



IT technicians · Zoho One optimization



Zoho Sheet

User and Administrator Manual

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Index — English version

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1. Introduction and access

1.1 About this manual

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

Available features vary by plan (Zoho Workplace, Zoho WorkDrive, Zoho One) and by your organization's configuration.

1.2 What is Zoho Sheet?

Zoho Sheet is Zoho's online spreadsheet. It lets you create spreadsheets, calculate with more than 350 functions, analyze data with pivot tables and charts, and collaborate in real time. Zia, Zoho's AI assistant, helps you interpret and clean your data. Zoho Sheet opens and saves Excel files, making it easy to exchange with customers and partners.

1.3 Signing in

1. Go to <https://sheet.zoho.com> (or <https://sheet.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 or Zoho Workplace, open the app launcher and select Sheet, or create a spreadsheet directly from Zoho WorkDrive.
4. Complete multi-factor authentication with Zoho OneAuth if required.

Nuagix tip — In an organization, create your spreadsheets in a WorkDrive Team Folder rather than in My Folders: they remain available to the team if an employee leaves.

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2. Interface and navigation

2.1 Interface elements

Element	Purpose
Menu bar and ribbon	File, Home, Insert, Formulas, Data, Review, View and Automate, depending on the version
Formula bar	Enter or edit the content and formula of the active cell
Grid	Cells organized in rows (numbers) and columns (letters)
Sheet tabs	Bottom of the screen: add, rename, color, hide or move sheets
Status bar	Sum, average and count of selected cells; zoom
Share button	Invite collaborators and manage links
Zia	Analysis suggestions, natural-language questions and data cleaning

2.2 Useful shortcuts

- Ctrl + Z / Ctrl + Y: undo / redo (Cmd on Mac)
- Ctrl + arrow: jump to the end of a data range
- F2: edit the active cell
- Ctrl + Shift + L: turn filters on or off
- Ctrl + /: show the list of keyboard shortcuts

Note — Most common Excel shortcuts work in Zoho Sheet.

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3. Spreadsheets and sheets

3.1 Creating a spreadsheet

1. From Zoho Sheet or WorkDrive, click New > Spreadsheet.
2. Choose a blank spreadsheet or a template (budget, invoice, timesheet, inventory).
3. Rename the spreadsheet by clicking its title at the top left.
4. The spreadsheet is saved automatically with every change.

3.2 Managing sheets

- Add a sheet with the + button next to the tabs
- Right-click a tab: rename, duplicate, move, hide, color or delete
- Freeze rows or columns: View > Freeze
- Group rows or columns to hide details
- Named ranges to make formulas easier to read

3.3 Tables

1. Select a data range with a header row.
2. Insert > Table.
3. Choose a style; the table expands automatically when you add rows.
4. Use structured references and the totals row in your formulas.

Nuagix tip — Format your raw data as a table: charts, pivot tables and filters automatically include new rows.

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4. Formulas and functions

4.1 Entering a formula

1. Select a cell and type = followed by the function name (e.g., =SUM(B2:B20)).
2. Zoho Sheet suggests matching functions and shows the expected syntax.
3. Click the cells or ranges to include, then press Enter.
4. Use \$ to lock a reference (e.g., \$B\$1) before copying the formula.

Note — Depending on the interface language, function names may appear in English (SUM, IF, VLOOKUP). Imported Excel files keep their formulas.

4.2 Common functions

Function	Purpose
SUM, AVERAGE, COUNT	Sum, average and count of values
IF, IFS, AND, OR	Conditional calculations
SUMIFS, COUNTIFS	Totals and counts based on criteria
VLOOKUP, XLOOKUP, INDEX/MATCH	Look up a value in a table
TEXT, CONCAT, TRIM	Work with text
TODAY, EOMONTH, NETWORKDAYS	Dates and business days
FILTER, SORT, UNIQUE	Dynamic array functions

4.3 Calculating taxes

For an invoice or quote, calculate GST (5%) and QST (9.975%) on the subtotal in separate cells, then the total in CAD. Put the rates in named cells (e.g., GST, QST): a single update is enough if a rate changes.

Nuagix tip — For official invoicing, use Zoho Books or Zoho Invoice rather than a spreadsheet: numbering, taxes and filings are handled automatically.

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5. Formatting

5.1 Cell formatting

- Font, color, borders, alignment and text wrapping
- Number formats: currency (CAD), percentage, date, time, accounting, custom
- Merge cells and auto-fit column width
- Copy formatting with the format painter
- Themes and cell styles for a consistent spreadsheet

5.2 Conditional formatting

1. Select the range to highlight.
2. Home > Conditional Formatting.
3. Choose a rule: cell value, text contains, date, duplicates, or custom formula.
4. Set the style, or choose a color scale, data bars or an icon set.
5. Manage rule order and scope in the management panel.

Nuagix tip — A simple rule such as “due date < TODAY() in red” makes a receivables or project tracker readable at a glance.

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6. Data: sorting, filters and validation

6.1 Sorting and filtering

- Data > Sort: on one or more columns, ascending or descending
- Filter: by value, by color, by condition on text, numbers or dates
- Filter Views: each collaborator filters without changing what others see
- Remove duplicates from a range
- Split a text column into several columns (Text to Columns)

6.2 Data validation

1. Select the cells to control.
2. Data > Data Validation.
3. Choose the criterion: picklist, number within a range, date, text length or formula.
4. Add a help message and choose to warn about or reject invalid values.

6.3 Picklists and checkboxes

- Picklists: color-coded drop-down menus for statuses (e.g., To Do, In Progress, Done)
- Checkboxes: TRUE/FALSE values usable in formulas
- Buttons: run a macro or function in one click

Caution — Validation does not prevent invalid data from being pasted in every case. Regularly check cells flagged as invalid.

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7. Pivot tables and charts

7.1 Creating a pivot table

1. Select your data (with headers).
2. Insert > Pivot Table; choose a new sheet.
3. Drag fields into Rows, Columns, Values and Filters.
4. Choose the summary: sum, count, average, maximum, etc.
5. Refresh the pivot table after the source data changes.

7.2 Charts

- Insert > Chart: column, bar, line, pie, area, scatter, combo
- Zia recommends the charts best suited to the selection
- Customize titles, axes, legends, labels and colors
- Mini charts (sparklines) inside a cell
- Dynamic charts updated with the data

Nuagix tip — Create a “Dashboard” tab that gathers charts and key figures, and keep raw data in separate sheets.

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8. Collaboration, versions and protection

8.1 Sharing a spreadsheet

1. Click Share.
2. Enter the addresses of colleagues, a group or a team.
3. Choose the permission: read only, comment, read/write, or co-owner.
4. Add a message and send; or create a share link according to organization policies.

8.2 Working together

- Real-time editing: each collaborator is identified by a cursor color
- Comments on a cell, with @mentions and thread resolution
- Built-in chat with collaborators who are present
- Cell History / Audit Trail: who changed what and when
- Notifications when a watched range changes

8.3 Version history

1. File > Version History.
2. Browse automatically saved versions and compare them.
3. Name an important version (e.g., "Approved Budget 2026").
4. Restore an earlier version or save it as a new spreadsheet.

8.4 Protecting cells and sheets

- Lock a range or an entire sheet: Review > Lock
- Allow only certain collaborators to edit locked areas
- Hide sensitive formulas
- Restrict download, printing and copying for viewers, depending on policies

Caution — Locking protects against mistakes, not against a file owner. Do not keep sensitive personal information in a widely shared spreadsheet.

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9. Forms and data import

9.1 Collecting data with a form

1. Insert > Form, or Data > Form depending on the version.
2. Add fields; each one matches a column in the responses sheet.
3. Share the form link or embed it on your website.
4. Responses are automatically added as rows in the sheet.

Note — For advanced forms (conditional logic, payments, signatures), use Zoho Forms, which can send its responses to Zoho Sheet.

9.2 Importing data

Source	Method
Excel, ODS, CSV, TSV file	File > Import: new spreadsheet, new sheet or replace
Web page, CSV, RSS or JSON feed	Data > External Data: linked with scheduled refresh
Zoho apps (CRM, Books, etc.)	Data connectors, depending on edition and your permissions
Another Zoho Sheet spreadsheet	Functions linking spreadsheets
Database or API	Deluge custom functions or Zoho Flow

9.3 Excel compatibility

- Open and save in XLSX, XLS, ODS, CSV, TSV; export to PDF and HTML
- Formulas, formats, pivot tables and common charts are preserved
- VBA macro support, with some limitations
- Check the layout after importing complex files (external links, add-ins)

Nuagix tip — For an Excel file received from a customer, import a copy into Zoho Sheet, work on it, then export as XLSX when sending it back.

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10. Zia, the AI assistant

10.1 Zia features

- Zia Insights: analysis of the selection and pivot table and chart suggestions
- Natural-language questions (“What are total sales by region?”)
- Data Cleaning: duplicates, inconsistent values, empty cells, differing date or unit formats
- Formula suggestions and explanation of an existing formula
- Auto-fill based on a detected pattern
- Header and data type detection

10.2 Cleaning a data set

1. Select the range to analyze.
2. Data > Data Cleaning, or open Zia.
3. Review the detected issues: duplicates, spelling variants (“Montréal”, “Montreal”), missing values.
4. Accept or reject each proposed correction, then apply.

Note — Always review Zia's proposed corrections before applying them, especially on financial data.

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11. Macros and automation

11.1 Recording a macro

1. Automate > Macros > Record Macro.
2. Perform the actions to repeat (formatting, sorting, copying).
3. Stop recording and name the macro.
4. Run it from the Macros menu or assign it to a button.

Caution — A macro can change a lot of data at once. Test it on a copy of the spreadsheet.

11.2 Other automation options

Tool	Use
VBA macros	Edit or import existing VBA macros
Custom functions (Deluge)	Build your own calculation functions or calls to other apps
Automations	Send an email or notification when a condition is met
Zoho Flow	Connect Sheet to other Zoho or third-party apps without coding

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12. Mobile app

12.1 Features

- Create, view and edit spreadsheets on iOS and Android
- Work offline and sync when the connection returns
- Enter data with mobile-friendly forms
- Scan a printed table to convert it into data (depending on the version)
- Comment and reply to mentions
- Share a spreadsheet or export it to PDF

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13. Best practices

13.1 Nuagix recommendations

- Separate raw data, calculations and dashboards into different sheets
- Use tables and named ranges rather than hard-coded references
- Add validation to manually entered columns to prevent errors
- Name important versions before a major change
- Share with groups rather than individuals, and review access every quarter
- Do not turn a spreadsheet into a management system: for sales, invoicing or projects, use Zoho CRM, Books or Projects
- For documents intended for Quebec customers, use French (Canada) date and number formats

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Part 2 — Administrator Guide

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14. Users and roles

14.1 Where to administer Zoho Sheet

Element	Controls
Zoho Workplace Admin Console	Users, groups, office suite app policies (Writer, Sheet, Show)
Zoho One console	Users, app assignment, security and global policies
WorkDrive Admin Console	Team Folders, sharing, storage and audit log for Sheet files
Super administrator	Full access to the organization, billing and policies
Administrator	Manages users, groups and policies, according to granted rights

14.2 Adding a user

1. Admin Console > Users > Add.
2. Enter the name and email address, then assign the role (user or administrator).
3. Add them to the appropriate groups and WorkDrive Team Folders.
4. The user receives an invitation and can access Zoho Sheet once active.

Note — In Zoho One, first add the user in the Zoho One console and assign them the Workplace or WorkDrive apps.

14.3 When an employee leaves

1. Transfer their files (My Folders) to another user from the Admin Console.
2. Check the spreadsheets they owned in Team Folders and change the owner as needed.
3. Disable public links and automations they created (macros, functions, Zoho Flow).
4. Deactivate or delete the user to free the license.

Caution — Deleting a user without transferring their files can permanently lose their personal spreadsheets.

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15. Organization settings

15.1 Default settings

- Language, time zone and regional settings (French (Canada) formats, CAD currency)
- Organization spreadsheet templates (budget, report, timesheet)
- Brand fonts and themes
- Default location for new files (WorkDrive Team Folder)

15.2 Organization templates

1. Create a template spreadsheet with the desired formatting, formulas and validation.
2. Publish it to the organization's template gallery (depending on edition).
3. Ask users to create new files from the template.
4. Update the template as needed; existing spreadsheets are not changed.

Nuagix tip — A quote or timesheet template with built-in GST, QST and validation prevents many data-entry errors.

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16. Sharing policies

16.1 Available controls

Policy	Effect
External sharing	Allow, restrict to certain domains or block sharing outside the organization
Public links	Allow or block links accessible without signing in
Publishing and embedding	Allow or block publishing a spreadsheet on the web
Download and print	Restrict export for external collaborators
Expiry and password	Require an expiry date or password on links

Nuagix tip — Start by blocking public links and allowing external sharing only to your partners' domains: it is safer than the reverse.

16.2 Applying a policy

1. Open the Admin Console (Workplace, WorkDrive or Zoho One).
2. Go to the app sharing policies (Office Suite or WorkDrive).
3. Set restrictions for the whole organization or for specific groups.
4. Inform users of the rules and the procedure to request an exception.

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17. Automation and development

17.1 Tools for administrators

Tool	Use
Deluge custom functions	Business calculations and Zoho API calls from a cell
Shared macros	Standardize repetitive processing in template spreadsheets
Zoho Flow	Add a row in Sheet on an event (new sale, new form entry)
Zoho Sheet API	Create, read and update spreadsheets from another application (OAuth 2.0)
Webhooks and Deluge in other apps	Write to Sheet from Zoho CRM, Books or Desk

17.2 Governing automation

- Use a service or team account for long-lived API connections
- Document every automation: purpose, trigger, target spreadsheet, owner
- Limit connection rights to what is strictly needed
- Review scheduled jobs after every employee departure

Nuagix tip — Keep an automation register in a shared spreadsheet: it is essential for maintaining your tools.

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18. Integrations

18.1 Zoho integrations

Application	Typical use
Zoho WorkDrive	Storage, sharing and Team Folders for spreadsheets
Zoho CRM	Export views or import CRM data for analysis
Zoho Forms	Send form responses to a spreadsheet
Zoho Analytics	Use a spreadsheet as a source for advanced reports
Zoho Cliq	Share a spreadsheet and receive notifications
Zoho Mail	Attach Excel files or open attachments in Sheet
Zoho Books / Projects	Export data for one-off analyses

18.2 Other integrations

- Microsoft Excel: XLSX import and export
- Google Drive, Dropbox, Box and OneDrive: file import
- Zoho Flow: more than a thousand third-party apps
- Zoho Sheet REST API (OAuth 2.0) and external data feeds

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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
- External sharing, download and print policies
- WorkDrive audit log and cell history in each spreadsheet
- Encryption of data at rest and in transit
- Hosting in the Canadian data center (zohocloud.ca)

19.2 Privacy and Quebec Law 25

- Inventory spreadsheets that contain personal information
- Store them in restricted-access Team Folders
- Block public links on those folders
- Set a retention period and delete lists that are no longer needed
- Record access, correction and deletion requests

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

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20. Editions and licenses

20.1 Offerings

Offering	For whom
Zoho Sheet (personal account)	Individual use, without organization administration
Zoho Workplace	Teams: Mail, WorkDrive, Writer, Sheet, Show, Cliq and central administration
Zoho WorkDrive	Teams focused on storage and document collaboration
Zoho One	Sheet included with the full set of Zoho apps

20.2 Tracking usage

The Admin Console shows the plan, licenses used and storage. Capacities (spreadsheet size, number of cells, Zia features, macros) vary by edition. Remove licenses from deactivated users.

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21. Deployment checklist

21.1 Before going live

- ☐ Organization, language, time zone and regional formats (CAD) configured
- ☐ Users added and groups created
- ☐ WorkDrive Team Folders created for shared spreadsheets
- ☐ External sharing and public link policies defined
- ☐ Organization templates published
- ☐ Existing Excel files imported and checked
- ☐ Macros and custom functions tested
- ☐ Integrations (CRM, Forms, Analytics, Flow) configured
- ☐ Multi-factor authentication enabled
- ☐ Spreadsheets containing personal information inventoried (Law 25)
- ☐ Users trained and documentation delivered

Nuagix tip — Nuagix can support your team with Zoho Sheet 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
Spreadsheet / Workbook	Classeur
Sheet	Feuille
Cell	Cellule
Range	Plage
Named Range	Plage nommée
Formula Bar	Barre de formule
Conditional Formatting	Mise en forme conditionnelle
Data Validation	Validation des données
Picklist	Liste de choix
Checkbox	Case à cocher
Pivot Table	Tableau croisé dynamique
Chart	Graphique
Filter	Filtre
Filter View	Vue filtrée
Freeze Panes	Figurer les volets
Data Cleaning	Nettoyage des données
Version History	Historique des versions
Lock	Verrouiller
Macro	Macro
Custom Function	Fonction personnalisée

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