

Leaflet[®] Platform[™]

ZOHO

USER GUIDE

TABLE OF CONTENTS

Table of Contents	2
1 LEAFLET PLATFORM ON ZOHO	3
2 LOGING IN ZOHO INTEGRATION WITH LEAFLET	3
2.1 ZOHO LOGIN	3
2.2 ACCESS LEAFLETS.....	4
2.2.1 ACCESS THROUGH ACCOUNTS TAB.....	5
2.2.2 ACCESS THROUGH CONTACTS TAB.....	10
2.2.3 ACCESS THROUGH DEALS TAB.....	13
2.3 GENERATED CONTRACTS ON ZOHO.....	15
2.4 LEAFLET MAPPING.....	16
2.4.1 MAPPING ON PORTAL.....	17
2.4.2 MAPPING IN LEAFLET FACTORY	18

1 LEAFLET PLATFORM ON ZOHO

Leaflet 2.0 has integrated Zoho with its platform. User can access Leaflets using a single login into the Zoho application itself.

Leaflet Corporation enables law firms, practice groups or individual lawyers to take all or part of the questionnaire that drives any Document and publish it out to clients. Each questionnaire published out in this fashion is called a “Leaflet.” Such Leaflets are mainly auto filled and available for use with limited efforts required thereafter. Any of the clients who have been granted access to a Leaflet can use it and submit their Documents and then generate as many versions as required for any Document.

Leaflets are flexible, mobile interviews that you extract from your automated forms and share with anyone who might request documents from you. Leaflets are easy to create and customize.

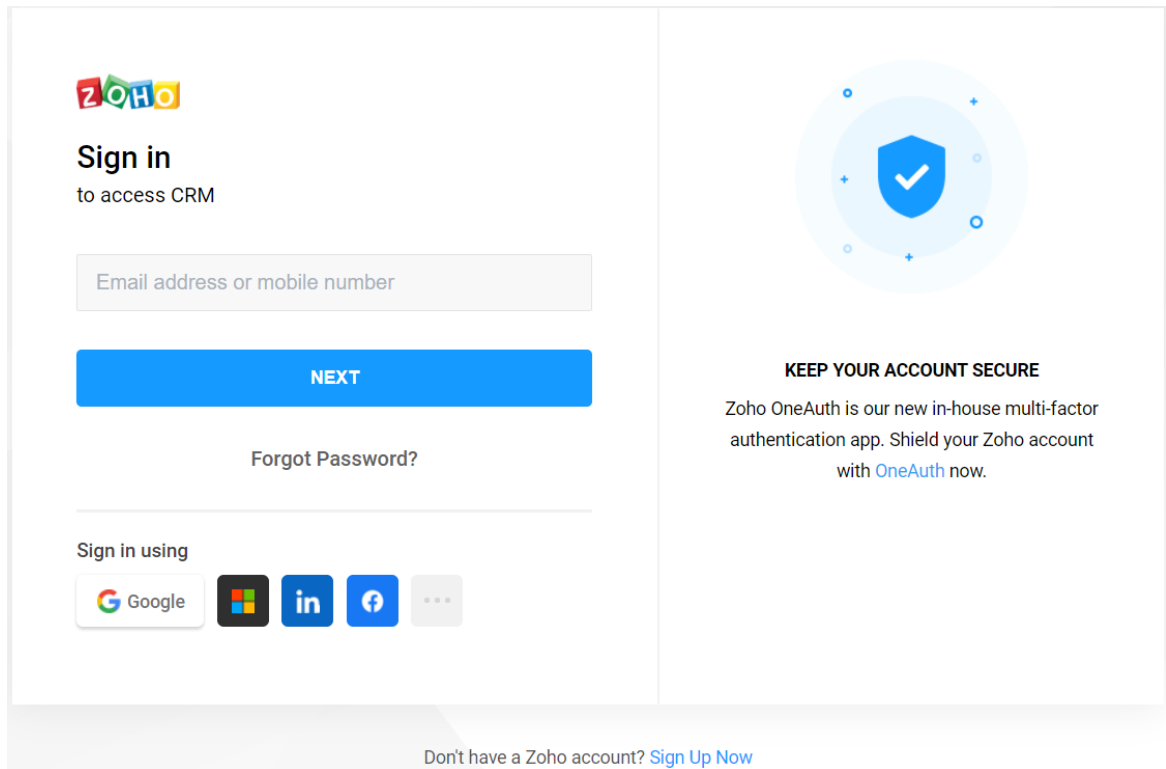
2 LOGING IN ZOHO INTEGRATION WITH LEAFLET

2.1 ZOHO LOGIN

Log in Zoho from:

<https://accounts.zoho.in/signin?servicename=ZohoCRM&https://www.zoho.in/crm/signup.html?plan=enterprise>.

Provide Email Address/ Mobile Number and click on Next button. Then provide Password and select Sign In button. Else create an user for Zoho and then continue signing in.



The image shows a Zoho CRM sign-in page. On the left, there is a Zoho logo, the text "Sign in to access CRM", a text input field for "Email address or mobile number", a blue "NEXT" button, a "Forgot Password?" link, and social login options for Google, Microsoft, LinkedIn, and Facebook. On the right, there is a circular security icon with a shield and checkmark, and text that reads "KEEP YOUR ACCOUNT SECURE" followed by a description of Zoho OneAuth. At the bottom, there is a link for "Sign Up Now".

2.2 ACCESS LEAFLETS

Various documents can be created under Leaflets. This is the place where all the Leaflets and its versions can be viewed after generating. Basically we need to fill a questionnaire based on the document and most of the part can be created as such which is auto-filled. Such is then generated and a ready document is obtained. Execution through this is easy, concise and time saving.

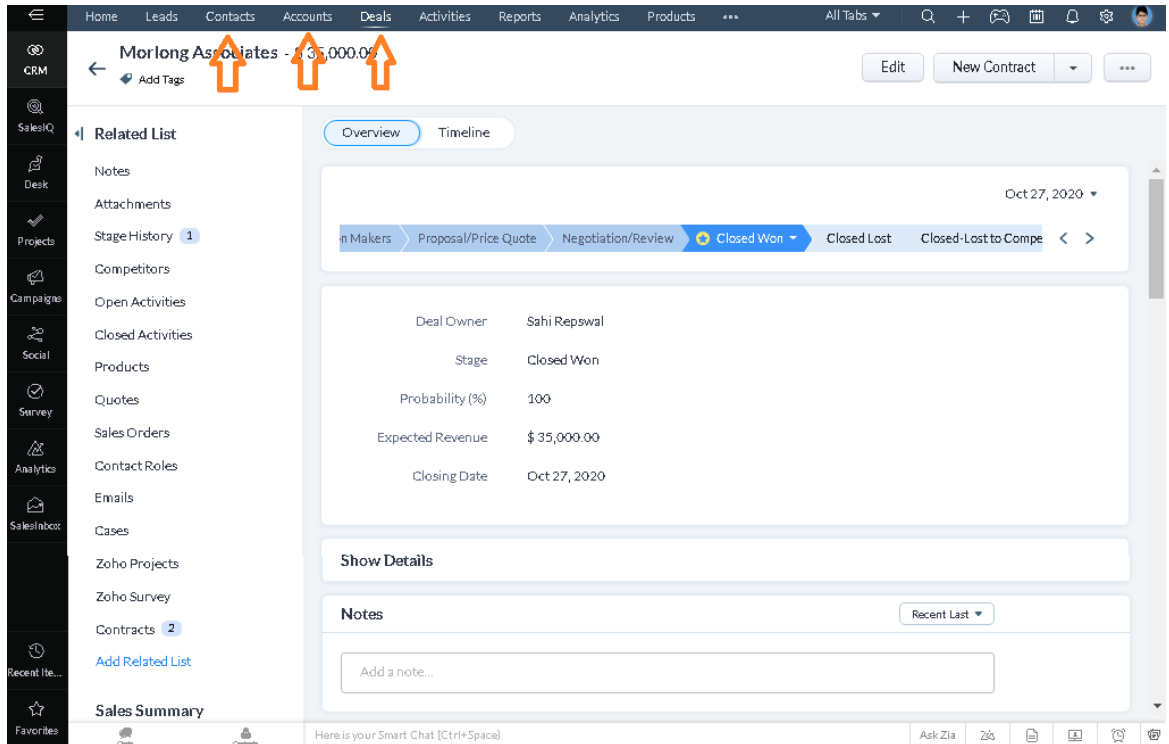
Thereafter, concise list is available for user. Hence manages all the documents, from their start till end. And also enables to keep a regular check in a much easy and concise form.

Leaflets in Zoho can be accessed via the following tabs:

1. Contacts Tab
2. Accounts Tab
3. Deals Tab

Other two are as below, which are yet not available(can be configured):

- 4. Leads Tab
- 5. Users Tab



2.2.1 ACCESS THROUGH ACCOUNTS TAB

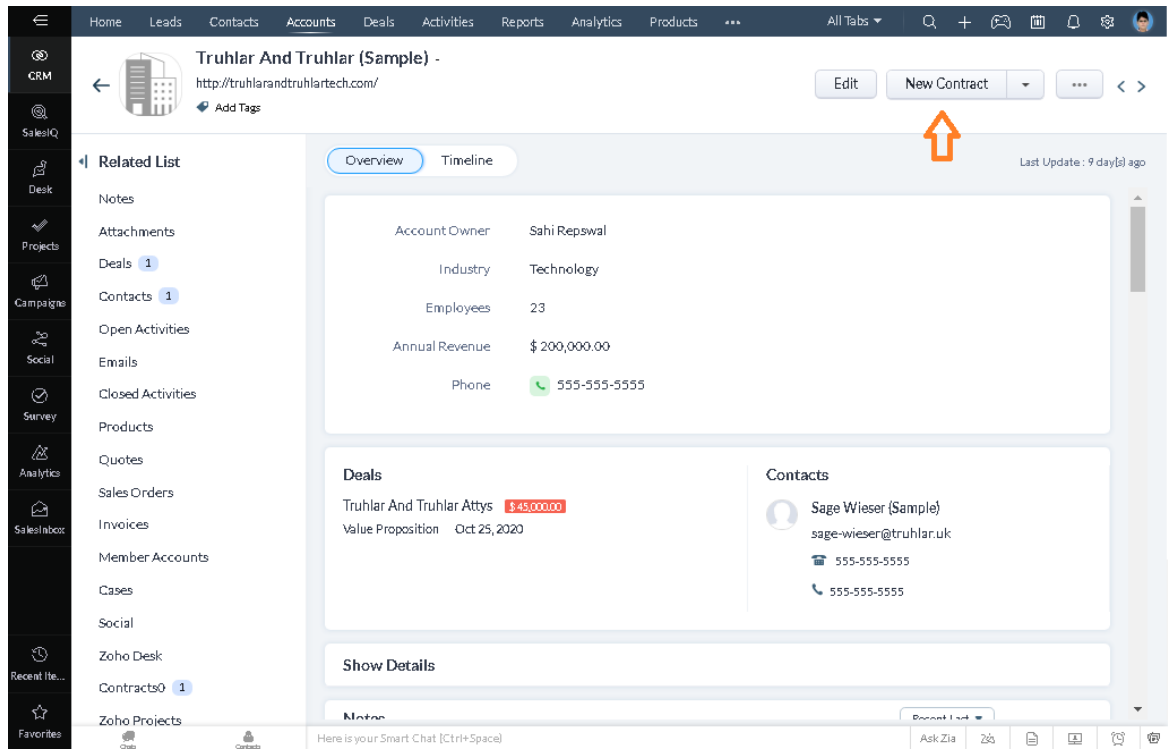
- 1. Click on the "Accounts" tab and select the requisite account.

The screenshot shows the CRM interface with the 'Accounts' tab selected. The top navigation bar includes Home, Leads, Contacts, Accounts, Deals, Activities, Reports, Analytics, and Products. The 'Accounts' tab is highlighted with an orange arrow. Below the navigation bar, there is a search bar and a 'Create Account' button. The main content area displays a table of accounts with columns for Account Name, Phone, Website, and Account Owner. A sidebar on the left allows filtering accounts by system-defined filters (e.g., Touched Records, Untouched Records) and fields (e.g., Account Name, Account Number). The table lists 12 accounts, including Leaflet Corporation, King (Sample), Truhlar And Truhlar (Sample), Commercial Press (Sample), Morlong Associates (Sample), Chapman (Sample), Printing Dimensions (Sample), Feltz Printing Service (Sample), Chemel (Sample), Chanay (Sample), and Benton (Sample).

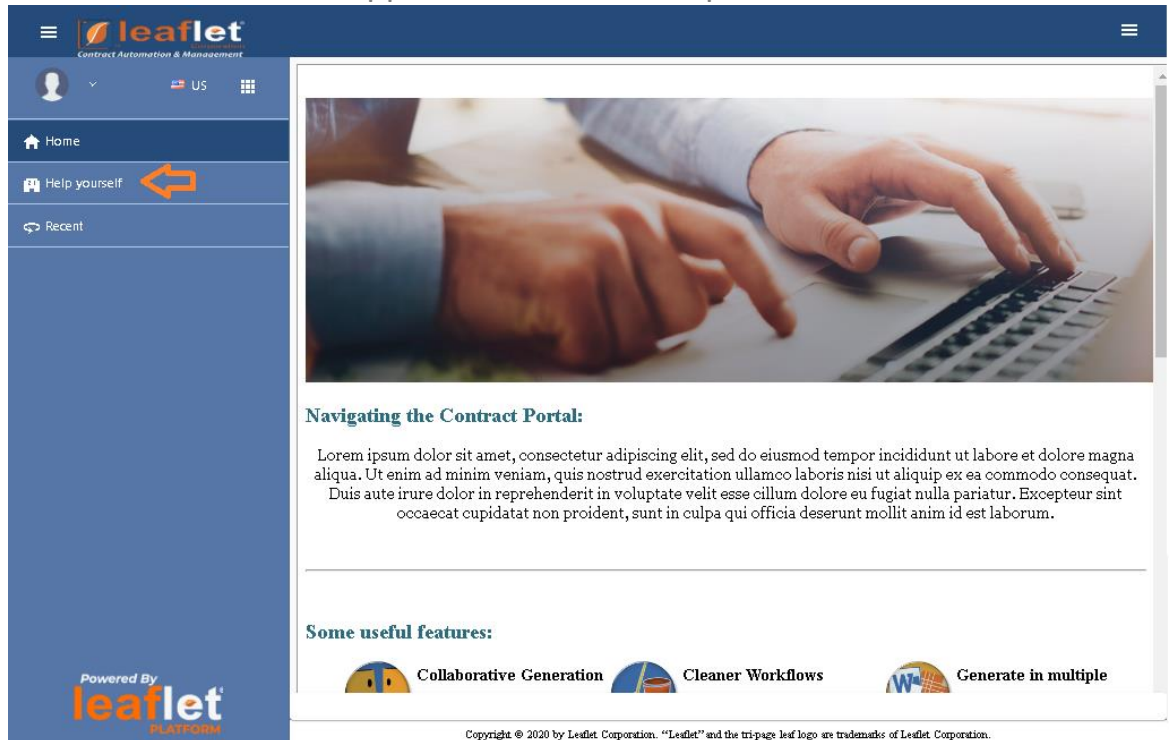
2. The account details page will open up.

The screenshot shows the account details page for 'Truhlar And Truhlar (Sample)'. The top navigation bar is the same as in the previous screenshot. The main content area is titled 'Truhlar And Truhlar (Sample) - http://truhlarandtruhlarartech.com/'. Below the title, there are buttons for 'Edit', 'New Contract', and a menu icon. The page is divided into a 'Related List' on the left and a main content area. The 'Related List' includes sections for Notes, Attachments, Deals (1), Contacts (1), Open Activities, Emails, Closed Activities, Products, Quotes, Sales Orders, Invoices, Member Accounts, Cases, Social, Zoho Desk, Contracts (1), and Zoho Projects. The main content area has tabs for 'Overview' and 'Timeline'. The 'Overview' tab is active, displaying account information in a table format: Account Owner (Sahi Repswal), Industry (Technology), Employees (23), Annual Revenue (\$200,000.00), and Phone (555-555-5555). Below this, there are sections for 'Deals' (Truhlar And Truhlar Attys, Value Proposition Oct 25, 2020, \$45,000.00) and 'Contacts' (Sage Wieser (Sample), sage-wieser@truhlaruk, 555-555-5555). A 'Show Details' button is also visible.

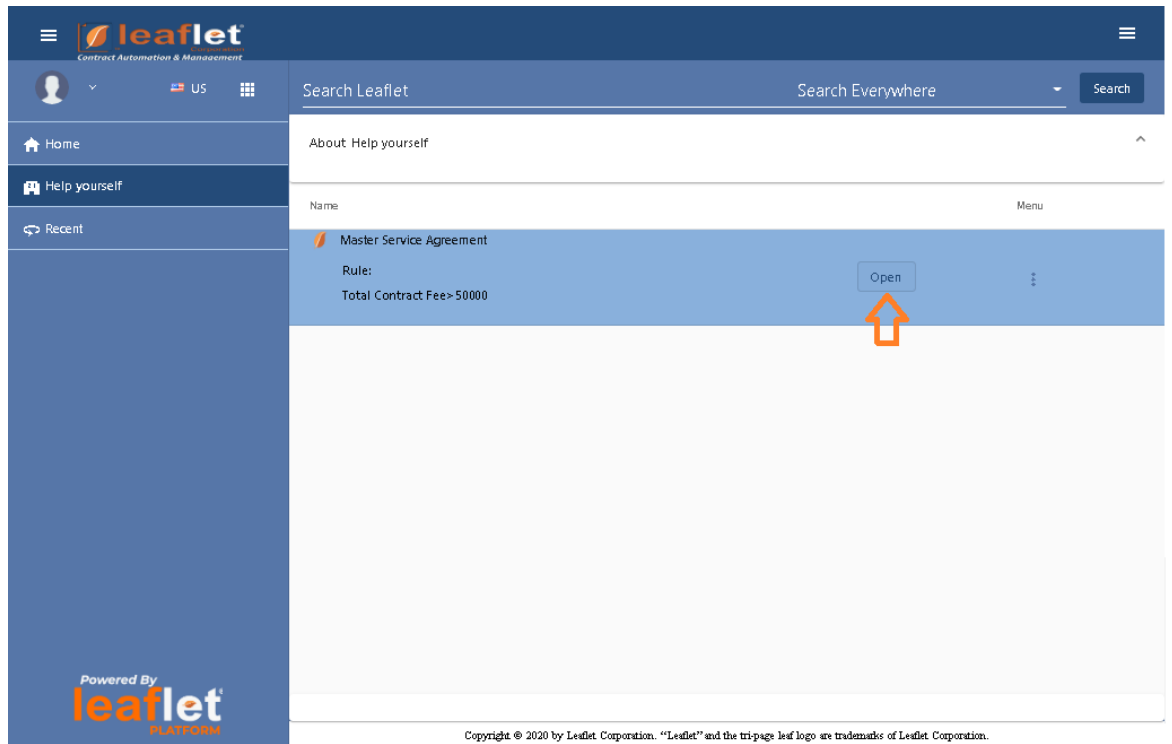
3. Click on the “New Contract” button to go to the Leaflets landing page.



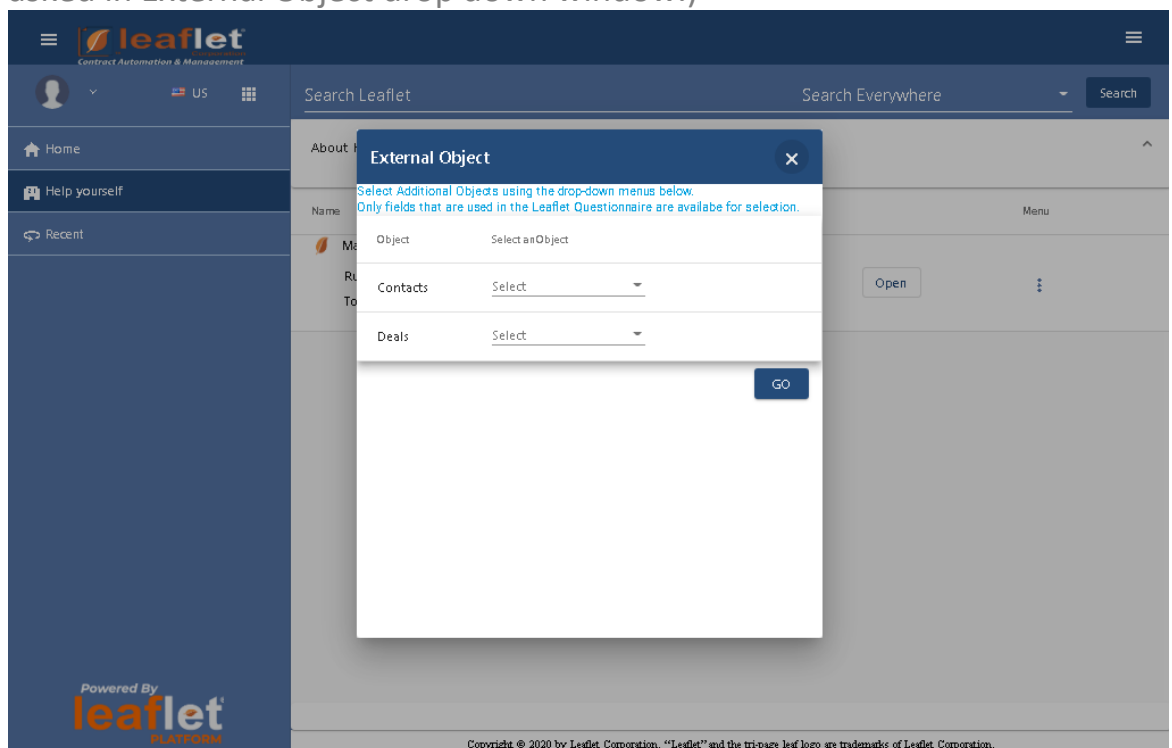
Leaflet Portal window appears now. Go to Help Yourself.



Open desired Leaflet.



As we are coming from a specific account so in External Object window Account details won't be asked. (Similarly if we are going through specific Contacts/ Deals/ Leads/ Users then that won't be asked in External Object drop down window.)




Select requisite detail from drop-down and select Go.

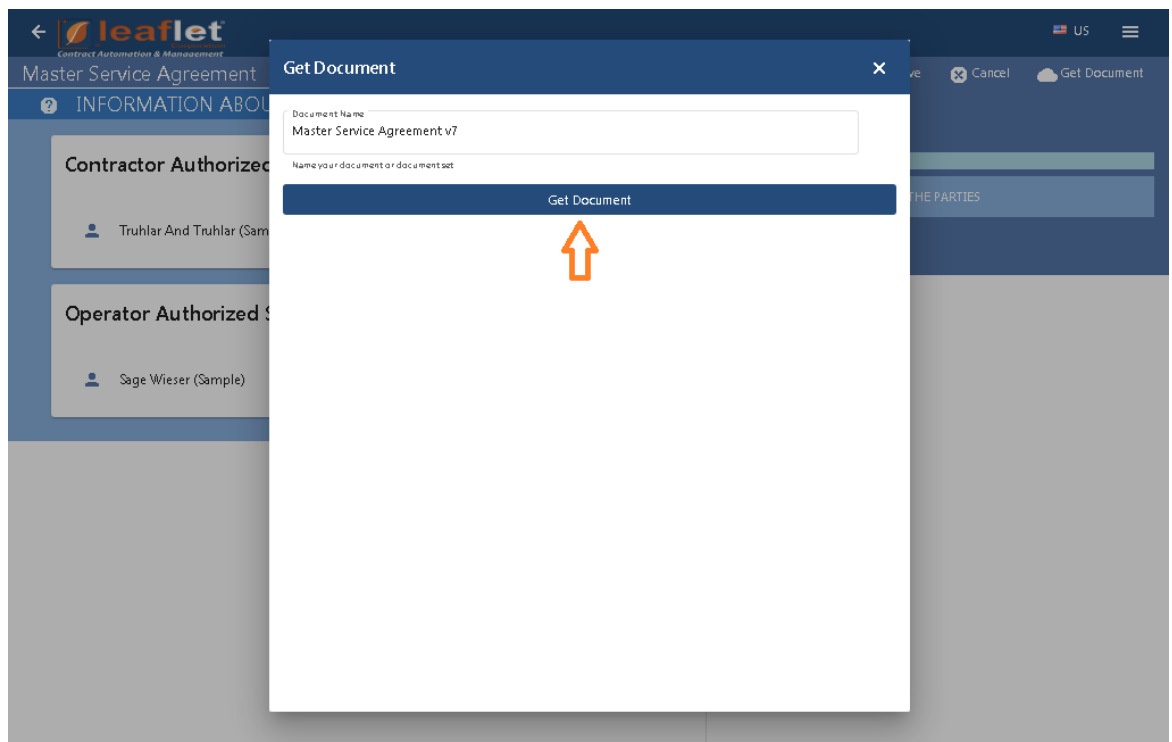
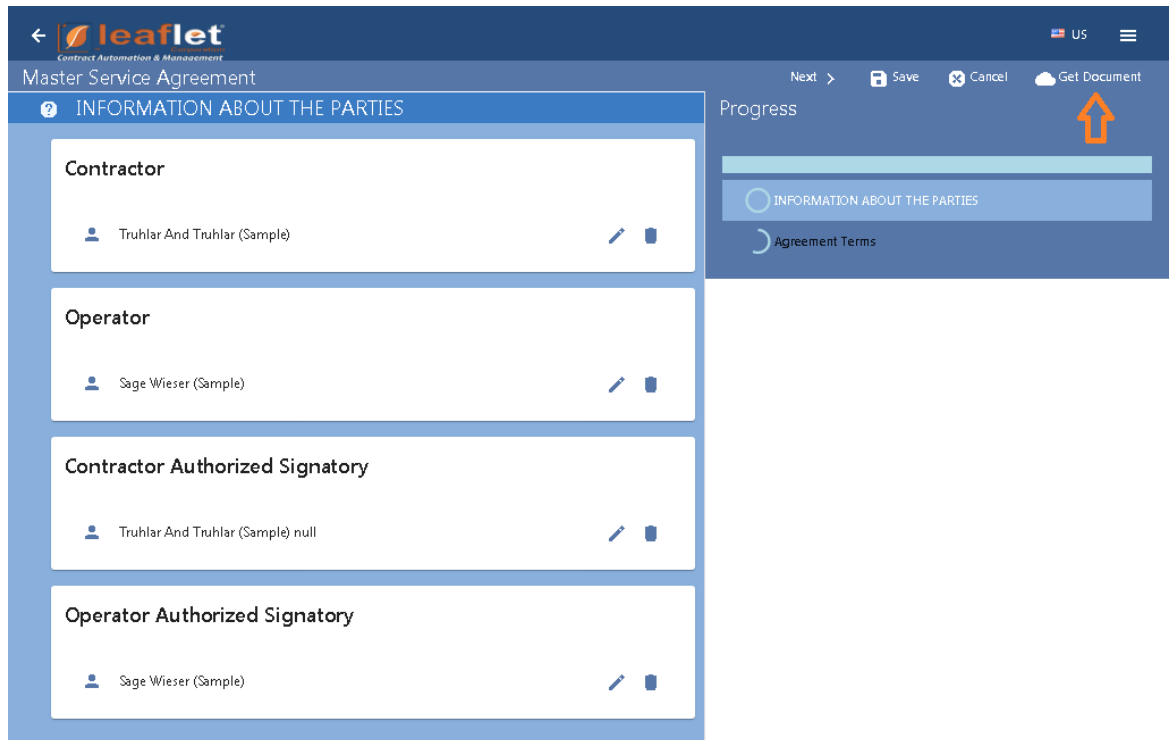
External Object ×

Select Additional Objects using the drop-down menus below.
Only fields that are used in the Leaflet Questionnaire are available for selection.

Object	Select an Object
Contacts	Select Sage Wieser (Sample) ▾
Deals	Select Truhlar And Truhlar A... ▾

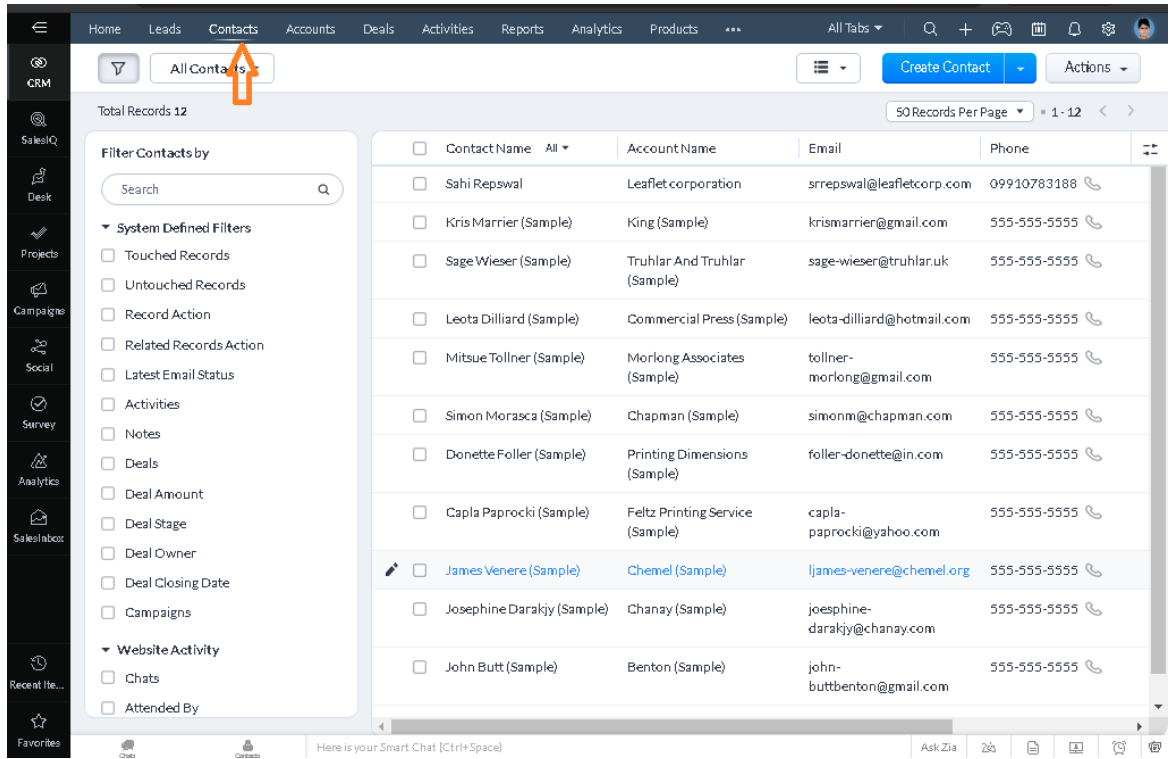


Fill the Questionnaire, and select get Document. Provide name as desired to your document.



2.2.2 ACCESS THROUGH CONTACTS TAB

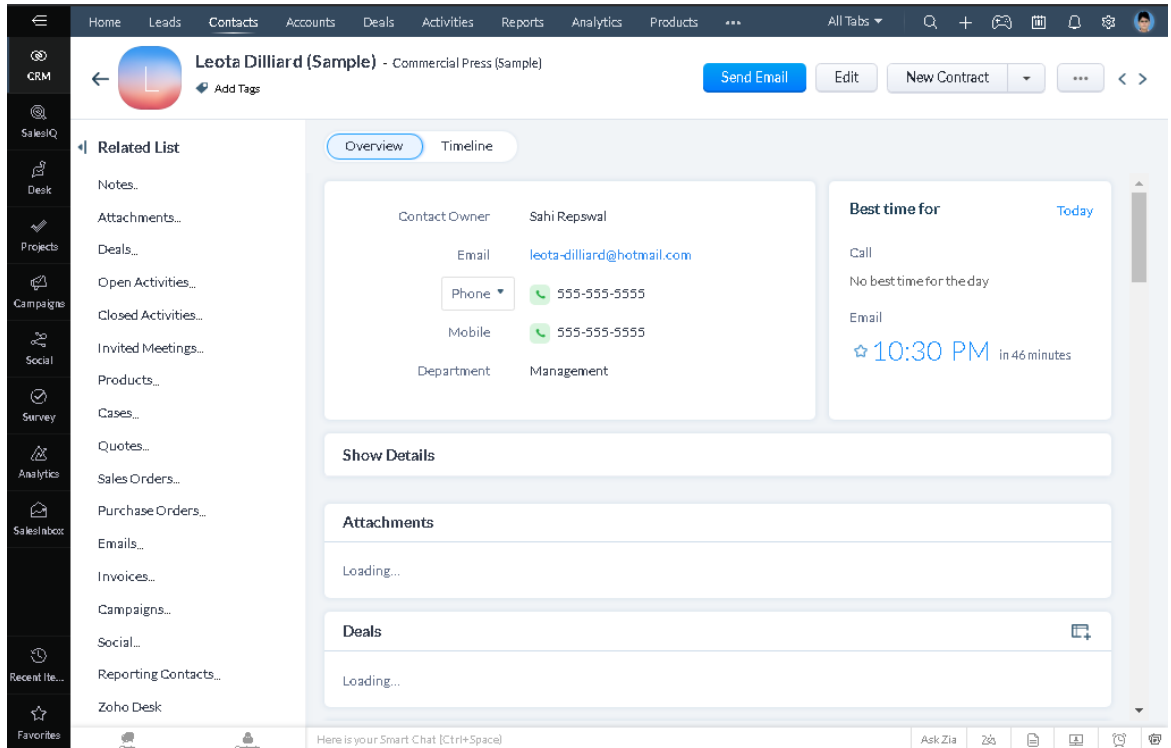
1. Click on the "Contacts" tab and select the requisite contact.



The screenshot shows the CRM interface with the 'Contacts' tab selected. The top navigation bar includes Home, Leads, Contacts, Accounts, Deals, Activities, Reports, Analytics, and Products. The left sidebar contains various CRM modules like CRM, SalesIQ, Desk, Projects, Campaigns, Social, Survey, Analytics, SalesInbox, Recent Items, and Favorites. The main content area displays a list of 12 contacts with columns for Contact Name, Account Name, Email, and Phone. A filter sidebar on the left allows filtering by system-defined filters (e.g., Touched Records, Untouched Records) and website activity (e.g., Chats, Attended By). An orange arrow points to the 'All Contacts' filter button at the top of the list.

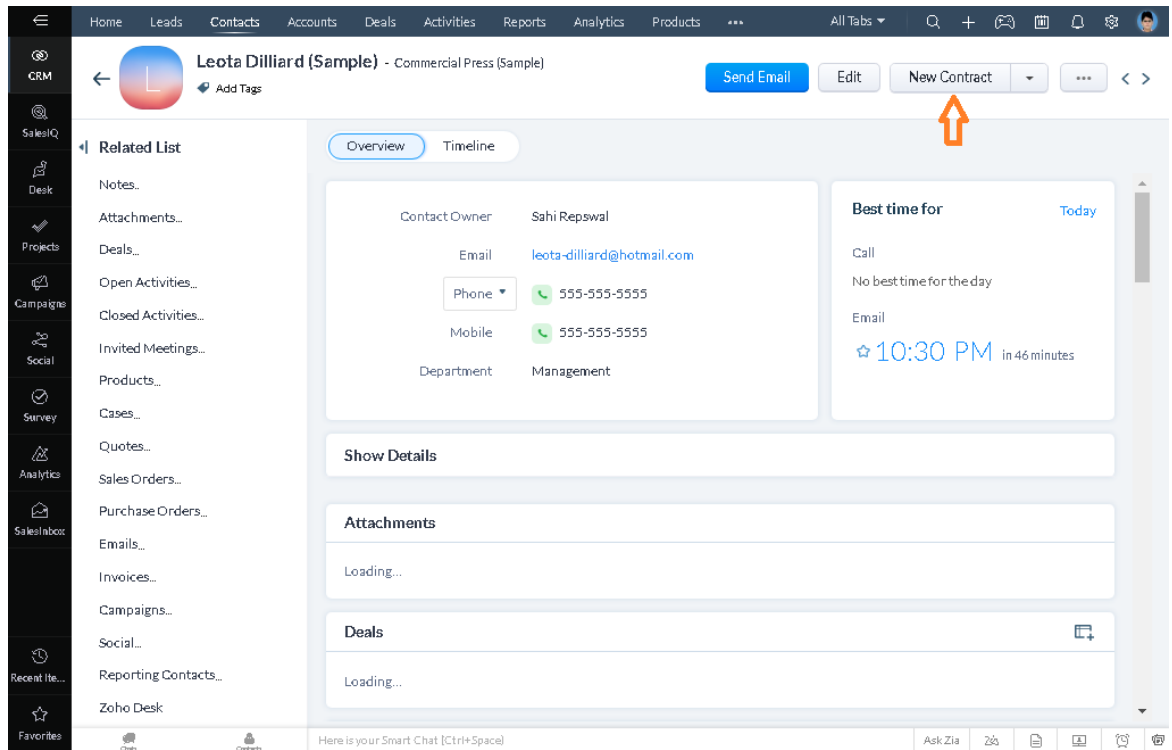
Contact Name	Account Name	Email	Phone
Sahi Repswal	Leaflet corporation	srrepswal@leafletcorp.com	09910783188
Kris Marrier (Sample)	King (Sample)	krismarrier@gmail.com	555-555-5555
Sage Wieser (Sample)	Truhlar And Truhlar (Sample)	sage-wieser@truhlar.uk	555-555-5555
Leota Dilliard (Sample)	Commercial Press (Sample)	leota-dilliard@hotmail.com	555-555-5555
Mitsue Tollner (Sample)	Morlong Associates (Sample)	tollner-morlong@gmail.com	555-555-5555
Simon Morasca (Sample)	Chapman (Sample)	simonm@chapman.com	555-555-5555
Donette Foller (Sample)	Printing Dimensions (Sample)	foller-donette@in.com	555-555-5555
Capla Paprocki (Sample)	Feltz Printing Service (Sample)	capla-paprocki@yahoo.com	555-555-5555
James Venere (Sample)	Chemel (Sample)	ljames-venere@chemel.org	555-555-5555
Josephine Darakjy (Sample)	Chanay (Sample)	joesphine-darakjy@chanay.com	555-555-5555
John Butt (Sample)	Benton (Sample)	john-buttbenton@gmail.com	555-555-5555

2. The contact details page will open up.



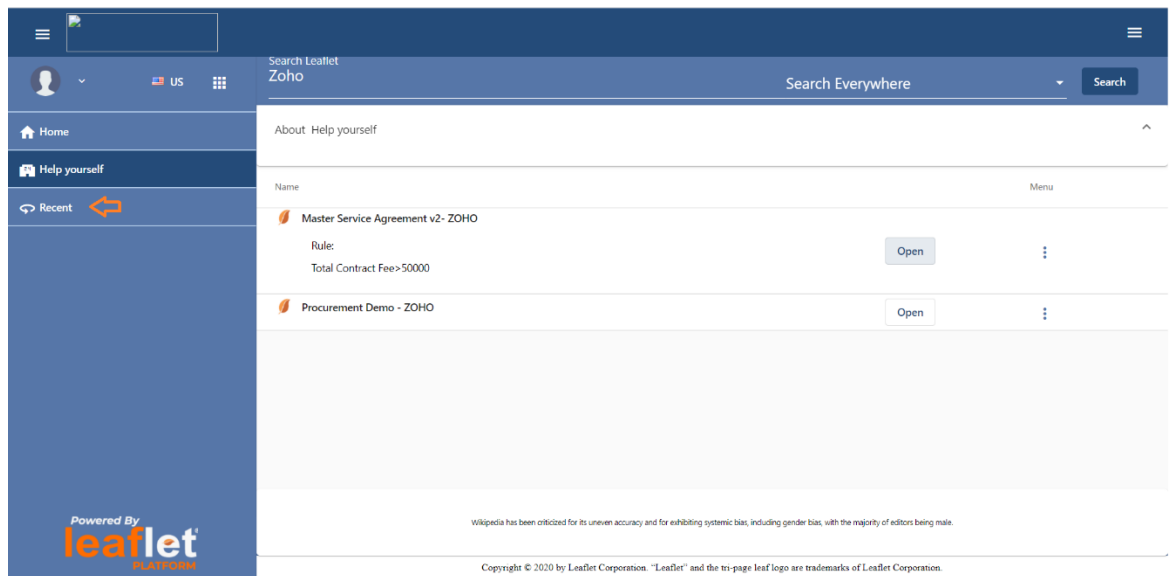
The screenshot shows the contact details page for 'Leota Dilliard (Sample)'. The page header includes navigation tabs (Home, Leads, Contacts, Accounts, Deals, Activities, Reports, Analytics, Products) and a search bar. The left sidebar is the same as in the previous screenshot. The main content area displays the contact's profile, including a 'Related List' on the left and a 'Best time for' section on the right. The 'Best time for' section shows 'Call' with 'No best time for the day' and 'Email' with a star icon and '10:30 PM in 46 minutes'. Below this, there are sections for 'Show Details', 'Attachments', and 'Deals'. The 'Send Email', 'Edit', and 'New Contract' buttons are visible at the top right of the contact details area.

4. Click on the "New Contract" button to go to the Leaflets landing page.



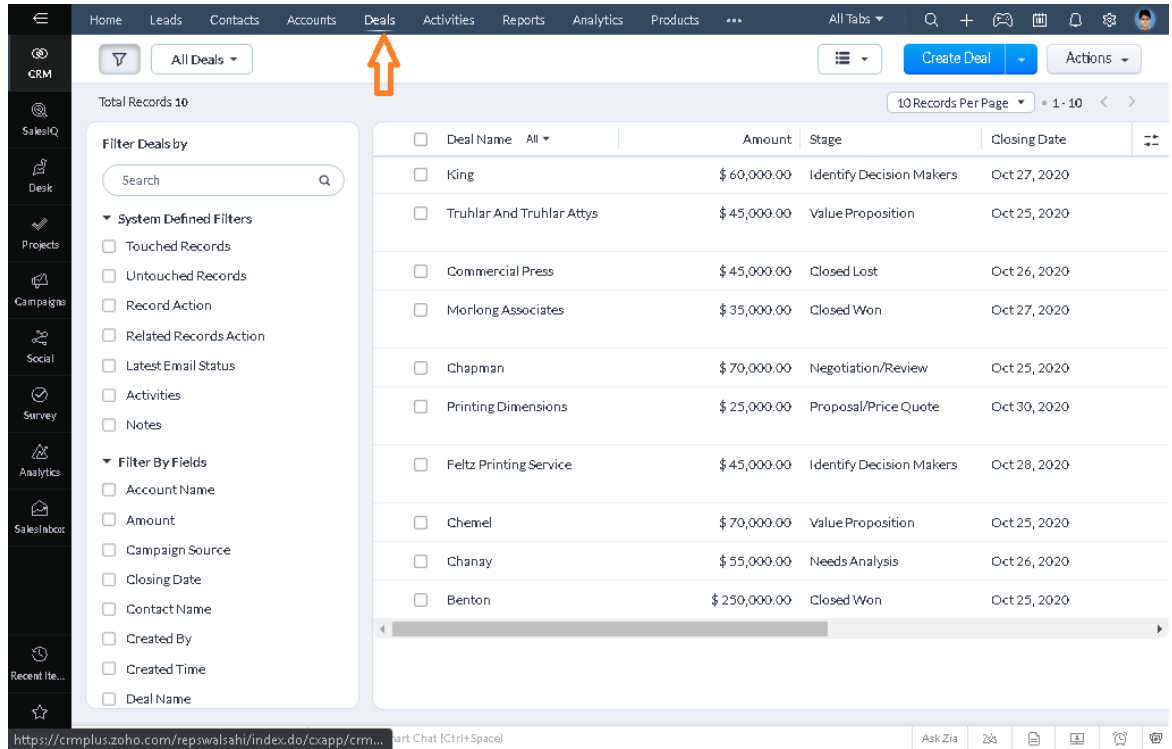
Repeat the steps as mentioned for “Accounts” in above section

- Deals submitted through “Contacts/ Accounts/ Deals/ Users/ Leads” tab can be regenerated at any time by clicking on either “Recent” button.



2.2.3 ACCESS THROUGH DEALS TAB

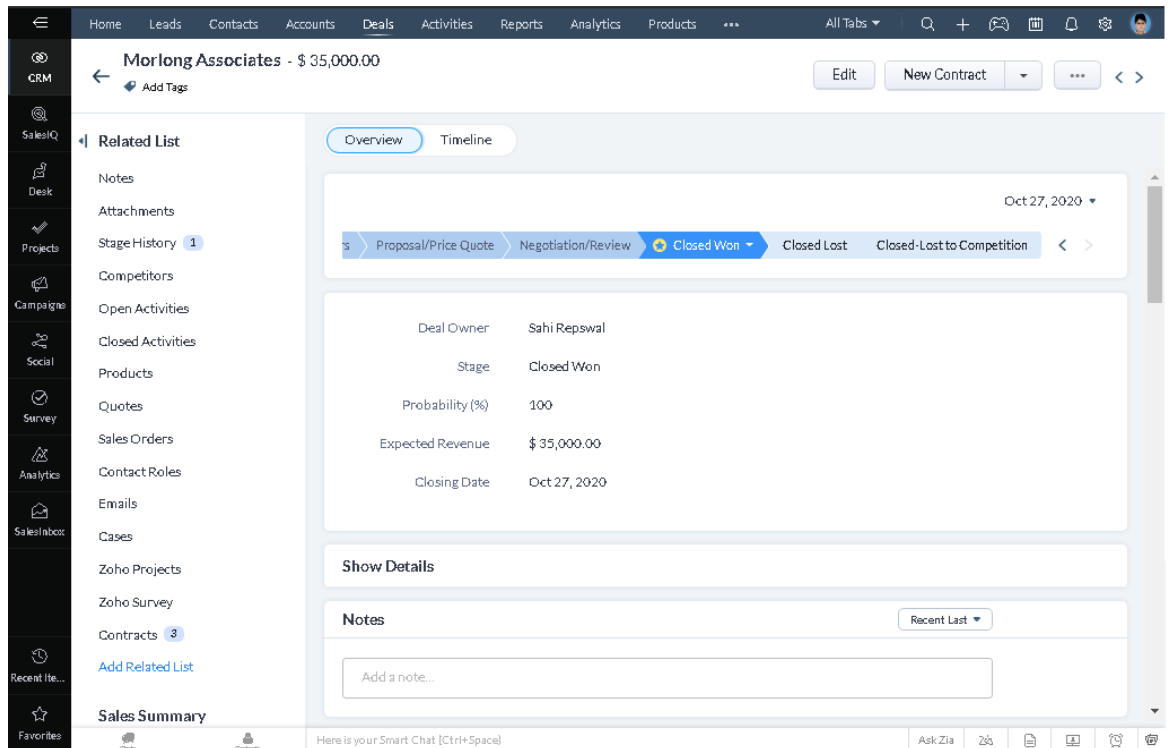
1. Click on the “Deals” tab and select the requisite deal.



The screenshot shows the Zoho CRM interface with the 'Deals' tab selected. An orange arrow points to the 'Deals' tab in the top navigation bar. The main content area displays a list of deals with the following columns: Deal Name, Amount, Stage, and Closing Date. The 'Morlong Associates' deal is highlighted in blue.

Deal Name	Amount	Stage	Closing Date
King	\$ 60,000.00	Identify Decision Makers	Oct 27, 2020
Truhlar And Truhlar Attys	\$ 45,000.00	Value Proposition	Oct 25, 2020
Commercial Press	\$ 45,000.00	Closed Lost	Oct 26, 2020
Morlong Associates	\$ 35,000.00	Closed Won	Oct 27, 2020
Chapman	\$ 70,000.00	Negotiation/Review	Oct 25, 2020
Printing Dimensions	\$ 25,000.00	Proposal/Price Quote	Oct 30, 2020
Feltz Printing Service	\$ 45,000.00	Identify Decision Makers	Oct 28, 2020
Chemel	\$ 70,000.00	Value Proposition	Oct 25, 2020
Chanay	\$ 55,000.00	Needs Analysis	Oct 26, 2020
Benton	\$ 250,000.00	Closed Won	Oct 25, 2020

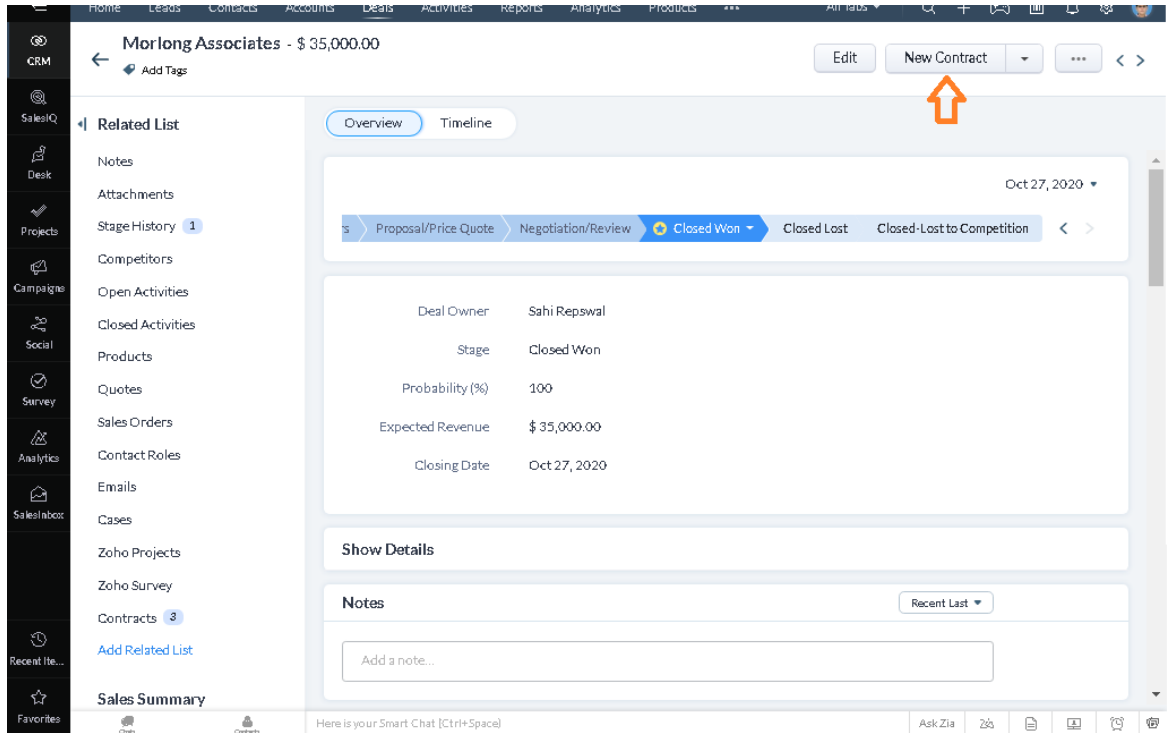
2. The deal details page will open up.



The screenshot shows the Zoho CRM interface with the 'Deal Details' page for 'Morlong Associates - \$ 35,000.00'. The page displays a timeline of stages: Proposal/Price Quote, Negotiation/Review, Closed Won, Closed Lost, and Closed-Lost to Competition. The 'Closed Won' stage is highlighted in blue.

Field	Value
Deal Owner	Sahi Repswal
Stage	Closed Won
Probability (%)	100
Expected Revenue	\$ 35,000.00
Closing Date	Oct 27, 2020

6. Click on the “New Contract” button to go to the Leaflets landing page.



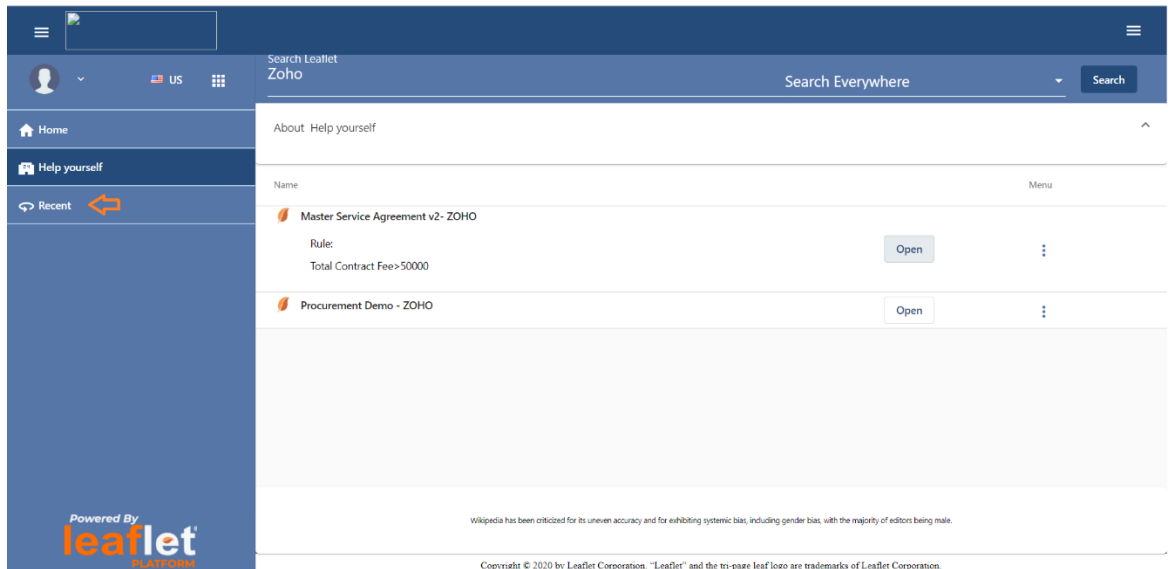
The screenshot shows the CRM interface for a contract titled "Morlong Associates - \$ 35,000.00". The top navigation bar includes tabs for Home, Leads, Contacts, Accounts, Deals, Activities, Reports, Analytics, and Products. The left sidebar contains various CRM modules like CRM, SalesIQ, Desk, Projects, Campaigns, Social, Survey, Analytics, Sales Inbox, and Favorites. The main content area shows a contract overview with a timeline (Proposal/Price Quote, Negotiation/Review, Closed Won, Closed Lost, Closed-Lost to Competition) and a table of key details:

Deal Owner	Sahi Repswal
Stage	Closed Won
Probability (%)	100
Expected Revenue	\$ 35,000.00
Closing Date	Oct 27, 2020

An orange arrow points to the "New Contract" button in the top right corner of the contract record.

Repeat the steps as mentioned for “Accounts” in above section

7. Deals submitted through “Contacts/ Accounts/ Deals/ Users/ Leads” tab can be regenerated at any time by clicking on either “Recent” button.



The screenshot shows the CRM interface with the "Recent" tab selected. The top navigation bar includes a search bar and a "Search Everywhere" dropdown. The left sidebar shows the "Recent" tab highlighted with an orange arrow. The main content area displays a list of deals:

Name	Menu
Master Service Agreement v2- ZOHO Rule: Total Contract Fee > 50000	Open
Procurement Demo - ZOHO	Open

The footer of the page includes the Leaflet logo and copyright information: "Copyright © 2020 by Leaflet Corporation. 'Leaflet' and the in-page leaf logo are trademarks of Leaflet Corporation."

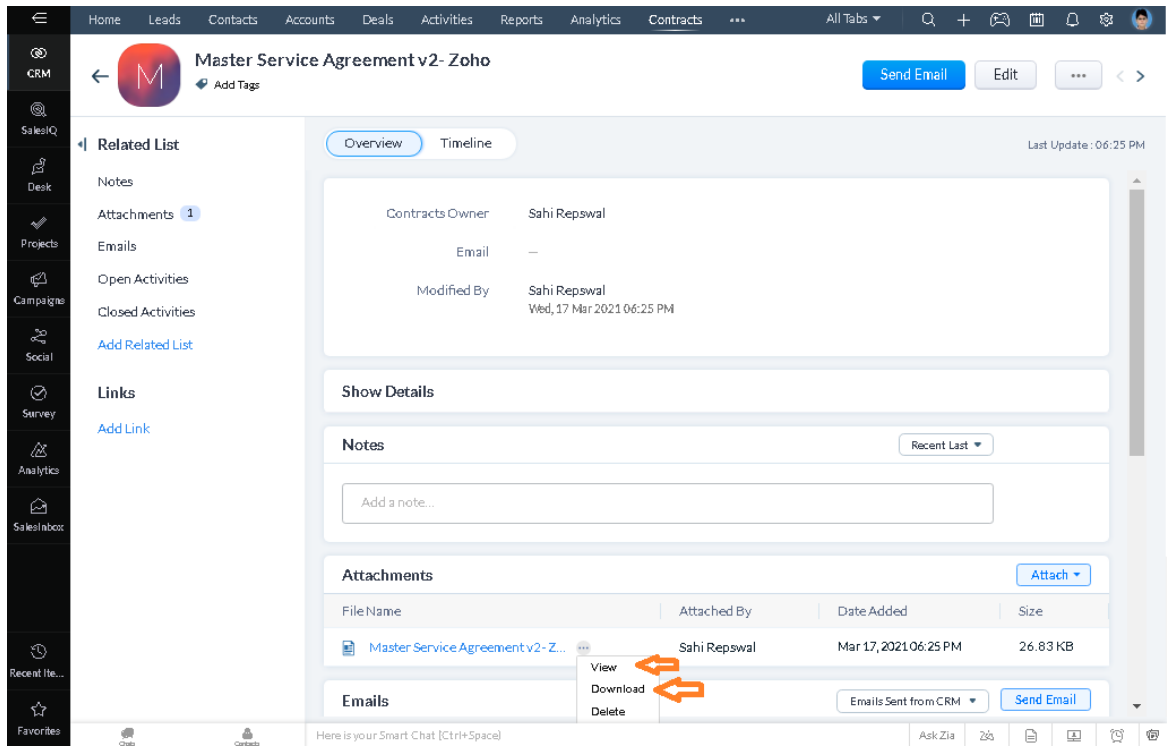
2.3 GENERATED CONTRACTS ON ZOHO

The generated documents/contracts will also be all available under the “Contracts” tab.

The screenshot shows the Zoho CRM interface for the 'Contracts' tab. The top navigation bar includes tabs for Home, Leads, Contacts, Accounts, Deals, Activities, Reports, Analytics, and Contracts. The 'Contracts' tab is highlighted with an orange arrow. Below the navigation bar, there is a search bar and a 'Create Contracts' button. The main area displays a list of contracts with columns for Contract Name, Email, Contracts Owner, and Modified Time. A filter sidebar is visible on the left, showing system-defined filters and filter-by-fields options.

<input type="checkbox"/>	Contract Name	All	Email	Contracts Owner	Modified Time
<input type="checkbox"/>	Master Service Agreement v2-Zoho			Sahi Repswal	Mar 17, 2021 06:25 PM
<input type="checkbox"/>	Master Service Agreement 163 v3			Sahi Repswal	Mar 16, 2021 04:30 PM
<input type="checkbox"/>	Master Service Agreement 163			Sahi Repswal	Mar 16, 2021 02:57 PM
<input type="checkbox"/>	Master Service Agreement xcv			Sahi Repswal	Mar 16, 2021 02:51 PM
<input type="checkbox"/>	Master Service Agreement 123213			Sahi Repswal	Mar 12, 2021 05:31 PM
<input type="checkbox"/>	Master Service Agreement nnnmm			Sahi Repswal	Mar 12, 2021 05:26 PM
<input type="checkbox"/>	Master Service Agreement 123212			Sahi Repswal	Mar 12, 2021 05:24 PM
<input type="checkbox"/>	Master Service Agreement deal v2 113			Sahi Repswal	Mar 11, 2021 08:13 PM
<input type="checkbox"/>	Master Service Agreement V3 113			Sahi Repswal	Mar 11, 2021 08:28 PM
<input type="checkbox"/>	Master Service Agreement			Sahi Repswal	Mar 11, 2021 06:40 PM

And if user wants to download/ view the generated documents then user can click on the document/contract name. From there use the context menu drop down. Select View/ Download.



2.4 LEAFLET MAPPING

User can map the Accounts, Contacts, Deals etc. with the questions in the leaflet questions to auto-populate the information already saved in Zoho. Please note that the users can always over-ride auto-populated fields by changing with their desired value.

If such mapping has been done, the user will get the following additional screen on selecting the Leaflet from landing page

2.4.1 MAPPING ON PORTAL

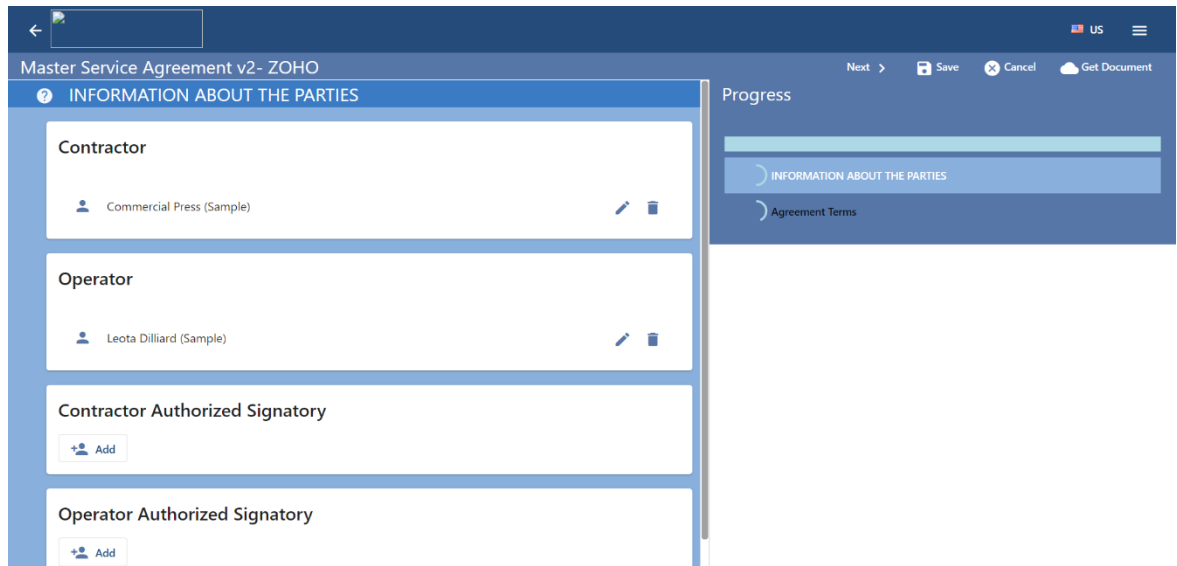
External Object ✕

Select Additional Objects using the drop-down menus below.
Only fields that are used in the Leaflet Questionnaire are available for selection.

Object	Select an Object
Accounts	Select ▼
Contacts	Select ▼

GO

1. Select the “Object” of Accounts/Contacts/Deals etc., which the user wants to be auto-populated in the leaflet from the dropdown.
2. Once the selection has been done, click on “Go” button to proceed to Leaflet UI.
3. On the Leaflet UI page, the values mapped will be populated by default in the required questions, as shown in image below.

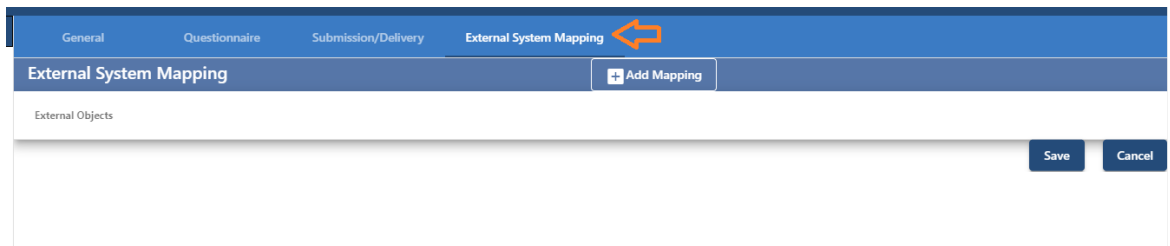


4. User can edit the values of contact by using the edit pencil given on the right or directly typing in the fields for rest question type.

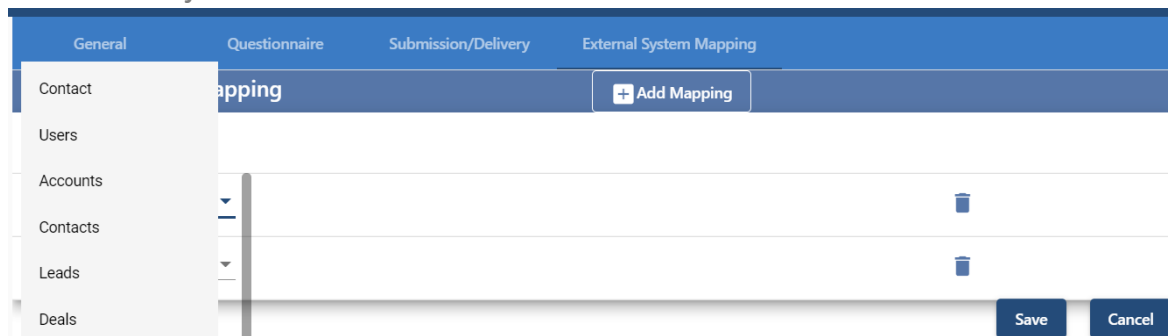
2.4.2 MAPPING IN LEAFLET FACTORY

EXTERNAL SYSTEM MAPPING

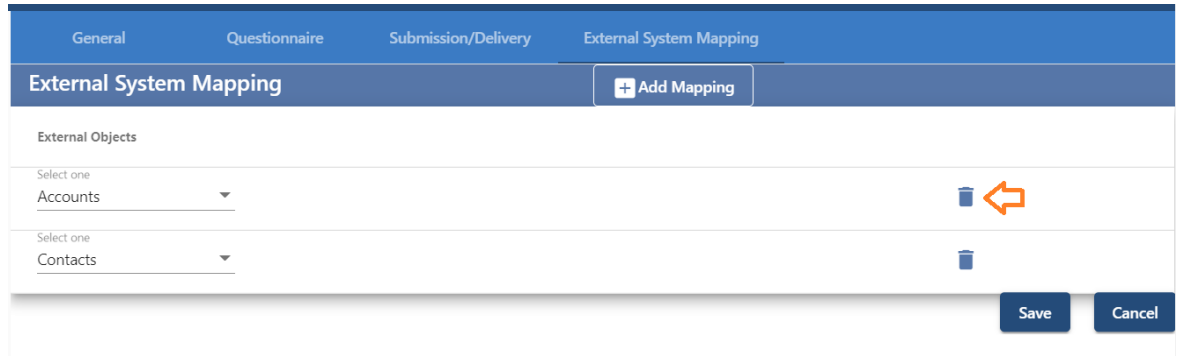
Select tab “External Systems Mapping” in Leaflet Factory, wherein mapping of external objects (Contacts/ Accounts/ Deals etc.) with leaflet questions can be done.






1. Click on ‘Add Mapping’ button to add objects. A dropdown list of External Objects is available for the user.



2. Select an Object. To add another Object, click again on “Add mapping” button. An object can be deleted using the delete button provided alongside each object.



General	Questionnaire	Submission/Delivery	External System Mapping
External System Mapping + Add Mapping			
External Objects			
Select one	Accounts		 
Select one	Contacts		
			Save Cancel

3. Click on Save to save the External Objects.

MAPPING INDIVIDUAL QUESTIONS

Once the objects have been added to the Leaflet Factory, user can map the questions individually with pre-defined object fields (as shown in image below), by clicking on the edit pencil provided along-with each question under the “Questionnaire” tab.

↓×

GeneralQuestionnaireSubmission/DeliveryExternal System Mapping

Master Service Agreement v2- ZOHO

+ Add AllRemove All↑↓ Reorder

INFORMATION ABOUT THE PARTIES

☰ Contractor

Address

City

State

Zip

Work Phone

☆

☆

☆

☆

☆

☆

⋮

⋮

⋮

⋮

⋮

⋮

☰ Operator

Address

City

State

☆

☆

☆

⋮

⋮

⋮

Master Service Agreement v2- ZOHO

◀ Effective Date

◀ Contractor

Address

City

State

Zip

Work Phone

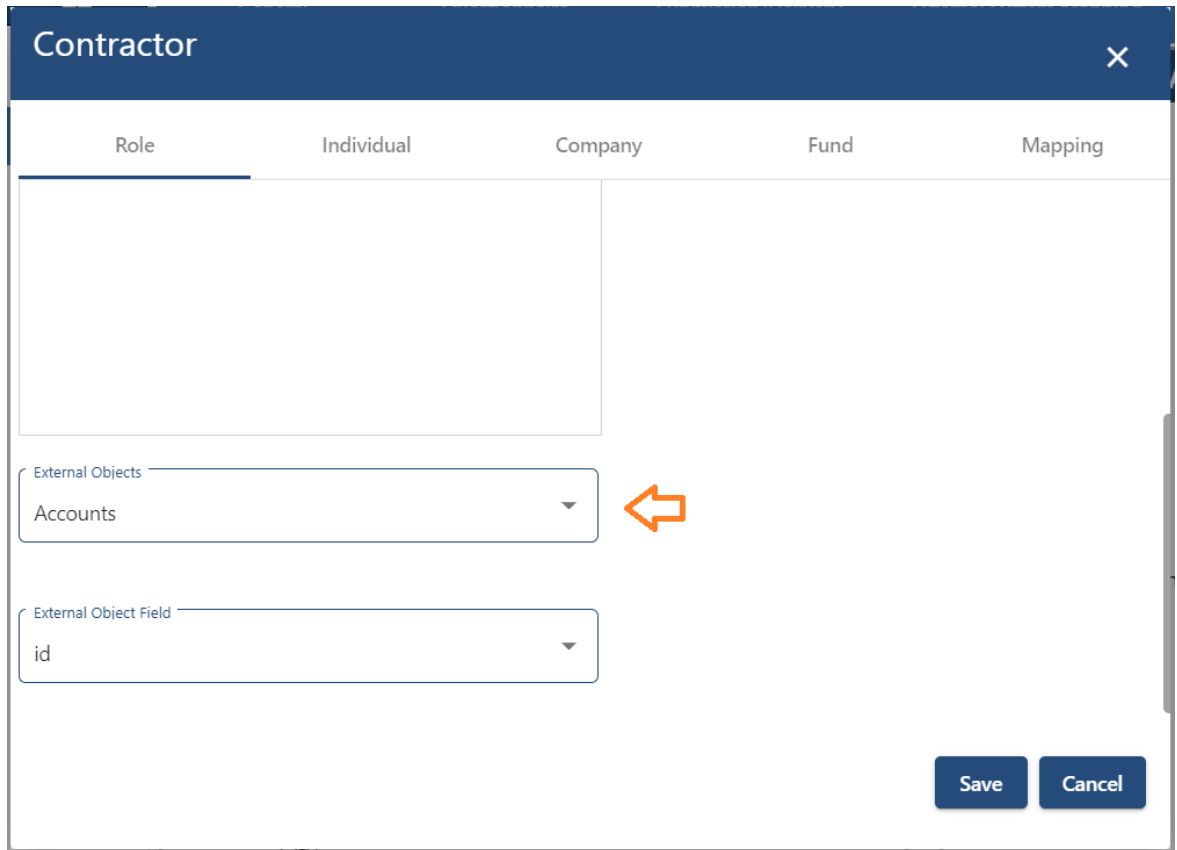
◀ Operator

Address

City

State

Zip



Contractor

Role Individual Company Fund Mapping

External Objects
Accounts

External Object Field
id

Save Cancel

The external Object Field dropdown will display all the fields which have been set up in the Admin module for that specific External Object.



Account_Number

Billing_Street

Billing_Code

Billing_City

Billing_State

Annual_Revenue

Once selected, click on “Save” to update.