BI APP FOR ZOHO CRM USERGUIDE

CREATE BI APP FOR ZOHO ACCOUNT

• Go to login.biapp.com and click "create new account" under the form to create your account.

blapp	
	Login
Username or Email	
Password	
Sign In	Lost your password?
New to site	e? Create new account

- Fill the fields and click on "Register".
- You are now registered and ready to sign in.

SIGN IN

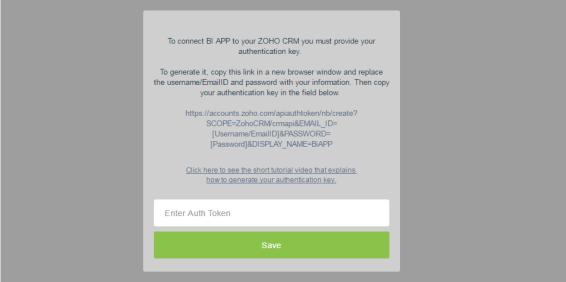
• From the login.biapp.com page, enter your username and password, then click on "Sign in".

blapp	
• • •	Login
Username or Emai	1
assword	

CONNECT BI APP TO YOUR ZOHO CRM

GET YOU AUTHENTIFICATION KEY

- After you signed in, you will have to generate your authentication key to activate your BI APP for ZOHO software.
- You will find the information and also a link to a video that explains you how to generate your authentication key.

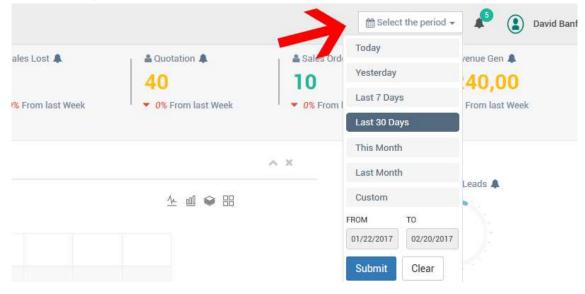


- As the text information indicates it, you have to copy the displayed link and paste it into a new browser window.
- In the address bar, replace the username/EmailID and password with your own username and password. Then click "enter".
- Your authentication key has been generated and is displayed on the screen. Copy it, get back to your BI APP for ZOHOM software and paste your authentication key into the "Enter Auth Token" field. Then click "Save".

DASHBOARD SETTINGS

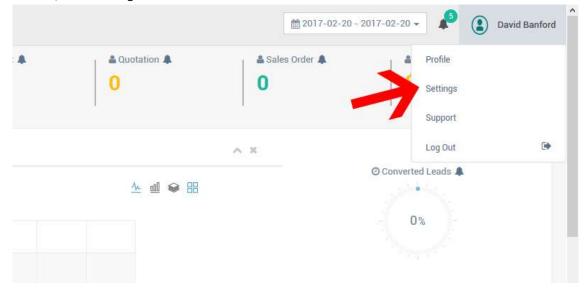
PERIOD TO DISPLAY

• You can display your business data for any period you want by clicking on the 'select period' menu at the top of the window.



DATA SYNCHRONIZATION INTERVAL

• You can set the data synchronization interval by clicking on your 'Profil' at the top of the window, then 'Settings'.

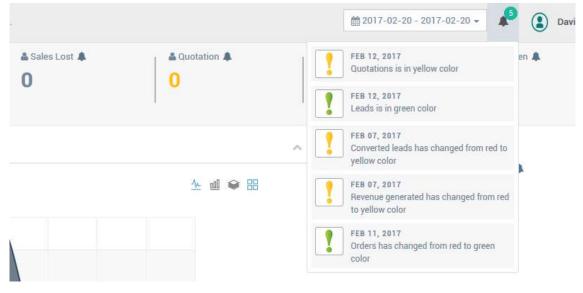


• The data synchronization interval window appears, so you can make your selection.

i.	Please set your data synchronization interval			
	Every 15 minutes	•		
	Every 15 minutes Every hour Twice a day Daily Weekly	~ ×		
ent year res	ults -O- Last year results			

ALERTS

• You can find all of your alerts history by clicking on the bell, at the top of the window.



SET YOUR ALERT LEVELS

٠

- = Life time data is displayed by default. You can select a specific period in the calendar control. 6 000 - 2 0 WG 🛔 Leads Created 🌲 🍰 Potentials 🌲 🛔 Sales Won 🌲 📥 Sales Lost 2 9 1 44 Home 0% From last W ▼ 0% From last Week ♥ 0% From last Week 0% From I Sales Evolution -O- Current year results -O- Last year results 1,000-800

You can set the alert level of an indicator when you see a bell icon at the top of it

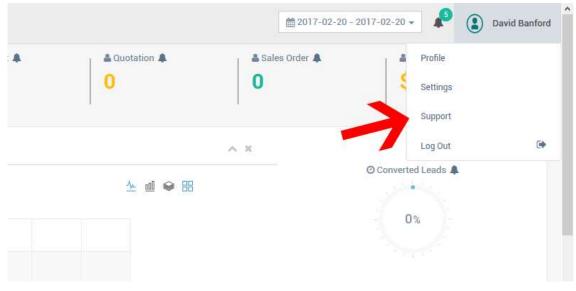
٠ To set the level alert, click on the bell icon and the settings window will appear. Use the slider to adjust.

		40:80				≜ Sali
Week	0	72	144	216	288	▼ 0%
	No Noti	fication		Close Save	changes	
year results	-O- Last year re	esults				

As soon as a result goes in a new color, you will receive an alert on your mobile phone. ٠

SUPPORT

• You can access to support information by clicking on your 'Profile name', then 'Support'.



• The support page displays support link and word references.

6 app - 2010	Ule time data is displayed by default. You can select a specific period in the calendar control.	🤌 😩 David Banford -
B Welcome, David Banford	Support	
GHNYAAL	To have more information about BUAPP for 2004(0, please visit: http://toho.bispp.com/ If you need support, please contact: toho Information.about the indicators of your dashboard; Culendar context: The exclusion: any our dashboard represent the data of your 20040 CIMM for the period selected in the culendar context Potentials Context: The exclusion: any our dashboard represent the data of your 20040 CIMM for the period selected in the culendar context Potentials Context: Total number of Dealer transford Bales Work: Total of Context: transford the data State Outcideon: Total more of apotations areated Bales ander: Conta number of apotations areated Bales ander: Conta number of apotations areated	
	Revenue Generated: The studi amount from the Owalay which have studue as work. Balke Svolution: Preventions of your salker smaller by month for the less the months, are companison with your salker results of last year. Converted Leads: 4-of Leads that have been converted to Douls. Winstat % - of Outstation: that have been converted to Salker Orders. Balkes by products: It horealisticant of your salker presented by products & services. Balkes by products: No Provide Salker Orders in Company and the Balker Orders. Balkes by products: No Provide Salker Orders in Company and the Salker Orders. Balkes by products with the Salker Orders in Company and the Salker Orders. Balkes by tentity: No matching of your salker presented by the impresentatives. Prophetice by the analytic in the Salker Orders in Company on the World Map. Balkes by tentity: No matching of your salker presented by the World Map. Balkes by tentity: No matching of your salker presented by the World Map. Balkes by tentity: No matching of your Salker. Orders in Company on the World Map. Balkes Cycle: The everage number of Glys for the sales process, from the Leads stage to the Sales Won	
ð		BLAPP FOR 20HO. Copyright BLAPP inc. 2017

We hope you will enjoy your experience with BAPP.

If you need additional support, please contact: <u>zoho@biapp.net</u>