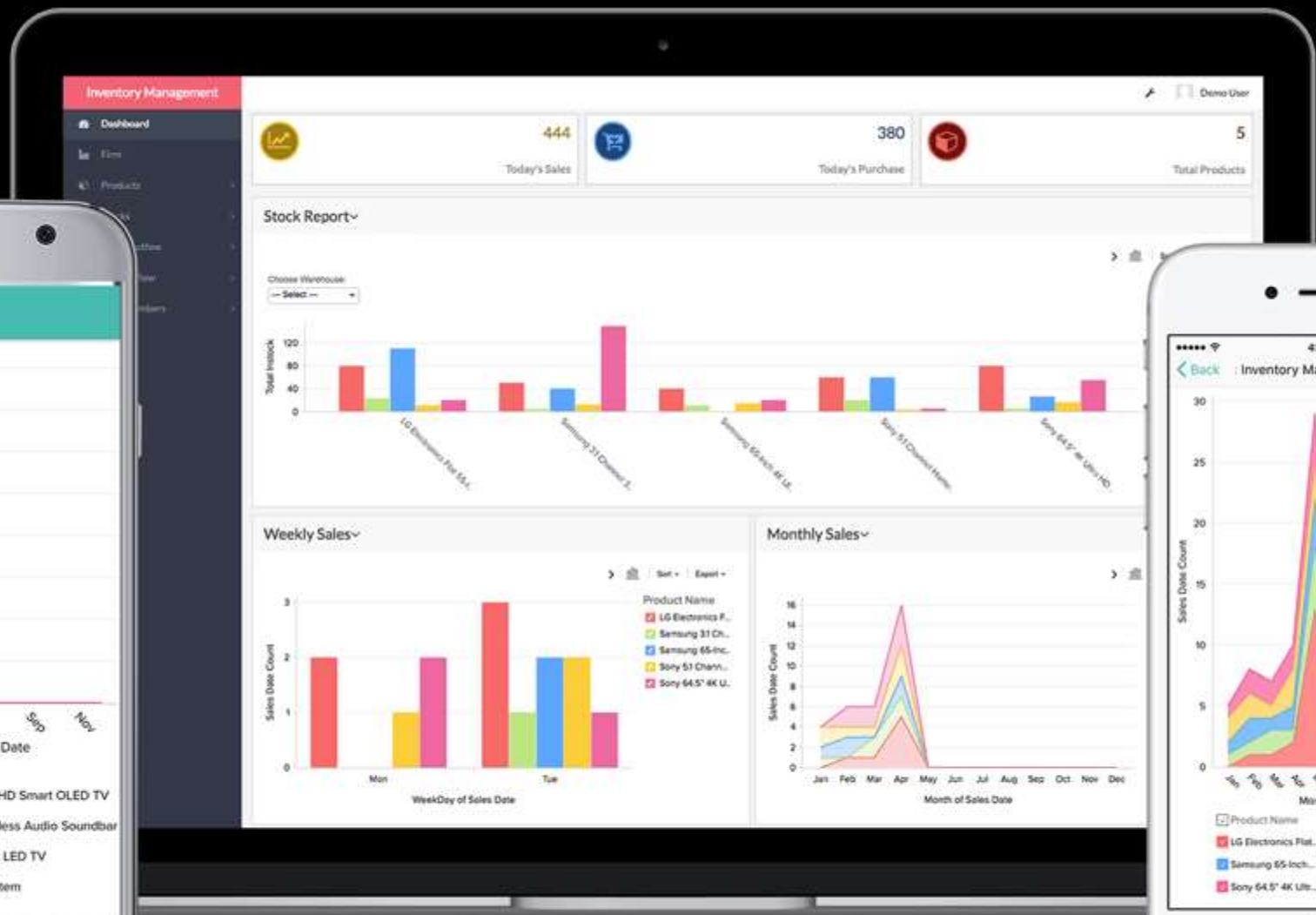
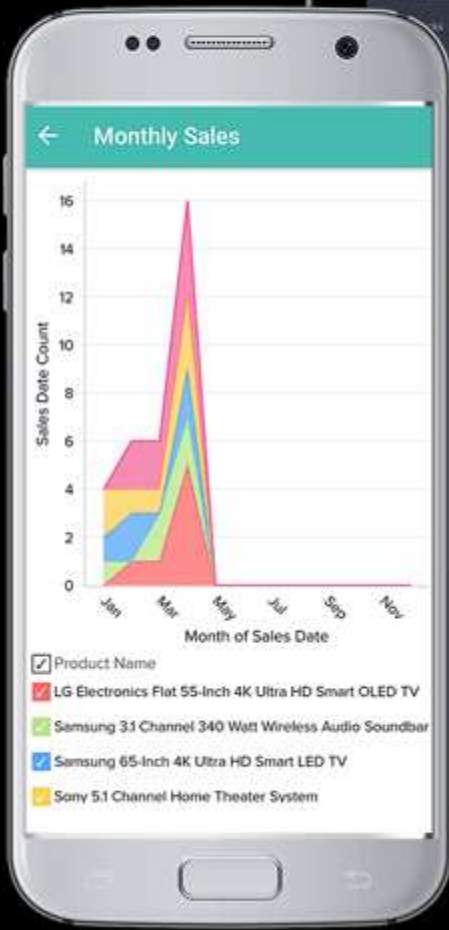
Sep 2018: \$545,46K

Satisfaction Rate



Account wise Closed Deals vs Tickets vs Paid Invoices





Marketing ROI Dashboard



ROI Nov 2018
\$196.12K ▼
 Oct 2018: \$6.49M

Revenue: Nov 2018
\$201.03K

Campaign Cost: Nov 2018
\$4.91K ▼
 Oct 2018: \$762.77K

Lead Conversion Rate: Nov 2018
49.62% ▼
 Oct 2018: 49.79%

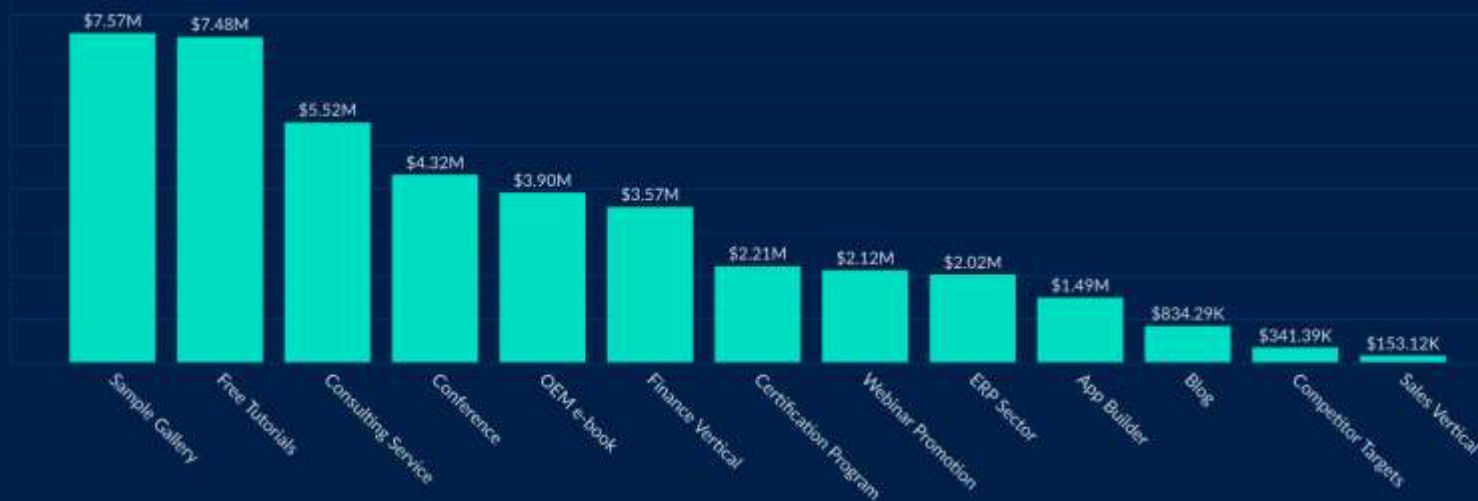
CTR Nov 2018
2.38% ▼
 Oct 2018: 2.97%

Avg CPC: Nov 2018
3.09 ▼
 Oct 2018: 3.55

Avg Lead Acquisition Cost
\$27.57

Avg Deal Acquisition Cost
\$552.80

ROI by Google Ads Campaign



ROI by Location



Revenue 2018
\$6.46M ↑
 2017: \$2.76M

Expense 2018
\$416.82K ↑
 2017: \$79.40K

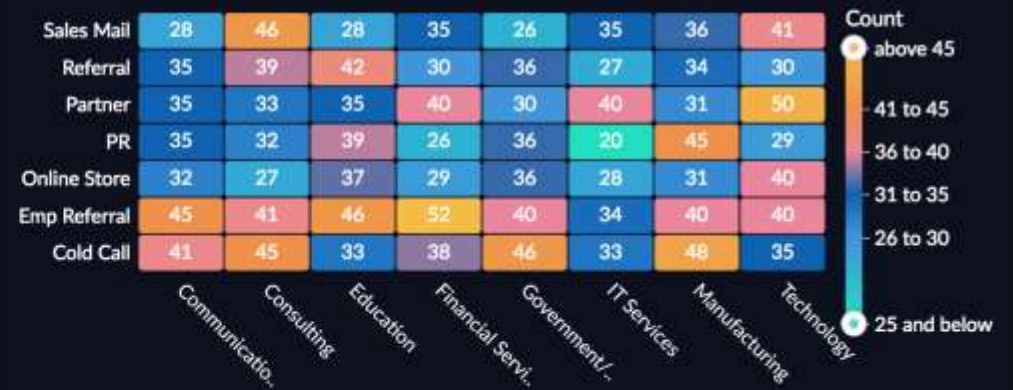
Profit 2018
\$1.75M ↑
 2017: \$10.64K

C-SAT Rate 2018
77.02% ↑
 2017: 76.95%

Global Customer Base



Leads Conversion by Industry and Source



Hiring vs Attrition



Revenue per Employee
111.18K

Active Employee Count
224

Hiring Rate YTD
145%



MARKETING

CAMPAIGNS

Create, send, and track *email marketing* campaigns that help you build a strong customer base. Send follow-up emails with ease using our marketing automation tools.

Like: Mailchimp or Constant Contact...



Welcome to Zylker

ate,
iks for subscribing to our newsletter. Our monthly ec
trends in the tech industry, interviews of industry le
different verticals, and much more. Want to know n
website.

Take me to website



MARKETING AUTOMATION

A single place to influence, educate, and engage your leads. **1.** Complete lead management. **2.** Understand every activity of your audience. **3.** Analyze the effectiveness of your campaigns across all channels. **4.** Multichannel marketing for all mediums (email/social/SMS). **5.** Well-defined reports with channel attribution for metrics that matter.

Compare this to HubSpot.

 Facebook Ads

8773	3728
Views	Leads

 Google Ads

5662	1282
Views	Leads

- VISITORS
- Tracking (86)
- History
- Feedback
- Reports
- SALESIQ
- My Profile
- Settings
- Purchase

SALESIQ

Live chat real time with your website visitors and provide live customer support. Increase the ROI on your content, SEO, Adwords, and email marketing efforts. Website visitor tracking and analytics rolled into one platform.
Leads auto populate into CRM.



Customize



SalesIQ

Engage website visitors and convert them into customers.



Campaigns

Create, send, and track effective email campaigns.



Social

Post content, interact with followers, and monitor conversations across social networks, from one place.



Survey

Make informed decisions using feedback from surveys.



Forms

Build forms for lead generation and customer engagement.



PageSense

Optimize your web pages for engagement and conversion.



Backstage

Run successful events



SUPPORT

The Headquarters

Team Feeds

Views

STARRED VIEWS

ALL VIEWS

All Tickets

CHR

Closed Tickets

Customer Responded Tick...

Missed Chats

My Open Tickets

☆ All Tickets

DESK

Overdue (5)

#864 Wireless charging
Morgan Leverett
late by 1 day 11 hours · Open

#592 Camera app not opening
Sam Rossner · Sam Rossner
late by 01:34 hour · In Progress

#571 GPS not working
Sam Rossner · Sam Rossner

Due in 6 hours (14)

#595 GPS not working
Casie Fletcher
Tomorrow 04:00 AM · In Progress

#671 Apps take time to load
Phillip Collins
Tomorrow 04:00 AM · Open

#560 Unable to turn on location services
Shane Howell
Tomorrow 04:00 AM · In Progress

#543 Reg picture quality
Barry Zingovich
Tomorrow 04:00 AM · Escalated

#539 zPhone battery needs to be fixed!
Sam Rossner · Sam Rossner
Tomorrow 04:00 AM · Open

#445 Using live wallpapers
Peter Graf
Tomorrow 04:00 AM · In Progress

#452 Sending video to another zPhone
Rajesh Arora

Due in 12 hours and more (25+)

#884 Rolling back updates
Sam Rossner · Sam Rossner
Tomorrow 12:00 PM · Open

#882 zPhone replacement
James van der Meer
Tomorrow 12:00 PM · Open

#880 zPhone Battery Issues
Pavithra
Tomorrow 12:00 PM · Open

#879 Apps take time to load
Phillip Collins
Tomorrow 12:00 PM · Open

#875 battery
Ashlin Paul · Ashlin Paul
Tomorrow 12:00 PM · Open

#854 What is the average life of a zPhone battery?
Sam Rossner · Sam Rossner
Tomorrow 12:00 PM · Open

#838 zPhone not working
Nicole Hawkins · Linchpin Apps
Tomorrow 12:00 PM · Open

Use Zoho Desk to close trouble tickets and open happiness. Desk is context-aware helpdesk software that helps you focus on the customer.

Like: ZenDesk.

Have field staff? This helps them too. Think of this as Case management to track issues and see them within the CRM. Or use it to track RMAs.

HQ

Team Feeds

Views

Agent Queue

Team Queue

Tags

≡→

★ All Tickets (82) ▾

Status Mode ▾ ⋮

Open (25+)

Phone not working 

#802 · John Hawkins
🕒 15 Apr 2019 03:35 PM

Open  4

zPhone Battery Issue 

#793 · Sarah Paul · Ashlin Paul
🕒 16 Apr 2019 08:22 PM

Open ▾  3

zPhone battery not charging 

#807 · Jacob McGrath · Zachary Keith
🕒 18 Apr 2019 09:33 AM

Open ▾  1

Camera lens fuzzy 


#829 · Cindy Miles
🕒 20 Apr 2019 11:43 PM

Open  1


Issue in zphone cable 

#1053 · Casie Fl... · Faulkner Enter...
🕒 01 Nov 2019 03:30 AM

On Hold (3)

New Year Discounts!! 


#1091 · Rahul
🕒 14 Dec 2020

On Hold  3


When is the new Zwatch launching? 

#1090 · Rahul 
🕒 14 Dec 2020

On Hold  1

Article feedback - 'Unable to pay' error while purchasin... 

#894 · lisamags
🕒 23 Sep

On Hold  1

Escalated (4)

Reg picture quality 

#543 · Barry Zingovich · Bazinga Inc.
🕒 11 Mar 2019 09:14 AM

Escalated ▾  3

Apps take time to load 


#879 · Collins
🕒 20 Apr 2019 06:33 AM


Escalated ▾  1


Camera app not opening 

#592 · Rossner · Amy's Food Factory
🕒 01 Nov 2019 03:30 AM

Escalated ▾  5

Z phone keeps rebooting 

#1666 · Priya Lagani  · Priya Lagani
🕒 06 Oct 01:37 AM


Escalated ▾  1


In Progress (21)


zphone cable not working 


#1054 · Casie Fl...  · Faulkner Enter...
🕒 01 Nov 2019 03:30 AM


In Progress ▾  12


Bug in default measurement app 


#1146 · Pat St...  · Pyramid Constru...
🕒 03 Jun 2020 03:30 AM


In Progress  3


Unable to log in to the zApp Store 

#1482 · John...  · Grand Hotels & Re...
🕒 03 Jun 2020 01:00 PM

In Progress  1

Zphone Reviews 

#1323 · Agbaria 
🕒 03 Jun 2020 01:00 PM

In Progress  25

Egnyte 

#1576 · Agbaria

Other Status (5)

Can we sync Goog with Zylker CarPac 

#1074 · Sarah Paul 
🕒 01 Nov 2019 03:30 A

Engineering Estim

Phone has slowed after the recent so 


#959 · James van der 
🕒 01 Nov 2019 03:30 A


Engineering ▾

Phone cable not w 

#1309 · sarah 
🕒 03 Jun 2020 02:45 P

Engineering Estim

zPhone Battery Iss 

#1049 · Sarah Paul 
🕒 05 Aug 2020 03:30

Engineering Estim

Z phone Screen replacement



COMMUNICATION AND COLLABORATION

CLIQ

Home

My Pins

Channels

Direct Messages

Lewis - Marketing Stra...

Alejandro Mendoza

Raymond

show all

Contacts

Paula Rojas

Mustafa - Technical A...

Chloe - IT Admin

Timothy - CEO

Raghav Rao

Tai Chang

Quinn Rivers

show all

Bots

Moviee

Taz

News Bot

Search (cmd + shift + f)

Chloe - IT Admin
Online

Monday, July 24th

Chloe - IT Admin
Hi Scott, I was wondering if we should meet the new interns once every week or on an ad hoc basis?

You
We could meet them on an ad hoc basis and let them know we are available for assistance.

Chloe - IT Admin
Alright, Cool 😊

You

Actions

CLIQ

- Why send email back and forth when you can chat in real time on your PC or Phone?
- No team can work together in person all the time. Therefore, CLIQ Channels excels!
- Create Channels for each team in your company and ensure that collaboration continues.
- No more tangled text messages or emails!

Like: MS Teams, WhatsApp, or Slack.

Manage | ☆ | @ | 🔄 | 📅 | ⚙️ | 👤

Alejandro Mendoza
Online

Thursday, September 7th

You
Hi Alejandro 😊
Is it possible to schedule a meeting tomorrow about the upcoming product launch with @Abigail - Marketing Lead and @Jacob ? 😊

Alejandro Mendoza
Hi Scott 😊
★ Yes! We can discuss about it at around 3 pm. I will inform @Abigail - Marketing Lead and @Jacob about it. 👍 🙌

You
Thanks man! See you then 👍

Alejandro Mendoza
Anytime 😊 Sure .. see you then 😊

Wednesday, September 13th

You
Hello Mark, I am still thinking about using a sort of calendar applications view.
Any recommendations?

Actions





- Dashboard
- Feed
- Tasks
- Issues
- Milestones
- Calendar
- Documents
- Timesheet
- Finance
- Forums


PROJECTS

Zoho Projects lets you:


- break up a big project into easily manageable parts
- Allocate work to your team to specify start and end dates.
- Automate task workflows by setting up Blueprints.
- Progress can be reviewed from a variety of locations throughout the app, including a Project dashboard.

The screenshot displays a Kanban board with four columns: Open, In Progress, To be tested, and Closed. Each column contains task cards with details such as task ID, description, sub-tasks, assignees, and due dates. For example, in the 'To be tested' column, there is a task 'DC-T41 Plumbing layout' with sub-task '- Plumbing- All tasks' and a due date of '02/13/2017 05:00 PM'. In the 'Closed' column, there are several tasks including 'DC-T183 Prepare client list for walk through' and 'DC-T186 Walk-through day plan'. A task card in the 'To be tested' column includes an image of a roof truss structure.


Tricia Boyle Training now
 Trainer • In


Cameron Peter
 Co-trainer • In

SHOWTIME


 Active for 25 mins


Raymond Powers
 Active for 17 mins


Janice Vasquez

Reimagined and Reinvented
for the cloud



6



7



8



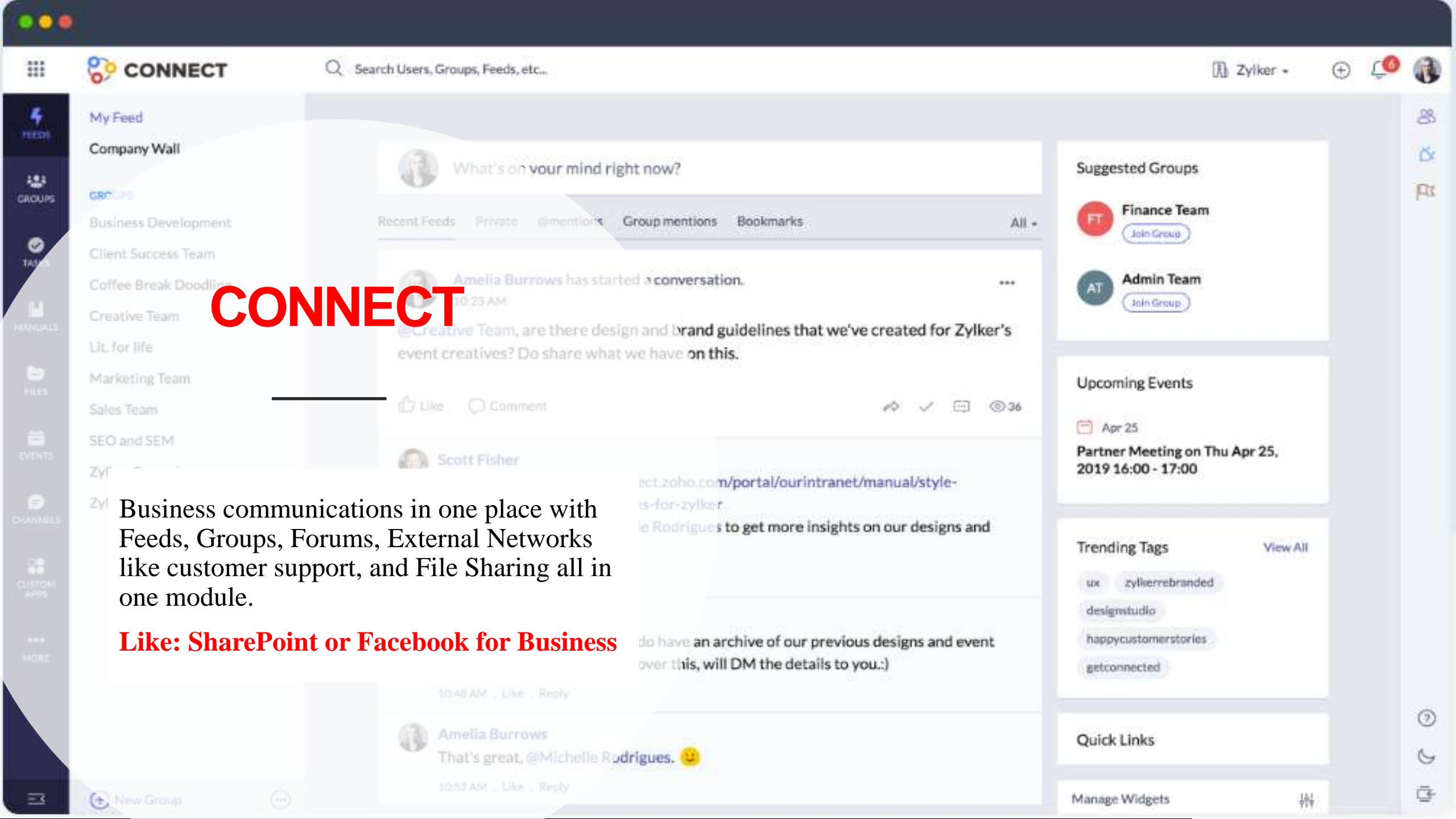
9



Reimagine the way you deliver your online training with ShowTime's myriad engagement features.

ShowTime gives you a simplified online presentation or training solution, without compromising on a superior experience.





CONNECT

Business communications in one place with Feeds, Groups, Forums, External Networks like customer support, and File Sharing all in one module.

Like: SharePoint or Facebook for Business



Mail

Securely hosted, ad-free email for your business.



Cliq

Quick and informal messaging for better team communication.



Projects

Plan, track, and collaborate on projects across teams to get things done.



Sprints

Project management for agile teams.



Connect

A private social network for team discussion and sharing resources.



Showtime

Present slide decks to audiences anywhere and interact with them. Works with PowerPoint too.



Meeting

Browser-based web conferencing to do demos and presentations without breaking a sweat.



PRODUCTIVITY



SIGN

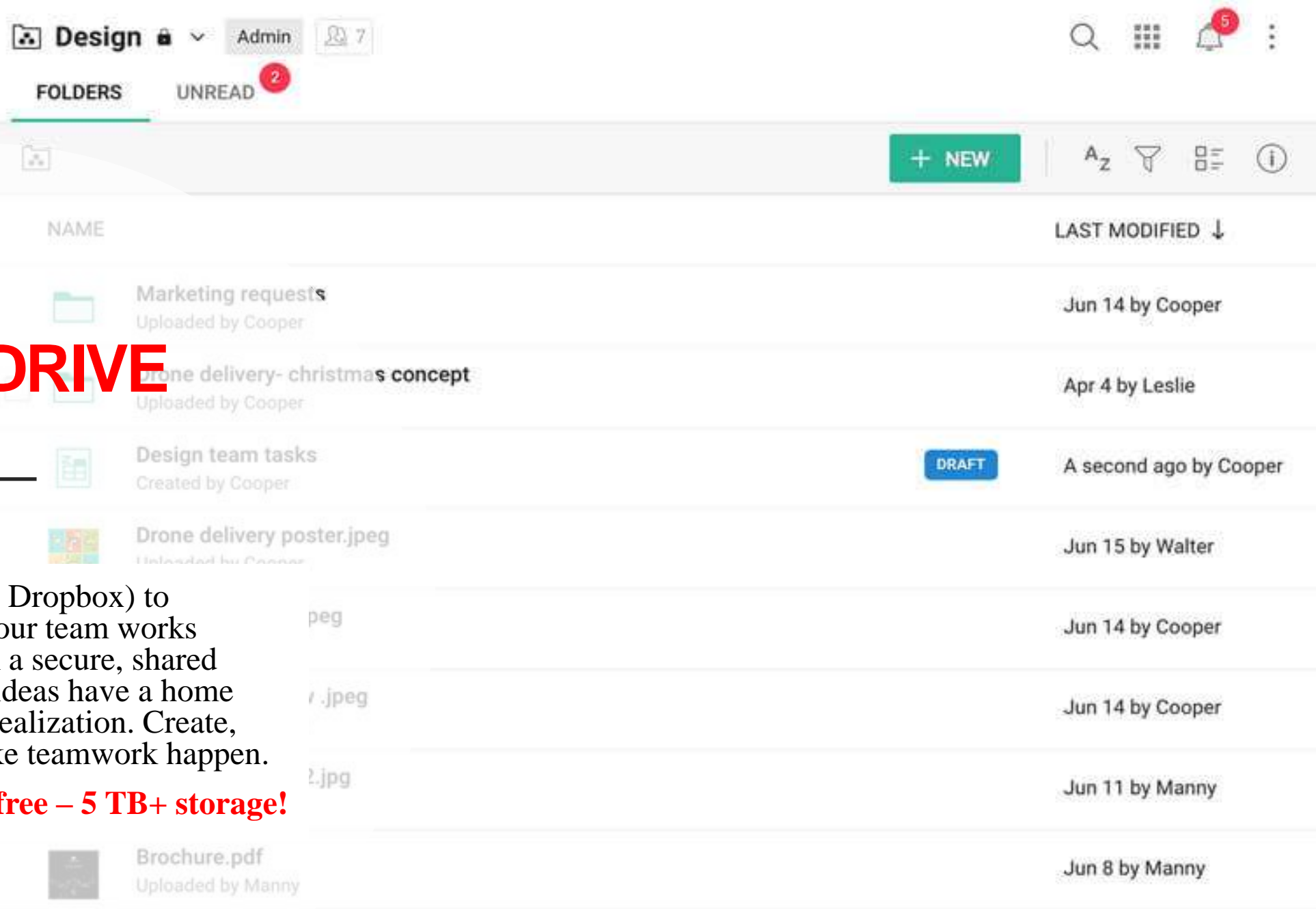
A complete digital signature app for business signatories. With Zoho Sign, businesses can sign, send, and manage legally binding documents from anywhere, using a simple and secure signing process.

Like: DocuSign included for free.

WORKDRIVE

Cloud storage (think Dropbox) to transform the way your team works together—give them a secure, shared workspace, so their ideas have a home from conception to realization. Create, collaborate, and make teamwork happen.

Like: Dropbox for free – 5 TB+ storage!



Calendar List View

Today Day Week Month

Monday, 06 January 2021

Tricia Boyle Manager - Zylker Property Management

Jo Yung Staff - Property Agent

BOOKINGS

Andrew Hudson Show House 2001

Show House 3001

1 hr 45 mins | Free Upcoming

06 Jan 2020 06:00 pm - 07:45 pm

Reschedule

Cancel

Bobby Chatswood Show House 2001

Heather Graham Show House 3001

12:00 pm - 01:45 pm

Collin James Show House 3001

03:00 pm - 04:45 pm

Dennis Orwell Show House 3001

06:00 pm - 07:45 pm

Avoid surprise bookings. Block out your schedule. Set up buffer times. Sync w/ Google or Outlook calendars.

Like: Calendly

Payment Free

View Details



Calendar

List View

Today

Day

Week

Month

Monday, 06 January 2021



Tricia Boyle

Manager - Zylker Property Management



Jo Yung

Staff - Property Agent



Show Before Working Hours

10 am

11 am

12 pm

1 pm

2 pm

3 pm

4 pm

5 pm

6 pm

7 pm

8 pm

9 pm

Andrew Hudson
Show House 2001

Bobby Chatswood
Show House 2001



Show House 3001

1 hr 45 mins | Free | Upcoming



06-Jan-2020



06:00 pm - 07:45 pm

Reschedule

Cancel

Booking Details

Booking ID #ZY-00260

Workspace Zylker Property Management

Customer Dennis Orwell

Phone +112312312

Email dennis@zylkermail.com

Payment Free

[View Details](#)

Heather Graham
Show House 3001

12:00 pm - 01:45 pm

Collin James
Show House 3001

03:00 pm - 04:45 pm

Dennis Orwell
Show House 3001

06:00 pm - 07:45 pm



Writer

A slick online word processor for collaborative work.



Sheet

A collaborative cloud spreadsheet so powerful you'll wonder why you didn't leave your desktop app earlier.



Show

Create beautiful slide decks with ideas from multiple collaborators.



Docs

Store and share files and documents with teammates, partners, vendors, or customers.



Sign

Sign documents digitally and request signatures.



Notebook

A beautifully simple note-taking app to keep your life in order.



Vault

Securely store and manage your teams' passwords.




HUMAN RESOURCES


Employee Directory


Found 10 Matching Member(s)


Search Term **hr** X


PEOPLE



 ZY198 - Christine Spalding **In**
 Director
 HR
 @cspalding@zylker.com



 ZY345 - Richie Ken **Out**
 Manager - HR
 HR
 @richiken@zylker.com



 ZY256 - Michelle **In**
 Associate Manager - HR
 HR
 @micheller@zylker.com
 5678


 ZY134 - Rebecca Biaggio **Out**
 Manager - HR
 Human Resources
 @biaggio@zphone.zylker.com


 2 - Liam Johnson **In**
 HR Executive
 HR
 @cliff@zphone.zylker.com


 Aaron Welsley
 Corporate Finance


 Abigail Anderson
 Marketing


 Addison Bernice
 Corporate Finance

 Ahmed Hussain
 IT








 Albert Audrey
 Corporate Finance

9:41

Organization

COLLEAGUES DEPARTMENTS

Frequently Viewed

-  Olivia Stacy
Support central plus
-  Ryan West
Customer Support
-  Aaron Welsley
Corporate Finance
-  Abigail Anderson
Marketing
-  Addison Bernice
Corporate Finance
-  Ahmed Hussain
IT
-  Albert Audrey
Corporate Finance

We take care of your HR processes while you take care of your employees. From onboarding and attendance management to time tracking and appraisals, Zoho has it all covered.

Like: Gusto, Zenefits, or BambooHR

- Employee
- Department
- Designation
- Exit Details
- Company Policy
- Resignation Form
- Offer Letter Form
- GOAL custom form
- Offer Letter Form
- Travel Expense_1
- Travel Expense
- Employment Proof Letter
- Training
- Asset form
- Expense Submission
- Salary Slip
- Salary Form
- Training Registration
- Travel Request
- Conference room booking
- Invoices
- Salary slips
- Asset Request Form

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z



FINANCE

Finance



Books

Intuitive online accounting software to track the health of your business.



Invoice

Get paid faster with professional invoices that reflect your brand.



Subscriptions

Bill your customers on a recurring or subscription basis.



Expense

Turn receipts into expense reports for quick approvals.



Inventory

A centralized inventory management system for distributed sales channels like retail store, online shop, or marketplaces like Amazon or eBay.



Checkout

Collect payments online.

- Dashboard
- Receipt Inbox
- Expenses
- Reports
- Cards
- Advance Payments
- Reports Approval
- Analytics
- Admin
- Contact Support

Dashboard

Getting Started

Drag Receipt(s)
or click here to attach

New Expense

New Report

EXPENSE

Reports Summary

UNSUBMITTED
\$771.18

SUBMITTED
\$993.32

AWAITING REIMBURSEMENT
\$3,473.58

7 Reports

Zoho Expense helps with your expense management by handling all your expenses, approvals, and reimbursements.

Trip USA NY

\$493.29
SUBMITTED

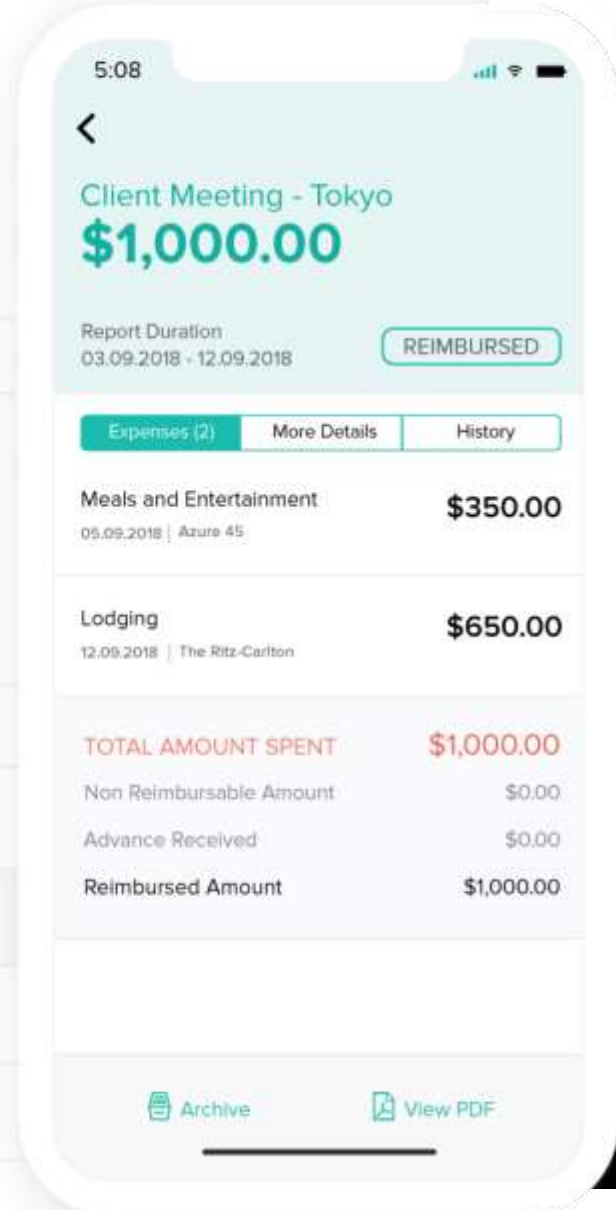
Submitted on
25.09.2018

Business trip - Singapore

\$118.01
DRAFT

Submitted on
25.09.2018

Show all reports





Dashboard

Items

Banking

Sales

Purchases

Time Tracking

Accountant

Reports

Dashboard

Total Receivables



CURRENT
\$27,320.00

OVERDUE
\$4,847.00

Total Payables



CURRENT
\$2,500.00

OVERDUE
\$2,440.00

ZOHO BOOKS

Cash Flow



Cash as o

Cash as o

Cash Flow

ENDING BALANCE
Mar 2019 **\$10,975.00**



Cash as on 29 Oct 2018
\$9,013.00

Accounting software for business! Books makes invoicing and managing receivables effortless. Send customized statements to your clients and receive payment in multiple currencies with our accounting software.

Like: QuickBooks

Income and Expense

This Fiscal Year



Your Top Expenses

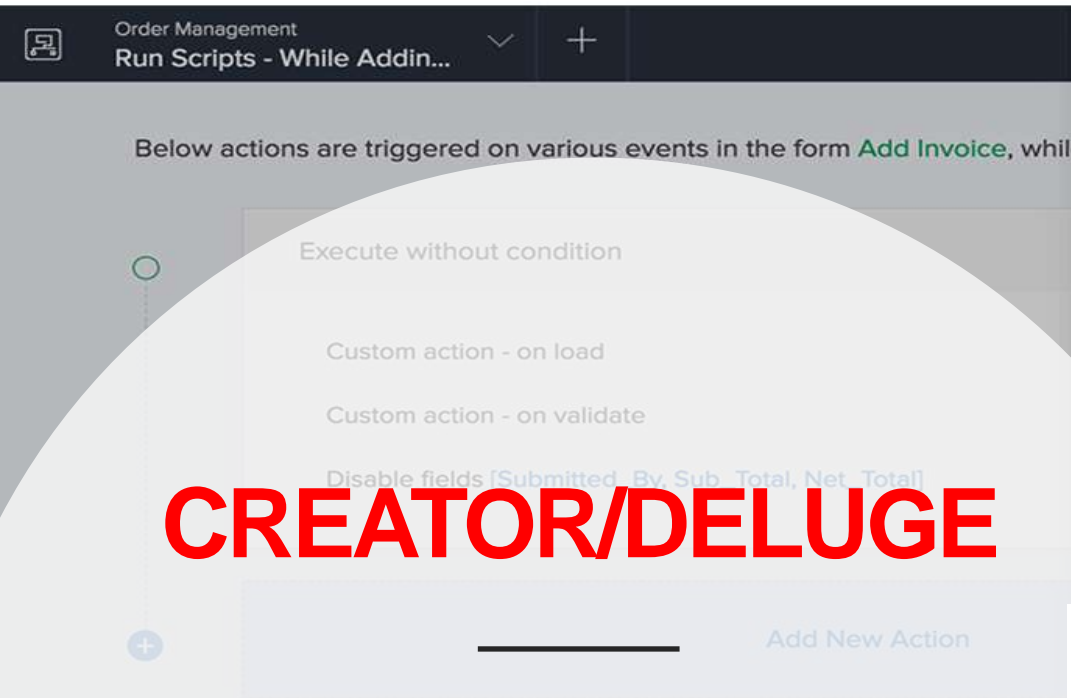


Automobile

- Dashboard
- Contacts
- Invoices
- Timesheet
- More



CUSTOM SOLUTIONS WITH CREATOR



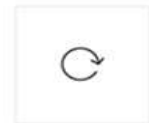
CREATOR/DELUGE

From everyday tasks to complex process automation, do everything with the multi-platform app builder.

Create your own mobile app or get started with a ready-made one.

Have a developer streak?
Leverage the platform to build solutions.

Select an event



On load
When the form loads



On validate
Before submitting the form



On success
After successful form submit



On user input
When changing value of a field

Integrate your favorite apps.

Share data to and from your Zoho Creator apps, other Zoho services, or third-party vendors like Zapier, PayPal, and more.





Creator

Build custom apps for your business needs



Site24x7

Website monitoring from a global perspective



Flow

Integrate your apps to automate business workflows



Assist

Support remote customers instantly



Vault

Online password manager for teams



BugTracker

Fix bugs fast and ship great software



Mobile Device Management

Easy-to-use & affordable web-based MDM solution



Patch Manager Plus

Stay clear of vulnerabilities and cyber attacks



Identity Management

An identity management and governance solution



Log Management Cloud

Store and manage all your log data on a secure cloud platform



Catalyst

Simple Serverless Platform



Lens

Solve problems with interactive remote assistance



Desktop Central

A 360-degree UEM solution for enterprise management and security



ServiceDesk Plus

Offer best-in-class IT support on the cloud

This page is a host of other IT and developer applications we have not even mentioned yet...

Zoho One applications are also mobile friendly.

So... not just web-based.

Go mobile, and take your business with you.

- ✔ Receive email, SMS, and push notifications.
- ✔ White label apps for your clients and vendors.
- ✔ Accept payments and analyze your reports.
- ✔ Submit data, even if you're offline.
- ✔ Customize mobile screens and repeated actions.



This is **an example** of a customer who sells machine parts who outgrew Act!.

- They saved 65% switching to Zoho One. Crazy?

Ala Cart apps for 8 users

1. Act! CRM for 8 users is \$3840 yearly
2. Act! Mobile is \$672 yearly
3. MailChimp eBlasting is \$1620 yearly
4. QuickBooks w/ Payroll 5 users/\$3216 yearly
5. Dropbox for Business is \$599 yearly
6. QuoteWerks is \$1200 yearly for 5 users
7. Office 365 is \$150 per user (\$1200 a year)

***Cost of a new Dell server replaced every 4-5 years
(\$3400 + install costs from IT vendor)*

Total yearly software cost: **\$12,347.00**

Cost of Zoho One for 8 users

- Zoho One is \$3552 (\$444 per user yearly)
Everything included at no extra cost.
- Office 365 is \$150 per user (\$1200 a year)

Total yearly software cost: **\$4852.00**



Thank you.

The “all-employee” plan is \$37 user/month paid annually.

- Don't feel overwhelmed.
You may use just 4 or 5 of the 50+ available apps.
- **Ask me questions!**

📞 877-569-8005

✉ Michael@ActiveSales.net

🌐 www.ActiveSales.net

Sign up [link - HERE](#)