IT technicians · Zoho One optimization

Zoho CRM

User and Administrator Manual

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Index — English version

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PART 1 — USER GUIDE

Part 1 — User Guide

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1. Introduction and access

1.1 About this manual

This manual describes the Zoho CRM features available to users and the functions reserved for administrators, as available in September 2026 in the Zoho CRM for Everyone interface.

Available features vary by edition (Standard, Professional, Enterprise, Ultimate) and by your organization's configuration.

1.2 What is Zoho CRM?

Zoho CRM is Zoho's customer relationship management software. It centralizes your leads, contacts, accounts and deals, tracks every interaction (emails, calls, meetings), automates sales processes and provides reports and forecasts. With CRM for Everyone, other teams (marketing, service, finance, HR) can also work in the CRM through Teamspaces.

1.3 Signing in

1. Go to https://crm.zoho.com (or https://crm.zohocloud.ca if your organization is hosted in the Canadian data center).
2. Sign in with your Zoho account or your organization's single sign-on.
3. If you use Zoho One, open the app launcher and select CRM.
4. Complete multi-factor authentication with Zoho OneAuth if required.

> **Nuagix tip —** Install the Zoho CRM mobile app and, if your organization uses it, the Zoho CRM extension for Gmail or Outlook.

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2. Interface and navigation

2.1 Interface elements

Element	Purpose
Sidebar	Teamspaces and the modules you can access
Home	Personalized dashboard: today's tasks, meetings, deals, metrics
List view	A module's records, with filters and custom views
Record detail page	Details, timeline, related lists, notes, attachments
Global search	Search all modules by name, email, phone
Ask Zia	Ask a question in plain language or run an action
Setup	Settings, mostly reserved for administrators

2.2 View types

- List: classic table with customizable columns
- Kanban: cards grouped by stage or field value, moved by drag and drop
- Canvas: visual layout designed by the administrator (records and lists)
- Tiles, calendar and map, depending on the module

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3. Modules and records

3.1 Standard modules

Module	Content
Leads	Interested people or companies, not yet qualified
Contacts	People you do business with
Accounts	Companies or organizations
Deals	Sales opportunities, with amount, stage and expected closing date
Activities	Tasks, meetings and calls
Products, Quotes, Sales Orders, Invoices	Catalogue and sales documents (depending on edition)
Campaigns, Cases, Solutions, Vendors	Optional modules depending on your processes

3.2 Creating and managing a record

1. Open the module and click Create (+).
2. Fill in the mandatory fields (marked with an asterisk) and other useful fields.
3. Save; or use Save and New to enter several records.
4. On the record, add notes, attachments, tasks and activities.
5. Use Clone to create a similar record, and Edit to update.

3.3 Converting a lead

1. Open the qualified lead and click Convert.
2. Zoho CRM creates a contact and an account (or links an existing account to avoid duplicates).
3. Check Create a Deal to open an opportunity; enter amount, stage and closing date.
4. Notes, activities and attachments carry over to the new records.

> **Nuagix tip —** Convert a lead as soon as it is qualified: conversion and pipeline reports depend on it.

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4. Views, search and mass actions

4.1 Filtering and creating views

1. In a list view, use the filter panel on the left (fields, activities, tags).
2. To keep a filter, click Create View.
3. Choose criteria, displayed columns and sort order.
4. Share the view with other users, roles or groups, if you have permission.

4.2 Mass actions

- Mass update a field on several records
- Change owner, add tags, delete
- Send a mass email from a template
- Create tasks or add to a campaign
- Export the selection (depending on your permissions)

4.3 Importing data

1. Module > … menu > Import.
2. Choose the file (CSV, XLSX) and destination module.
3. Map columns to CRM fields.
4. Set duplicate handling: skip, update or create (key: email, for example).
5. Run the import and review the history for errors.

> **Caution —** Always run a test with 10 to 20 rows before a full import. An import can be undone for a limited time.

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5. Deals, pipeline and processes

5.1 Managing the pipeline

- Each deal moves through stages (e.g., Qualification, Proposal, Negotiation, Closed Won, Closed Lost) with a probability
- Multiple pipelines possible (e.g., new customers, renewals, projects)
- Kanban view to advance deals by drag and drop
- Mandatory loss reason to better analyze lost sales
- Zia risk signals and predictions on deals

5.2 Following a guided process (Blueprint)

When a Blueprint process is active, the record shows the available transitions (e.g., Send Proposal). Click the transition: the CRM asks for the fields required at that step and applies the planned actions (email, task, update). You cannot skip steps.

5.3 Wizards

Some creation forms are split into successive screens (wizards) to guide data entry for complex processes. Follow the screens in order; the fields shown depend on your answers.

5.4 Forecasts

- Sales targets per period, per user or per role
- Comparison of target, achieved and pipeline
- Adjustments by managers following the role hierarchy

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6. Activities and communications

6.1 Tasks, meetings and calls

- Tasks with due date, priority and reminders
- Meetings synced with your calendar (Zoho, Google, Microsoft 365) and Zoom or Zoho Meeting links
- Calls logged manually or automatically with built-in telephony (PhoneBridge)
- Calendar view and “My Open Activities” list

6.2 Built-in email

1. Set up your mailbox in My Settings > Email (Zoho Mail, Gmail, Outlook or IMAP).
2. Exchanges with your leads and contacts appear in each record's Emails tab.
3. Send an email from the record using a template, with open and click tracking.
4. Schedule the send or use Zia to draft a reply.

6.3 SalesSignals and sequences

- SalesSignals: real-time notifications when a customer opens an email, visits your site, engages on social media or submits a form
- Cadences: automatic follow-up sequences of emails, calls and tasks
- Macros: run several actions in one click (e.g., email + task + field update)

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7. Sales documents and files

7.1 Quotes, sales orders and invoices

1. From a deal, click Create Quote.
2. Add products, quantities, discounts and taxes (GST and QST).
3. Generate the PDF from a branded print template.
4. Send it to the customer, or for e-signature with Zoho Sign.
5. Convert the accepted quote into a sales order, then an invoice, or push it to Zoho Books.

> **Note —** If your organization uses Zoho Books or Zoho Finance, invoices are usually managed in Books for accounting.

7.2 Files

- Attachments on every record
- Documents linked to Zoho WorkDrive, Google Drive or OneDrive
- Mail Merge templates with Zoho Writer

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8. Zia, the AI assistant

8.1 Zia features

- Ask Zia: plain-language questions ("How many deals did I win this quarter?") and quick record creation
- Predictions: likelihood of a lead converting or a deal being won
- Best time to contact each customer
- Anomaly detection in your metrics
- Lead and account data enrichment
- Drafting and summarizing emails, notes and calls

8.2 Zia Agents

Agent	Role
SDR Agent	Lead research, qualification and first contact
Sales Coach	Real-time advice and feedback within deals
Quote Creation	Generates a quote from deal data
Account Manager	Spots at-risk accounts and suggests retention actions

> **Note —** Agents deployed by the administrator appear in the sidebar of the relevant modules. Always review their proposals before applying them.

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9. Reports and dashboards

9.1 Creating a report

1. Reports tab > Create Report.
2. Choose the primary module and related modules (e.g., Deals with Accounts).
3. Choose the type: tabular, summary, matrix or join.
4. Select columns, groupings and criteria (e.g., closing date this quarter).
5. Add a chart, save it in a folder and share it as needed.
6. Schedule automatic email delivery (daily, weekly, monthly).

9.2 Dashboards

- Components: charts, KPIs, gauges, funnels, heat maps, comparisons
- Team or user dashboards
- Clickable drill-down to records
- Advanced analytics with Zoho Analytics, as needed

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10. Teamspaces (CRM for Everyone)

10.1 Principles

Element	Description
Teamspace	A space for one team (Sales, Marketing, Service, Finance), managed by its lead
Team modules	Modules built for a team's needs (e.g., Customer Onboarding, Contracts)
Requester modules	One team submits a request to another (e.g., contract request to Legal) and tracks progress
Teamspace admin	Manages members, modules and views of their space

10.2 Submitting a request to another team

1. Open the relevant team's requester module.
2. Click New Request and fill in the form.
3. Track the request status in My Requests.
4. Exchange with the team through comments on the record.

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11. Mobile app

11.1 Features

- View and edit records, even offline
- Log calls and meetings, with transcribed voice notes
- Scan a business card to create a lead
- See nearby customers on a map and plan a route
- Receive notifications and SalesSignals
- Use Ask Zia by voice

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12. Best practices

12.1 Nuagix recommendations

- Log every interaction in the CRM the same day: if it is not in the CRM, it did not happen
- Keep deal closing dates and stages up to date every week
- Search before creating to avoid duplicates
- Use email templates and macros to save time
- Schedule a follow-up task at the end of every exchange
- Review your reports and personal dashboard every Monday
- For Quebec customers, enter data in French and respect each contact's preferred language

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Part 2 — Administrator Guide

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13. Users, roles and profiles

13.1 Key concepts

Element	Controls
Profile	What a user can do: visible modules, create, edit, delete, export, setup access
Role	Which data they see: hierarchy (a manager sees subordinates' data)
Group	Set of users for sharing and assignment
Territory	Geographic or segment split, depending on edition
CRM administrator	Administrator profile: full setup access

13.2 Adding a user

1. Setup > Users and Control > Users > New User.
2. Enter the name and email address.
3. Assign the role (position in the hierarchy) and the profile (permissions).
4. Add them to the appropriate Teamspaces and groups.
5. The user receives an invitation; they use a license once active.

> **Note —** In Zoho One, first add the user in the Zoho One console and assign them the CRM app.

13.3 When an employee leaves

1. Transfer their records to another user (Setup > Users > Deactivate > data transfer).
2. Update assignment rules, workflows and approvals that name them.
3. Reassign their open tasks and scheduled reports.
4. Deactivate the user to free the license.

> **Caution —** Deleting a user without transferring their data can leave records without an owner and break automations.

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14. Data sharing

14.1 Sharing levels

Mechanism	Effect
Organization-wide default permissions	Private, Read Only or Public (read/write/delete), per module
Role hierarchy	Superiors see their subordinates' data
Sharing rules	Open access to specific records for other roles or groups
Territories	Access based on region, industry or another criterion
Field-level security	Hide or make certain fields read-only by profile

> **Nuagix tip —** Start with Private for sensitive modules and open access with targeted sharing rules: it is safer than the reverse.

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15. Customization

15.1 Modules, fields and layouts

1. Setup > Customization > Modules and Fields.
2. Choose the module and layout to edit.
3. Drag in the fields you need (text, picklist, date, currency, lookup, formula, subform, etc.).
4. Set properties: mandatory, unique, tooltip, per-profile permissions.
5. Save; create multiple layouts by profile or process if needed.

15.2 Other options

- Layout rules: show fields or sections based on conditions
- Validation rules: prevent saving inconsistent data
- Custom modules, built manually or by Zia from a description
- Canvas: design the look of records and lists (including from an image)
- Wizards: multi-screen forms
- Related lists, custom buttons and links
- Email, print and mail merge templates

Caution — Before deleting a field, check whether it is used in reports, workflows, integrations or web forms.

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16. Process automation

16.1 Automation tools

Tool	Use
Workflow rules	Trigger actions (email, task, update, webhook, function) on create, edit or a date
Assignment rules	Automatically assign leads or cases (round robin, criteria, territory)
Blueprint	Enforce a step-by-step process with required fields and actions at each transition
Approval processes	Get a discount, quote or deal approved before moving on
Cadences	Automatic follow-up sequences (emails, calls, tasks)
CommandCenter (Journeys)	Orchestrate a full customer journey across modules and apps
Deluge functions and schedules	Custom logic, scheduled jobs, API calls

16.2 Creating a workflow rule

1. Setup > Automation > Workflow Rules > Create Rule.
2. Choose the module and trigger (create, edit, field date, score).
3. Define conditions (e.g., Lead Source = Website AND Province = Quebec).
4. Add instant and scheduled actions (e.g., welcome email, task in 2 days).
5. Save and test with a dummy record.

> **Nuagix tip —** Document every automation (purpose, trigger, owner) in a shared list: it is essential for CRM maintenance.

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17. Data management

17.1 Data quality

- Duplicate management: detection rules and record merging
- Unique fields (email, customer number) to prevent duplicates
- Zia data enrichment
- Import history and import undo

17.2 Backup and storage

- Data Backup: scheduled full export (Setup > Data Administration > Backup)
- Recycle Bin: restore deleted records for a limited time
- Monitoring of data and file storage

Caution — Schedule a regular backup and store it in a secure location (e.g., a restricted WorkDrive folder).

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18. Channels and integrations

18.1 Zoho integrations

Application	Typical use
Zoho Forms	Create leads or contacts from web forms
Zoho Campaigns / Marketing Automation	Sync lists and marketing engagement
Zoho SalesIQ	Chat, visitor tracking and lead creation
Zoho Desk	See support tickets on the customer record
Zoho Books / Finance	Customers, quotes, invoices and payments
Zoho Sign	E-signature for quotes and contracts
Zoho WorkDrive	Document folders per account or deal
Zoho Analytics	Advanced reports and cross-app dashboards

18.2 Other channels

- Email: Zoho Mail, Microsoft 365, Gmail, IMAP
- Google and Microsoft 365 calendars; Zoom and Zoho Meeting
- Telephony (PhoneBridge): 3CX, RingCentral and more
- Social networks, WhatsApp and SMS
- Zoho Marketplace: ready-to-install extensions
- REST API (OAuth 2.0), webhooks and connections
- Customer and partner portals

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19. Security and compliance

19.1 Security controls

- Multi-factor authentication and single sign-on (SAML) via Zoho Accounts / Zoho Directory
- Access restriction by IP address and login hours
- Encryption of sensitive fields
- Export and print restrictions by profile
- Audit Log: history of user actions
- Hosting in the Canadian data center (zohocloud.ca)

19.2 Privacy and Quebec Law 25

- Enable data privacy settings: consent source and type, contact preferences
- Flag fields that contain personal information
- Handle access, correction and deletion requests
- Set a retention period for inactive leads
- Restrict export to profiles that truly need it

> **Note —** This manual is not legal advice. Confirm your obligations with your legal advisor.

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20. Sandbox and Zia Agents

20.1 Sandbox

1. Setup > Developer Space > Sandbox > New Sandbox.
2. Choose the configuration and, depending on edition, a sample of data to copy.
3. Build and test your changes (fields, workflows, Blueprint) in the sandbox.
4. Deploy validated changes to production, then inform users.

20.2 Deploying a Zia agent

1. Create or choose the agent in Zia Agents (Agent Studio).
2. Deploy it to Zoho CRM: connection using the user's identity, a fixed identity, or as a digital employee (its own role, profile and email).
3. Setup > General > Agents: choose the modules where the agent appears.
4. Limit its permissions to what is strictly needed and monitor its actions in the audit log.

> **Nuagix tip —** Digital employee mode gives full visibility in the audit log: it is the recommended option for agents that change data.

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21. Editions and licenses

21.1 Editions

Edition	For whom
Standard	Small teams: core modules, workflows, reports
Professional	Growing teams: Blueprint, built-in email, inventory, SalesSignals
Enterprise	Organizations: Teamspaces, Canvas, territories, Zia, sandbox, CommandCenter
Ultimate	Advanced needs: built-in Zoho Analytics, higher limits
Zoho One / CRM Plus	CRM included with the suite's other apps

21.2 Tracking usage

Setup > Billing shows the edition, licenses used, storage and credits (API calls, mass emails, Zia credits). Remove licenses from deactivated users.

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22. Deployment checklist

22.1 Before going live

- ☐ Company profile, currency (CAD), time zone and fiscal year configured
- ☐ Roles, profiles and sharing rules defined
- ☐ Users added and Teamspaces created
- ☐ Modules, fields and layouts adapted to your processes
- ☐ Pipeline stages and loss reasons defined
- ☐ Data imported and duplicates cleaned
- ☐ Assignment rules and workflows tested in the sandbox
- ☐ Email, calendar and telephony connected
- ☐ Integrations (Forms, Campaigns, SalesIQ, Books, Sign) configured
- ☐ Privacy and consent settings (Law 25) enabled
- ☐ Backup scheduled
- ☐ Users trained and documentation delivered

> **Nuagix tip —** Nuagix, a Zoho Premium Partner, can support your team with Zoho CRM setup, data migration, integration and training. Book a Zoom meeting: https://nuagix.zohobookings.com/#/andre-martin

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Appendix

A. English-French glossary

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A. English-French glossary

A.1 Interface terms

English (interface)	French
Lead	Piste
Contact	Contact
Account	Compte
Deal	Affaire
Pipeline / Stage	Pipeline / étape
Convert	Convertir
List View	Vue de liste
Layout	Mise en page
Picklist	Liste de choix
Teamspace	Espace d'équipe
Workflow Rule	Règle de workflow
Assignment Rule	Règle d'assignation
Approval Process	Processus d'approbation
Profile	Profil
Role	Rôle
Sharing Rule	Règle de partage
Territory	Territoire
Forecasts	Prévisions
Recycle Bin	Corbeille
Audit Log	Journal d'audit

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