



IT technicians · Zoho One optimization



Zoho Writer

User and Administrator Manual

→ [Go to the index](#)

Prepared by Nuagix · September 2026

nuagix.ca · support@nuagix.ca

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

Index — English version

Click any title to jump directly to that section. Each chapter ends with a “Back to index” link.

PART 1 — USER GUIDE

1. Introduction and access

- 1.1 About this manual
- 1.2 What is Zoho Writer?
- 1.3 Signing in

2. Interface and navigation

- 2.1 Interface elements
- 2.2 Display modes

3. Creating documents and using templates

- 3.1 Creating a document
- 3.2 Using a template
- 3.3 Importing an existing document

4. Formatting and styles

- 4.1 Styles
- 4.2 Layout elements
- 4.3 Language and proofing

5. Real-time collaboration

- 5.1 Sharing a document
- 5.2 Co-editing
- 5.3 Comments

6. Track changes and versions

- 6.1 Track Changes
- 6.2 Version history
- 6.3 Finalizing a document

7. Mail merge

- 7.1 How it works
- 7.2 Data sources
- 7.3 Creating a merge template
- 7.4 Merging from Zoho CRM

8. Fillable forms

- 8.1 Creating a fillable document

9. Electronic signature

- 9.1 Sending for signature
- 9.2 Signature and automation

10. Zia, the writing assistant

- 10.1 Zia features

11. Export, print and publishing

- 11.1 Export formats
- 11.2 Printing and publishing

12. Mobile and desktop apps

12.1 Features

13. Best practices

13.1 Nuagix recommendations

PART 2 — ADMINISTRATOR GUIDE

14. Users and roles

14.1 Where to administer Writer

14.2 Roles

14.3 Adding a user

14.4 When an employee leaves

15. Sharing policies

15.1 Sharing settings

16. Templates, branding and defaults

16.1 Organization templates

16.2 Default settings

17. Document automation

17.1 Automation tools

17.2 Automating a contract from the CRM

18. Integrations

18.1 Zoho integrations

18.2 Other integrations

19. Security and compliance

19.1 Security controls

19.2 Privacy and Quebec Law 25

20. Editions and licenses

20.1 Offerings

20.2 Tracking usage

21. Deployment checklist

21.1 Before going live

APPENDIX

A. English-French glossary

A.1 Interface terms

Part 1 — User Guide

1. Introduction and access
2. Interface and navigation
3. Creating documents and using templates
4. Formatting and styles
5. Real-time collaboration
6. Track changes and versions
7. Mail merge
8. Fillable forms
9. Electronic signature
10. Zia, the writing assistant
11. Export, print and publishing
12. Mobile and desktop apps
13. Best practices

[↑ Back to index](#)

1. Introduction and access

1.1 About this manual

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

Zoho Writer is available on its own and included in Zoho Workplace, Zoho WorkDrive and Zoho One. Some features (high-volume mail merge, automation, signature) vary by edition.

1.2 What is Zoho Writer?

Zoho Writer is Zoho's online word processor. It lets you write and format documents, co-edit them in real time, review them with comments and track changes, then automate their production: mail merge from Zoho CRM or Zoho Sheet, fillable forms and electronic signature. It is fully compatible with Microsoft Word (DOCX) and PDF.

1.3 Signing in

1. Go to <https://writer.zoho.com> (or <https://writer.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 Writer, or create a document from Zoho WorkDrive.
4. Complete multi-factor authentication with Zoho OneAuth if required.

Nuagix tip — Install the Zoho Writer desktop app (Windows, macOS, Linux) to work offline; your changes sync when you are back online.

[↑ Back to index](#)

2. Interface and navigation

2.1 Interface elements

Element	Purpose
Home / My Documents	Recent documents, shared with you, favourites and folders
Formatting toolbar	Styles, fonts, paragraphs, lists, insert
Side panel	Insert, Layout, Review, Automate tabs, depending on context
File menu	New, templates, export, print, version history
Review	Comments, track changes, document comparison
Automate	Mail merge, fillable forms, signature
Zia	Writing assistant: grammar, style, readability, AI drafting

2.2 Display modes

- Page View: print-accurate preview
- Web View: continuous reading without page breaks
- Focus Mode: uncluttered screen for writing
- Night Mode: dark colours
- Read mode and presentation mode for review

[↑ Back to index](#)

3. Creating documents and using templates

3.1 Creating a document

1. Click New Document, or in WorkDrive: New > Document.
2. Name the document (edit the name at the top left).
3. Write: saving is automatic.
4. Store the document in a WorkDrive Team Folder to share it with your colleagues.

3.2 Using a template

1. File > New from Template, or Template Gallery.
2. Choose a Zoho template (letter, service proposal, minutes, résumé, report) or one of your organization's templates.
3. Replace the sample content with your own.
4. Save a document as a template with File > Save as Template.

Nuagix tip — Create organization templates for your recurring documents (quote, service agreement, job offer letter) with your logo, contact details and GST and QST numbers: every employee starts from a compliant base.

3.3 Importing an existing document

- Import Word (DOC, DOCX), ODT, RTF, TXT, HTML and Markdown files
- Open PDFs for conversion into an editable document, depending on layout
- Import from WorkDrive, Google Drive, OneDrive, Dropbox or Box
- Word formatting and comments preserved in most cases

[↑ Back to index](#)

4. Formatting and styles

4.1 Styles

1. Select a paragraph and apply a style: Heading 1, Heading 2, Normal, Quote, etc.
2. To edit a style, right-click the style > Modify, then adjust font, size, colour and spacing.
3. Use Update to Match Selection to apply formatting throughout the document.
4. Save your styles as a theme to reuse them in other documents.

Nuagix tip — Always use heading styles rather than manual bold: the table of contents, navigation outline and PDF export with bookmarks depend on them.

4.2 Layout elements

Element	Use
Header / Footer	Logo, page number, confidentiality notice
Table of Contents	Generated from heading styles
Sections and page breaks	Different orientation, margins and headers per section
Tables	Formatting, merged cells, simple formulas
Images, shapes and charts	Insertion and text wrapping
Footnotes and citations	References and bibliography (APA, MLA, Chicago)
Fields	Date, page number, page count, document properties

4.3 Language and proofing

- Set the document language (French — Canada or English — Canada) for appropriate spell-checking
- Zia grammar checker in French and English
- Translation of the document or a passage into 40+ languages
- Statistics: word count, reading time, readability

[↑ Back to index](#)

5. Real-time collaboration

5.1 Sharing a document

1. Click Share at the top right.
2. Enter colleagues' email addresses or a group.
3. Choose the permission: View, Comment, Edit or Co-own.
4. For external people, create an external share link with a password and expiry date if needed, if your administrator allows it.
5. Send the invitation with a message.

5.2 Co-editing

- Several people edit the document at the same time; each cursor is identified by a name and colour
- Built-in chat with co-editors
- Content locking on a section to prevent changes
- @mentions to get a colleague's attention
- Notifications of changes and replies

5.3 Comments

1. Select text and click Add Comment.
2. Write your comment and @mention a person to assign it.
3. Reply in the discussion thread.
4. Click Resolve when the point is settled; resolved comments remain viewable.

[↑ Back to index](#)

6. Track changes and versions

6.1 Track Changes

1. Review > Track Changes > Turn on.
2. All insertions and deletions are shown with the author's name.
3. Move from one change to the next and click Accept or Reject.
4. Use Accept All or Reject All to finalize.
5. Change the display (with markup, without markup, original) for review.

Nuagix tip — When negotiating a contract with a customer, turn on track changes and share in comment or tracked-edit mode: you keep a record of every requested change.

6.2 Version history

- File > Version History: all automatically saved versions
- Name an important version (e.g., “Version sent to customer on September 15”)
- Compare two versions to see the differences
- Restore an earlier version or make a copy of it
- Compare two separate documents (Compare Documents)

6.3 Finalizing a document

- Mark as Final: the document becomes read-only
- Review and approval process with designated reviewers, depending on edition
- Watermark (e.g., “Draft”, “Confidential”)
- Password protection when exporting to PDF

[↑ Back to index](#)

7. Mail merge

7.1 How it works

Mail Merge creates several personalized documents from a template and a data source: letters, contracts, certificates, invoices, labels. Merge fields (e.g., Name, Address, Amount) are replaced with each record's data.

7.2 Data sources

Source	Examples of use
Zoho CRM	Letters to contacts, contracts from a deal, personalized quotes
Zoho Sheet / Excel / CSV	Guest lists, training certificates, labels
Zoho Forms	Document generated on each form submission
Zoho Recruit, Desk, Bigin, Books	Offer letters, replies, customer documents
Third-party apps and API	Salesforce, Google Sheets, webhooks, depending on configuration

7.3 Creating a merge template

1. Create a document, then Automate > Mail Merge > Choose Data Source.
2. Connect the source (e.g., Zoho CRM > Contacts module).
3. Insert merge fields into the text with Insert Field.
4. Add conditions (If... then) for variable content, for example a clause depending on the province.
5. Preview with real records.
6. Merge and choose the output: separate documents, a single document, PDF, email delivery or send for signature.

Nuagix tip — Format amounts in CAD and dates in the Quebec format (e.g., 18 septembre 2026 for French documents) directly in the merge field options.

7.4 Merging from Zoho CRM

- Mail merge button on the CRM record or list view
- Subform merge (e.g., a quote's product lines) as a table
- Automatic saving of the document on the CRM record
- Triggered by a CRM workflow (e.g., generate the contract when the deal moves to Closed Won)

[↑ Back to index](#)

8. Fillable forms

8.1 Creating a fillable document

1. Automate > Fillable Form.
2. Insert fields: text, number, date, checkbox, drop-down, signature.
3. Make fields mandatory and add validations as needed.
4. Publish the document and share the link with respondents.
5. View each response as a filled document; export data to Zoho Sheet if needed.

Note — For complex web forms (advanced conditional logic, payments, multiple integrations), use Zoho Forms instead and generate the final document with Writer mail merge.

[↑ Back to index](#)

9. Electronic signature

9.1 Sending for signature

1. Open the final document > Automate > Sign.
2. Add the signers (name, email) and the signing order.
3. Place signature, initials and date fields for each signer.
4. Add a message and an expiry date, then send.
5. Track the status; the signed document and completion certificate are saved automatically.

9.2 Signature and automation

- Signature is powered by Zoho Sign (audit trail, certificate, timestamp)
- Bulk send for signature after a mail merge (e.g., annual agreements)
- Automatic filing of signed documents in WorkDrive or on the CRM record
- In-person signing on a tablet, depending on configuration

Note — Signature sending limits depend on the edition. For high volumes or complex approval flows, a Zoho Sign subscription may be required.

[↑ Back to index](#)

10. Zia, the writing assistant

10.1 Zia features

- Grammar, spelling and punctuation checks
- Style suggestions: conciseness, tone, active voice, readability
- Generative AI drafting, rewording, summarizing and extending text
- Plagiarism detection, depending on edition
- Translation and content creation from predefined prompts

Note — Zia can make mistakes, especially with legal and technical terms. Always review generated text and do not enter confidential information in a prompt if your policy forbids it.

[↑ Back to index](#)

11. Export, print and publishing

11.1 Export formats

Format	Use
Word (DOCX)	Sending to a recipient who works in Microsoft Word
PDF	Final version, with password and bookmark options
ODT, RTF, TXT, HTML, Markdown, EPUB	Other uses and publishing
Zoho Show / WordPress	Publishing to a presentation or blog

11.2 Printing and publishing

- File > Print, with preview and page selection
- Publishing as a public link or embedding in a website, if allowed
- Saving directly to WorkDrive, in a Team Folder
- Sending by email as an attachment from Writer

[↑ Back to index](#)

12. Mobile and desktop apps

12.1 Features

- iPhone, iPad and Android apps: view, write and comment
- Windows, macOS and Linux desktop app with offline work
- Voice dictation and document scanning
- Signing a document on a phone or tablet screen
- Automatic sync with WorkDrive

[↑ Back to index](#)

13. Best practices

13.1 Nuagix recommendations

- Store documents in WorkDrive Team Folders rather than in your personal folders
- Use styles and organization templates for a consistent image
- Share links rather than attachments to avoid multiple versions
- Name important versions before sending them to a customer
- Automate repetitive documents with mail merge from the CRM
- Set the document language to French — Canada for Quebec customers' documents
- Export documents sent outside the organization to PDF

[↑ Back to index](#)

Part 2 — Administrator Guide

- 14. Users and roles
- 15. Sharing policies
- 16. Templates, branding and defaults
- 17. Document automation
- 18. Integrations
- 19. Security and compliance
- 20. Editions and licenses
- 21. Deployment checklist

[↑ Back to index](#)

14. Users and roles

14.1 Where to administer Writer

Context	Console
Zoho Workplace	Workplace admin console (users, policies, apps)
Zoho WorkDrive	WorkDrive admin console (Team Folders, sharing, storage)
Zoho One	Zoho One console: assignment of Writer, WorkDrive and other apps
Writer standalone	Organization settings in Writer

14.2 Roles

Role	Permissions
Super Admin / Admin	Users, sharing policies, security settings, organization templates
Team Folder admin	Members and permissions of a WorkDrive Team Folder
Member	Creates, edits and shares according to organization policies
Guest / external	Limited access to documents shared with them

14.3 Adding a user

1. Admin console > Users > Add User.
2. Enter the name and email address.
3. Assign the role and license (Workplace, WorkDrive or Zoho One).
4. Add the user to the relevant Team Folders.
5. The user receives an email invitation.

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

14.4 When an employee leaves

1. Transfer ownership of their documents and templates to a colleague or a Team Folder.
2. Reassign their mail merge templates and automations that use their account.
3. Revoke their external share links.
4. Deactivate the user, then remove them to free the license.

Caution — Documents stored in a deleted employee's "My Folders" can be lost if they were not transferred. Always transfer before deleting.

[↑ Back to index](#)

15. Sharing policies

15.1 Sharing settings

- Allow or block external sharing (outside the organization)
- Public links and embedding: allowed, limited or disabled
- Mandatory password and expiry date for external links
- Restriction of download, print and copy for viewers
- Allowed external domains (e.g., known customers and partners)

Nuagix tip — Disable public links by default and allow external sharing only with a password and expiry: it is the safest balance for an SMB.

[↑ Back to index](#)

16. Templates, branding and defaults

16.1 Organization templates

1. Prepare the template (logo, styles, header, footer, legal notices).
2. File > Save as Template > Organization Templates.
3. Classify templates by category (Sales, HR, Legal, Administration).
4. Restrict template editing to administrators or designated owners.

16.2 Default settings

- Organization fonts and uploaded custom fonts
- Page size (US Letter, standard in Canada) and margins
- Default language: French — Canada or English — Canada
- Zia options enabled or disabled for the organization
- Default save location in WorkDrive

Note — Letter size (8.5 × 11 in) is the standard in Quebec; check it in templates imported from Europe, which are often A4.

[↑ Back to index](#)

17. Document automation

17.1 Automation tools

Tool	Use
Merge Templates	Generating documents from a data source
Zoho CRM workflows	Generate and send a document on a CRM event
Zoho Flow	Connect Writer to other apps without programming
Deluge functions	Custom logic from Zoho apps
Writer API (OAuth 2.0)	Merge, conversion and signature programmatically
Webhooks	Receive merge data from an external system

17.2 Automating a contract from the CRM

1. Create the contract template in Writer with merge fields from the Deals module.
2. Configure the output: PDF, send for signature to the primary contact.
3. In Zoho CRM, create a workflow rule: Stage = Closed Won > mail merge action.
4. Test with a dummy deal and check the document, signature and saving on the record.
5. Document the automation (template, trigger, owner).

Nuagix tip — Have your legal advisor review the template once, then automate: every generated contract will match the approved template.

[↑ Back to index](#)

18. Integrations

18.1 Zoho integrations

Application	Typical use
Zoho WorkDrive	Storage, Team Folders, sharing and versions
Zoho CRM / Bigin	Mail merge and documents linked to records
Zoho Sign	Electronic signature with audit trail
Zoho Sheet	Data source for mail merge
Zoho Forms	Document generation from submissions
Zoho Recruit / People	Offer letters and HR documents
Zoho Cliq and Zoho Mail	Sharing and notifications

18.2 Other integrations

- Microsoft Word: faithful DOCX import and export
- Google Drive, OneDrive, Dropbox, Box
- WordPress for publishing
- Zoho Marketplace: extensions
- REST API and SDKs

[↑ Back to index](#)

19. Security and compliance

19.1 Security controls

- Multi-factor authentication and single sign-on (SAML) via Zoho Accounts / Zoho Directory
- Sharing policies and download restrictions
- Watermarks and password-protected PDFs
- Audit log of access and sharing (WorkDrive / Workplace console)
- Encryption of data in transit and at rest
- Hosting in the Canadian data center (zohocloud.ca)

19.2 Privacy and Quebec Law 25

- Store documents containing personal information in restricted Team Folders
- Limit external sharing of HR and customer documents
- Set a retention period for documents generated by mail merge
- Use merge fields rather than manual copies of personal data
- Keep signature certificates with the contracts

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

[↑ Back to index](#)

20. Editions and licenses

20.1 Offerings

Offering	For whom
Free Writer	Personal use: full word processor, basic collaboration
Zoho WorkDrive	Teams: Writer, Sheet and Show with storage and Team Folders
Zoho Workplace	Organizations: Mail, Cliq, WorkDrive, Writer and other office tools
Zoho One	Writer included with all the suite's apps

Note — Mail merge, automation and signature limits vary by offering and edition. Check them before automating high volumes.

20.2 Tracking usage

The Workplace, WorkDrive or Zoho One admin console shows licenses used, storage and, depending on the offering, merge and signature credits. Remove licenses from users who have left the organization.

[↑ Back to index](#)

21. Deployment checklist

21.1 Before going live

- ☐ Users added and licenses assigned
- ☐ WorkDrive Team Folders created with the right permissions
- ☐ External sharing policies defined
- ☐ Fonts, Letter size and French — Canada language configured
- ☐ Organization templates created and approved
- ☐ Mail merge templates connected to CRM or Sheet and tested
- ☐ Electronic signature configured and tested
- ☐ Automations documented
- ☐ Existing Word documents migrated and checked
- ☐ Zia settings defined according to your policy
- ☐ Security and privacy settings (Law 25) verified
- ☐ Users trained and documentation delivered

Nuagix tip — Nuagix can support your team with Zoho Writer setup, integration and training.
Book a Zoom meeting: <https://nuagix.zohobookings.com/#!/andre-martin>

[↑ Back to index](#)

Appendix

A. English-French glossary

[↑ Back to index](#)

A. English-French glossary

A.1 Interface terms

English (interface)	French
Document	Document
Template	Modèle
Style	Style
Header / Footer	En-tête / pied de page
Table of Contents	Table des matières
Share	Partager
Co-editing	Coédition
Comment	Commentaire
Resolve	Résoudre
Track Changes	Suivi des modifications
Version History	Historique des versions
Mark as Final	Marquer comme final
Mail Merge	Publipostage
Merge Field	Champ de fusion
Data Source	Source de données
Fillable Form	Formulaire remplissable
Signer	Signataire
Automate	Automatiser
Watermark	Filigrane
Team Folder	Dossier d'équipe
Audit Log	Journal d'audit

[↑ Back to index](#)