



IT technicians · Zoho One optimization



Zoho One

User and Administrator Manual

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Prepared by Nuagix · September 2026

nuagix.ca · support@nuagix.ca

Zoom meeting: <https://nuagix.zohobookings.com/#!/andre-martin>

Index — English version

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1. Introduction and access

1.1 About this manual

This manual describes how employees use the Zoho One suite and the admin panel functions reserved for administrators, as available in September 2026.

Available apps and features vary by edition (Essentials or Standard), licensing model and the apps your administrator has assigned to you.

1.2 What is Zoho One?

Zoho One is Zoho's complete cloud suite: more than 50 business apps (sales, marketing, customer service, finance, human resources, collaboration, operations, analytics) brought together under a single account, a single admin panel and a single invoice. The apps share the same users and the same security, and are integrated with one another.

For a Quebec SMB, Zoho One often replaces a dozen separate subscriptions and eliminates double data entry between systems.

1.3 Signing in

1. Go to <https://one.zoho.com> (or <https://one.zohocloud.ca> if your organization is hosted in the Canadian data center).
2. Sign in with your organization email address or the single sign-on (SSO) configured by your administrator.
3. Complete multi-factor authentication with the Zoho OneAuth app.
4. The Zoho One launcher opens and shows the apps assigned to you.

Nuagix tip — Install Zoho OneAuth on your phone on day one: it is the simplest multi-factor authentication method and allows push-notification approval.

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2. Interface and launcher

2.1 Interface elements

Element	Purpose
App Launcher	Access to all the apps assigned to you
Personal Space	Your tasks, calendar, email and notifications in one place
Organization Space	Announcements, event calendar, employee directory
Function Spaces	Apps grouped by department (Sales, Service, Finance, HR)
Dashboards	Metrics combining data from several apps
Unified search	Search all apps at once
Admin Panel	Reserved for administrators

2.2 Customizing your launcher

1. Open the app launcher.
2. Pin your most-used apps as favourites.
3. Rearrange them by drag and drop.
4. Choose your default home page (Personal Space or a specific app).
5. In My Account, set the language, time zone and date format.

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3. The suite's apps

3.1 Main categories

Category	Apps
Sales	Zoho CRM, Bigin, SalesIQ, Bookings, Sign, Forms
Marketing	Marketing Automation, Campaigns, Social, Survey, Sites, PageSense, Backstage (events)
Customer service	Zoho Desk, Assist (remote support), Lens, FSM (field service)
Finance	Books, Invoice, Expense, Inventory, Billing, Checkout, Commerce
Human resources	People, Recruit, Workerly, Shifts
Collaboration	Mail, Cliq, WorkDrive, Writer, Sheet, Show, Meeting, Calendar, Connect, Notebook, Vault
Projects and operations	Projects, Sprints, BugTracker
Analytics and integration	Analytics, DataPrep, Flow, Zia

Note — The exact list of apps changes over time and depends on the edition. Check the launcher or ask your administrator which apps are assigned to you.

3.2 Opening and using an app

1. Click the app in the launcher; it opens with your account, without signing in again.
2. Shared data (customers, employees, products) flows between integrated apps.
3. If an app is not in your launcher, ask your administrator to assign it to you.
4. See the Nuagix manual for each app for detailed usage.

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4. Which apps for which department

4.1 Sales and marketing

Need	Recommended app
Track leads, customers and deals	Zoho CRM
Chat with website visitors	Zoho SalesIQ
Send newsletters and email campaigns	Zoho Campaigns or Marketing Automation
Publish on social media	Zoho Social
Web forms and surveys	Zoho Forms and Zoho Survey
Online appointment booking	Zoho Bookings
E-signature for contracts	Zoho Sign

4.2 Service, finance and HR

Need	Recommended app
Support tickets and knowledge base	Zoho Desk
Remote support	Zoho Assist
Accounting, invoices with GST and QST	Zoho Books
Expense reports	Zoho Expense
Stock and orders	Zoho Inventory
Employee records, leave, attendance	Zoho People
Recruiting	Zoho Recruit

4.3 Collaboration and management

Need	Recommended app
Business email and calendar	Zoho Mail and Calendar
Team chat and calls	Zoho Cliq

Need	Recommended app
File storage and sharing	Zoho WorkDrive
Documents, spreadsheets and presentations	Zoho Writer, Sheet and Show
Video meetings and webinars	Zoho Meeting
Project management and timesheets	Zoho Projects
Executive dashboards	Zoho Analytics
Automate exchanges between apps	Zoho Flow

Nuagix tip — Roll out the apps in stages: start with collaboration (Mail, Cliq, WorkDrive) and the app at the heart of your revenue (CRM or Books), then add the others once the team is comfortable.

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5. Your account and security

5.1 My Account

- Profile: name, photo, language and time zone
- Security: password, multi-factor authentication, app-specific passwords
- Active sessions: view and close sessions open on other devices
- Trusted devices and sign-in history
- Privacy settings and recovery email addresses

5.2 Setting up multi-factor authentication

1. Open My Account > Multi-Factor Authentication.
2. Choose Zoho OneAuth (recommended), an SMS code, a security key or a passkey.
3. Follow the device pairing steps.
4. Generate your recovery codes and keep them in a safe place.

Caution — Never share your password or recovery codes, even with a colleague. Zoho and Nuagix will never ask you for them.

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6. Unified search and dashboards

6.1 Unified search

1. Click the search bar at the top of the launcher or use the keyboard shortcut.
2. Type a customer name, invoice number, email subject or file name.
3. Filter results by app (CRM, Desk, Books, Mail, WorkDrive, etc.).
4. Open the item directly in its app.

Note — Results respect your permissions: you only see data you can access in each app.

6.2 Unified dashboards

- Metrics combining several apps (e.g., CRM sales and Books collections)
- Dashboards prepared by Zoho One and custom dashboards
- Detailed data in Zoho Analytics for advanced needs
- Sharing dashboards with management

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7. Zia, Zoho One's AI

7.1 Zia features

- Plain-language questions about your data (Ask Zia) in CRM, Desk, Analytics and other apps
- Drafting, summarizing and translating emails, documents and tickets
- Predictions and anomaly detection (sales, support, finance)
- Zia Agents that can complete tasks across several apps, depending on configuration
- Contextual search across apps

Note — Zia is built into each app. Available features depend on the edition and the settings enabled by the administrator. Always check generated results.

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8. Automating with Zoho Flow

8.1 What Zoho Flow is for

Zoho Flow connects apps together, Zoho or not, without programming. A flow is triggered by an event in one app (e.g., a new form submitted) and runs actions in others (e.g., create a lead in CRM, post a message in Cliq, add a row in Sheet).

8.2 Creating a simple flow

1. Open Zoho Flow from the launcher > Create Flow.
2. Choose the trigger: app and event (e.g., Zoho Forms > New Entry).
3. Add the actions (e.g., Zoho CRM > Create Lead; Zoho Cliq > Post Message).
4. Map the fields and add conditions or delays if needed.
5. Test the flow, then turn it on.

Nuagix tip — Before creating a flow, check whether a native integration already exists between the two Zoho apps: it is often simpler and more robust.

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9. Everyday collaboration

9.1 Collaboration tools

Tool	Use
Zoho Mail	Business email on your domain, calendar, contacts
Zoho Cliq	Channel or private chat, audio and video calls, bots
Zoho WorkDrive	Team folders, secure sharing, desktop sync
Zoho Writer, Sheet, Show	Co-edited documents, spreadsheets and presentations
Zoho Meeting	Virtual meetings and webinars
Zoho Connect	Intranet: announcements, forums, groups

9.2 Ground rules

- Store team files in WorkDrive Team Folders, not in “My Folders”
- Use Cliq channels for team exchanges and email for external communications
- Share links rather than attachments to avoid multiple versions
- Add a Zoho Meeting or Zoom link to your calendar invitations

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10. Mobile apps

10.1 Features

- Zoho One app: access to apps, notifications, search
- Zoho OneAuth: multi-factor authentication and sign-in management
- Product-specific mobile apps (CRM, Desk, Books, Expense, Cliq, Mail, WorkDrive, etc.)
- Device enrollment in mobile device management (MDM) if your organization requires it
- Zoho One admin app for administrators

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11. Best practices

11.1 Nuagix recommendations

- Turn on multi-factor authentication at your first sign-in
- Use a single reference app per type of data (e.g., customers in CRM, vendors in Books)
- Search before creating to avoid duplicates across apps
- Tell your administrator about any app you no longer need
- Take each app's training before using it in production
- For Quebec customers, work in French and respect their preferred language
- Sign out of your sessions on shared devices

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12. Admin panel

12.1 Accessing the admin panel

1. Sign in to <https://one.zoho.com> (or <https://one.zohocloud.ca>) with an administrator account.
2. Click Admin Panel in the launcher.
3. The dashboard shows sign-ins, app usage, licenses and security alerts.

12.2 Admin panel sections

Section	Content
Dashboard	Sign-ins, app usage, alerts
Directory	Users, groups, departments, organization structure
Applications	App assignment, app administrators, provisioning
Security	Security policies, MFA, SSO/SAML, IP restrictions
Devices	Mobile and computer device management (MDM)
Domains	Verification of the organization's domains
Integrations	Microsoft, Google, directories and third-party apps
Reports / Audit	Audit logs, sign-ins, administrator activity
Subscription	Edition, licenses and billing

Note — The Zoho One admin panel is built on Zoho Directory, Zoho's identity and access management service.

12.3 Administrator types

Role	Powers
Super Admin	All rights, including subscription and management of other administrators
Admin	Management of users, apps and security
Delegated administrator	Manages a specific department or group
App administrator	Configures a given app (e.g., CRM administrator)

Nuagix tip — Appoint at least two super admins, including a break-glass account kept in a safe place, so you never lose access to the admin panel.

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13. Users

13.1 Adding a user

1. Admin Panel > Directory > Users > Add User.
2. Enter the name, email address (on your verified domain), department and manager.
3. Assign the apps their position requires.
4. Add them to the appropriate groups.
5. The user receives an invitation and sets up their password and multi-factor authentication.

Note — For many users, use CSV import or synchronization with Active Directory / Microsoft Entra ID.

13.2 When an employee leaves

1. In each key app (CRM, Desk, Projects, Books), transfer their records and tasks to a colleague.
2. Transfer their WorkDrive files and set up forwarding or retention for their Zoho Mail mailbox.
3. Admin Panel > Users > select the user > Deactivate: their sessions are closed and access is blocked.
4. Remove the device from device management and wipe organization data if needed.
5. Delete the user once data is transferred to free the license.

Caution — Disable access on the day of departure. Deleting a user without first transferring data can result in lost emails, files and records.

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14. Groups, departments and delegation

14.1 Organizing the directory

Element	Use
Department	Organization structure (Sales, Service, Finance, HR); basis for app assignment and delegation
Group	Set of users for sharing, distribution lists and policies
Reporting Manager	Hierarchy used by approvals and by Zoho People
Custom fields	Additional employee information (job title, location, etc.)

14.2 Delegating administration

1. Admin Panel > Directory > Departments > choose the department.
2. Appoint a department administrator.
3. Set their permissions: add users, assign apps, reset passwords.
4. Regularly review delegated administrators' actions in the audit log.

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15. App assignment

15.1 Assigning an app

1. Admin Panel > Applications > choose the app.
2. Click Assign Users and select users, a group or a department.
3. Choose the user's profile or role in the app, if prompted.
4. Appoint the app administrator.
5. Then configure the app itself from its own settings.

15.2 Automatic provisioning

- Assignment rules by department, job title or group (e.g., the whole Sales department gets CRM, SalesIQ and Bookings)
- Automatic assignment when a new employee is added
- Automatic removal when an employee changes department
- Core apps assigned to everyone (Mail, Cliq, WorkDrive)

Nuagix tip — Define an “app bundle” per typical position in a simple table: onboarding a new employee becomes a two-minute task.

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16. Security policies, SSO and MFA

16.1 Security policies

1. Admin Panel > Security > Security Policies > Add Policy.
2. Define the password policy: minimum length, complexity, expiry.
3. Make multi-factor authentication mandatory and choose the allowed methods.
4. Restrict access by IP address or time window if needed.
5. Set session duration and the number of concurrent sessions.
6. Apply the policy to specific groups or departments, starting with administrators.

16.2 Single sign-on (SSO)

Option	Description
SAML 2.0	Sign-in through an external identity provider (Microsoft Entra ID, Okta, Google)
Zoho as identity provider	Sign in to third-party apps with the Zoho One account (hundreds of pre-integrated apps)
Directory sync	Active Directory / Microsoft Entra ID to Zoho One
Passkeys	Passwordless sign-in, depending on configuration

Caution — Before enabling SSO for the whole organization, test it with a pilot group and keep one super admin excluded from SSO so you do not lock yourself out.

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17. Devices and domains

17.1 Mobile device management (MDM)

- Enrollment of company-owned or employee-owned (BYOD) phones, tablets and computers
- Policies: lock code, encryption, restrictions
- Deployment of Zoho apps to devices
- Remote wipe of organization data in case of loss or departure
- Device inventory and compliance status

17.2 Domains

1. Admin Panel > Domains > Add Domain.
2. Add the TXT or CNAME record provided at your registrar to verify ownership.
3. Configure MX, SPF, DKIM and DMARC records for Zoho Mail.
4. Associate new users with the verified domain.

Note — Properly configured SPF, DKIM and DMARC records are essential to the deliverability of your emails and campaigns.

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18. Integrations and Marketplace

18.1 Unified integrations

Integration	Use
Integrations between Zoho apps	Enabled from the admin panel or within each app (e.g., CRM–Books–Desk)
Microsoft 365 / Entra ID	User sync, SSO, calendar and files
Google Workspace	User sync, calendar, Drive
Zoho Flow	Automations between Zoho and third-party apps
Zoho Marketplace	Ready-to-install extensions for each app
REST API (OAuth 2.0)	Custom integrations with your systems

18.2 Integration best practices

- Establish a master app for each type of data (customers, products, employees)
- Document every integration: apps, sync direction, owner
- Use a dedicated service account for critical connections
- Monitor Zoho Flow and integration error logs

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19. Audit and compliance

19.1 Logs and reports

- Administrator audit log: who changed what in the admin panel
- Sign-in reports: successes, failures, unusual locations
- App usage and license reports
- Security alerts and active sessions
- Hosting in the Canadian data center (zohocloud.ca)

19.2 Privacy and Quebec Law 25

- Appoint the person in charge of the protection of personal information and document which apps hold such information
- Restrict access to sensitive data (HR, payroll, finance) to authorized groups
- Configure data retention and deletion in each app
- Promptly deactivate accounts of departing employees
- Keep audit logs to demonstrate the controls in place

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

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20. Editions and billing

20.1 Editions and licensing models

Option	Description
Essentials	A selection of core apps to begin your digital transformation
Standard	The full suite of 50+ apps, device management and advanced features
All Employee	License for all salaried employees of the organization; lower cost per employee
Flexible User	License only for selected users; higher cost per user

Note — Terms and prices change: see the Zoho One pricing page or ask Nuagix for a quote tailored to your organization.

20.2 Managing the subscription

1. Admin Panel > Subscription.
2. Review the edition, licensing model, number of licenses and renewal date.
3. Add or remove licenses as people join and leave.
4. Buy credits or add-ons (storage, AI credits, etc.) as needed.
5. Download invoices for accounting.

Nuagix tip — With the All Employee model, review your number of salaried employees every quarter to stay compliant with the licensing terms.

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21. Deployment checklist

21.1 Before going live

- ☐ Data center chosen (Canadian: zohocloud.ca) and organization created
- ☐ Domain verified and MX, SPF, DKIM, DMARC records configured
- ☐ At least two super admins appointed
- ☐ Departments, groups and managers defined
- ☐ Users imported or synchronized
- ☐ App bundles per position and assignment rules set
- ☐ Security policies and mandatory MFA applied
- ☐ SSO tested with a pilot group, if applicable
- ☐ Device management configured, if applicable
- ☐ Integrations between apps enabled and documented
- ☐ Privacy settings (Law 25) verified
- ☐ Users trained and documentation delivered

Nuagix tip — Nuagix can support your team with Zoho One setup, 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
Admin Panel	Console d'administration
App Launcher	Lanceur d'applications
Directory	Répertoire
User	Utilisateur
Group	Groupe
Department	Département
Reporting Manager	Gestionnaire
Super Admin	Super administrateur
Assign Apps	Attribuer des applications
Security Policy	Politique de sécurité
Multi-Factor Authentication (MFA)	Authentification multifacteur
Single Sign-On (SSO)	Authentification unique
Mobile Device Management (MDM)	Gestion des appareils
Domain	Domaine
Audit Log	Journal d'audit
Personal Space	Espace personnel
Unified Search	Recherche unifiée
Flow	Flux
All Employee	Tous les employés
Flexible User	Utilisateurs flexibles
Subscription	Abonnement

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