Zoho CRM User and Security Set up for Administrators

Zoho CRM is easy to set up for basic use, yet it has extensive features capable of supporting the small enterprise. If you plan to go beyond the basics there are a number of options to consider when setting up your Zoho CRM database.

Account Set-up

Company details

Organizational details

Roles, Profiles, Groups, and Data Sharing Rules

Creating Users

Module, Sub-Module, and Field-level Permissions

Apps & Add-ons (what's included in which edition and what's extra)

Subscription Manager

System Requirements

Your guide to setting up Zoho CRM Users

Getting Started

This cheat sheet will help you prepare the information you'll need to proceed, as well as direct you to the right spot in Zoho CRM after you're logged into your account. It also outlines some of the terms and concepts to help you figure out the best options for your organization. If you need more help, you can reach out to a Zoho Alliance Partner (such as On the verge) or request help on the Zoho User Forums.

The first thing to know is that Zoho CRM does not require a minimum or maximum number of users and subscriptions can be upgraded or downgraded at will (all users must be on the same edition).

Step One - Account Set-up:

- Credit card information:
- Cardholder name
- Card Number
- Expiration date
- Security code
- Billing address

[**Setup** through your Zoho Alliance Partner or online with Zoho Corp.]

Create the Account owner record:

- Name
- Address
- Phone(s)
- Email *
- Date of Birth
- Language
- Time zone
- Email Signature

Go to [**Setup** | Personal Settings| Account Information]

Company details (Items in red are required values)

- Company Name
- Address
- Time Zone
- Currency (multiple currencies permitted)
- Fiscal Year (start Month)
- Company Logo (.jpeg, .jpg, .png, or .gif image, 190 x 65 pixels, not to exceed 20 KB)
- Primary Contact (credit card holder)

Go to [**Setup** | Organization Settings| Company Details / Fiscal year / Business Hours / Currencies]

Zoho Security

Step Two – Preparing to create users – what you need to know before you begin

- What are the various user roles and functions within the company (see Roles and Profiles, below)?
- Does all data need to be available across the organization (or limited to roles and functions?)
    - What are the ramifications of the security options?
    - Remember that security must always be balanced with a user's ability to do their work.
- Who else should be a database administrator?
    - You're the administrator by virtue of setting up the account
    - There should be a backup admin.
- Do you have a subscription for everyone who needs (or can benefit from) access to the database? Keep people on the same page - *don't leave out anyone who is customer-facing.*

Roles, Profiles, and Groups

In Zoho CRM, a **Role** defines the function or position of user(s) within the organizational-wide hierarchy. It is used in conjunction with a **Profile**, which provides or restricts access to the CRM data on a per-user or per-Role basis.

Roles are used to classify functional areas such as customer service, sales, marketing, etc. This simplifies assigning permission levels to users who share the same user access requirements to data.

Two Roles are included by default:
- **CEO**
- **Manager**

To Create new Roles: What you'll need to know:

Reports to: [Zoho Role of immediate supervisor]
Share Data with Peers: [Y/N]
Description:

Go To [**Setup** | Users & Permissions| Roles]

A **Profile** defines the set of permissions to access the features in the Zoho CRM.

Profiles control user permissions for Modules, Sub-Modules, Records, and Field Level Security.
- **Module level access:** Enable or disable the access to modules (tabs).
- **Record-level access:** Enable or disable permissions to View, Create, Edit, and Delete records.
- **Sub module-level access:** Enable or disable permission to access sub-modules, such as Import, Export, Mass Mail, Mass Update, Mass Transfer etc., to the users associated to the profiles.

- **Field-level access:** Enable or disable permission to access or edit the fields in a record.
  General permissions:
- **Tab Visibility:** Permission to allow or restrict access to the modules (tabs)
- **View:** Permission to view the records in module
- **Create:** Permission to create the record in module
- **Edit:** Permission to modify the record in module
- **Delete:** Permission to delete the records in module

Two Profiles are provided in Zoho CRM by default:
- **Administrator:** access to all features in the Zoho CRM account.
- **Standard:** limited access to features in Zoho CRM account.

Create Profiles - What you'll need to know – create new profiles to enable customization:

Profile Name:
Share Data with Peers:
Description:

Go To [Setup | Users & Permissions| Roles]

Module-level Permissions:

Entity	Tab Visible	View	Create	Edit	Delete
Home	☑				
Leads	☑	☑	☑	☑	☑
Accounts	☑	☑	☑	☑	☑
Contacts	☑	☑	☑	☑	☑
Potentials	☑	☑	☑	☑	☑
Campaigns	☑	☑	☑	☑	☑

By default, all data entered by a user is private to that user. As administrator, you'll need to modify record access defaults to make data available to the users who should have access to the records.

Default Organization Permissions:

Edit All Default Permissions

	Module	Default Access
Edit	Leads	Public Read/Write/Delete
Edit	Accounts	Public Read/Write/Delete
Edit	Contacts	Public Read/Write/Delete
Edit	Potentials	Public Read Only
Edit	Campaigns	Public Read/Write/Delete

Groups [Enterprise]

You can create different types of **Groups** and share the common records among groups. Groups are effective for setting up team support, such as sharing access between sales and customer service. Data Sharing Rules **[Enterprise]** can be created to seamlessly manage the assignment behind the scenes.

You can manage Groups with the following combinations:
- Users: Add only users.
- Roles: Add all users assigned to a specific Role
- Roles & Subordinates: All users associated with roles and subordinate
- Sub-groups: All users belonging to an existing group can also become members of a new group.

Although records are always owned by the user, access rights can be granted to other users by grouping users and creating sharing rules for each module.

Go To [**Setup** | Users & Permissions| Groups / Data Sharing Settings] {Enterprise}

Data-Sharing Rules {Enterprise}:
Data Sharing Rules let you define rules to share data with peers, management, and subordinates, by Module. You can share data with other Roles, Users, or Groups. You will need to know:
- Records Shared From: [Groups, Roles, or Roles and Subordinates] Group or Role Name
- Records Shared To: [Groups, Roles, or Roles and Subordinates] Group or Role Name
- Access Type: [Read/Write/Delete or Read Only]
- Superiors Allowed: [Yes/No]

Go To [Setup | Users & Permissions| Groups / Data Sharing Settings] {Enterprise}

Zoho CRM Administrator Cheat Sheet | User Set up | Security Roles and Profiles | Planning Apps and Add-ons

Create Users:
A license is required for each user of Zoho CRM. Licenses may be deactivated and subscriptions can be increased or decreased at will.
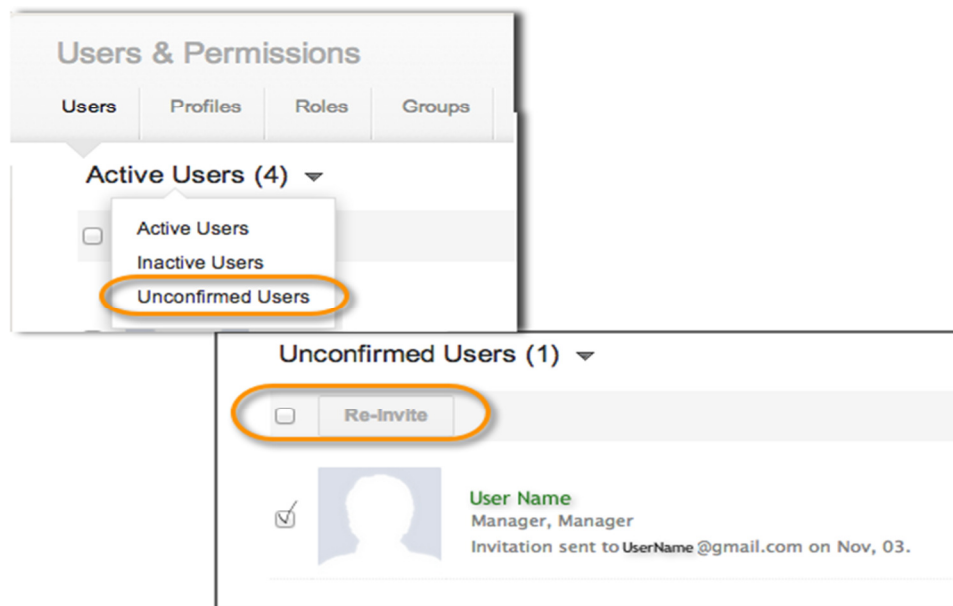
- Name
- Address
- Phone(s)
- Email *
- Time zone
- User Role
- User Profile
- Add-on subscriptions (mobile access, Zoho Campaigns, etc.)

    Go To [**Setup** | Users & Permissions| Users]

Note: An e-mail address can only be associated to one Zoho account. If an email is associated with another account, even a trial, the user must cancel the existing account or use an alternate email.

Users receive an email inviting them to login; they will confirm their account and create their own password at that time. It's a good idea to inform them to expect the email and have them check the spam folder if needed.

If the email is accidentally lost or deleted before the user is confirmed, you can re-invite the user:

1. Click Setup > Users & Permissions > Users.
2. Hover the mouse over a user name and click the Re-Invite link.
3. Alternatively, you can also go to the Unconfirmed Users view and select the user to re-invite. An invitation email will be sent to the user's email address.

Zoho CRM Administrator Cheat Sheet | User Set up | Security Roles and Profiles | Planning Apps and Add-ons

Name Format:

This Page helps you to customize the name format of your Users, Leads and Contacts, where you define the order of Salutation, First Name and Last Name format.

Go to [**Setup** | Personal Settings| Name Format]

Modules

*Module, Sub-Module, and Field-level Permissions: Modules are the backbone of Zoho CRM. They categorize and organize records as Leads, Potentials, Contacts, Account, Activities, and so on.

M**odule-level permissions**
- Tab visibility
- View Records
- Create Records
- Edit Records
- Delete Records

Sub module-level permissions
- Manage Reports & Dashboards
- Import Records
- Export Records
- Mass Transfer
- Mass Delete
- Mass Update and more.

Field-level permissions
- Visibility of fields
- Restrict editing of fields (Read-only)

Go To [**Setup** | Customization |Tabs]

Apps & Add-ons

Apps and add-ons enable integration with external applications and include Google Apps, Zoho Apps, and Other Apps.

If you plan to incorporate Zoho Mail Suite into your Zoho CRM account – which we recommend – then you should also have your e-mail POP# account information at hand.

- Display Name
- Email ID
- Incoming server
- User name
- Password
- Mail handling options (leave mail on server, delete received messages, etc.)
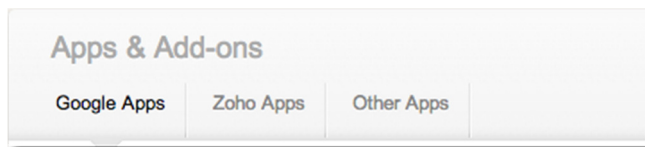
Other integrations are available and can be added to your Zoho Account. You can upgrade or downgrade your account, deactivate users, and cancel licenses, add-ons, or integrations at will, right from within your account.

Google Apps

- Zoho CRM for Google (Contacts | Calendar)
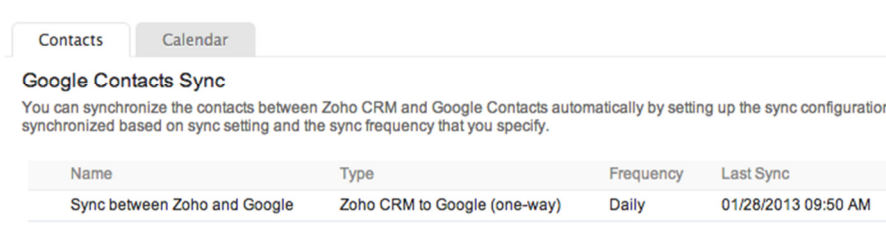
Go To [**Setup** | Apps & Add-ons | Google Apps]

Note: Zoho CRM Editions and Features were updated June 2013. Check out feature differences and pricing between Old and New Editions at: https://www.zoho.com/crm/help/erutaef321.html#users. Accounts subscribed to Old Professional or Old Enterprise are grand-fathered in and will not experience a price increase or feature-set modification.

Zoho Apps

- Zoho Mail
- Zoho Projects
- Zoho Support
- Zoho Writer
- Zoho Invoice

- Zoho Creator – starts at @$25/ per org per month (limited free version available)
- Advanced CRM Analytics – starts at @$50 for 5 users per month (limited free version available)

  Go To [**Setup** | Apps & Add-ons | Zoho Apps]

Other Apps

- Plug-in For Microsoft Outlook (sync contacts, tasks, events, and email) - $3/user, per month in Old Zoho, Included in New Zoho Professional and Enterprise
- Phone Bridge (connect PBX systems for integrated inbound/outbound calling) - $6/user, per month in Old Zoho, Included in New Zoho Enterprise.
- Zoho Mobile Edition (get Zoho CRM on smartphones and tablets) - $3/user, per month in Old Zoho, full features included in New Zoho Professional and Enterprise, Read Only included in Standard.
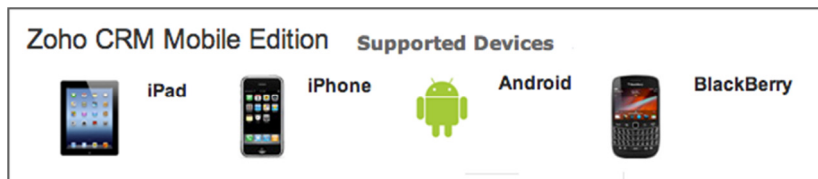
- Plug in for MS Office (create merge documents for Leads, Accounts, Contacts.) $3/user, per month in Old Zoho, Included in New Zoho Professional and Enterprise
- ZOHO CRM for QuickBooks (requires Premiere edition) - $25 org/ per month, Included in New Zoho Professional and Enterprise
- Zoho Campaigns for professional email marketing, starts at $5/ per month

  Go To [**Setup** | Apps & Add-ons | Other Apps]

Subscription Manager

Some add-ons and plug-ins in Zoho CRM needs to be activated for users for them to access the feature. For example, the Mobile Edition licenses, Zoho Mail Add-on, Plug-in for Microsoft Outlook.

Users List:

Full Name	Email Address	Role	Profile	User Status	Zoho Mail Add-on	Zoho CRM Plug-in for Microsoft Office	Zoho CRM Mobile Edition
Employee	someone@yourcrmteam.com	CEO	Administrator	●	●	●	●
Employee	someone@yourcrmteam.com	Manager	Administrator	●	●	●	●
Employee	someone@yourcrmteam.com	Manager	Manager	●	○	●	○
Employee	someone@yourcrmteam.com	Manager	Manager	●	○	○	○

  Go To [**Setup** | Subscription Manager | Activate Users

System Requirements as of July 18, 2013

Operating System	Windows, Linux and Mac OS X
Web Browser	Safari Chrome Firefox 3.0 and above Internet Explorer 7.0 and above
Other requirements	Enable JavaScript Enable Cookies Install Flash plug-in Install Acrobat reader (optional) Install Spreadsheet viewer (optional)

Quick Links for easy reference:

https://www.zoho.com/crm/help/getting-started/
https://www.zoho.com/crm/help/administration/
https://www.zoho.com/crm/help/security/
https://www.zoho.com/crm/help/manage-subscriptions.html#Activate_Add-ons_and_Plug-ins/
http://info.yourcrmteam.com/contact-on-the-verge/

Want help?
Ask us; we know stuff!
Call us at 800-963-1030 or email zohohelp@yourcrmteam.com.