

Adam Stone

From: Ryan Brown [ryanbrown@medesign.tv]
Sent: Thursday, November 06, 2008 8:53 AM
To: Adam Stone
Subject: Zoho Question

Hi Adam,

I have a question on Zoho.

I need to be able to track particular accounts and associate them to various events and items they are interested in. What I also need to be able to do is export a list of accounts that fit a particular criteria.

For example – Company XYZ.

This company is a d-tools training lead, they are also a lead for financial management services and Crestron programming. Certain people in this account have attended our various trainings over the years, such as DTU, Home Theater course at Cedia 2007, EHX Theater Bootcamp 2006, etc...

The most important thing for me is the ability to pull up a list and export the accounts/ contacts that fit the particular profile so that I can update my list through my email service. Also to be able to quickly pull up a 'call list' for particular interests.

I like the idea of tagging at the account level and at the contact level so that is a contact leaves a company, the interest shown by that individual (by attending a training or something) is not lost with the contact but remains with the account. I also see the importance of having that tagged at the contact level so we know exactly who completed that activity.

Make sense?

Thanks,

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