User Management

MODULE 4

ZOHO CRM

Course for Administrators

Table of Contents

Overview

Managing the complexities of security administration is one of the growing concerns in any enterprise, especially those open to e-commerce and those with large networks. In such demanding times, strong and functional security management is essential to safeguard data.

The foundation of any security management is a model that includes role-based access control, enabling all the functionality and authentication that a secured system needs.

Zoho CRM provides security features that define access to the data in CRM as well as to the features of the CRM account. Administrators control these security options in the organization's account.

The role-based security ensures that data is accessible to users based on the organization's hierarchy. Profiles, on the other hand, ensure that users have permission to access only the relevant features in CRM: the various modules, data administration tools, and automation functions they need. Additionally, defining permissions by groups allows you to extend the data-level access to other users with similar job profiles.

Lesson A:

Manage Users

Lesson Objectives

In this lesson, you will:

- Add users.
- Modify users.
- Re-invite users.
- Activate or deactivate users.
- Delete users.

Users

In Zoho CRM, a user is one who manages records, whether their own or those shared by other users, within the organization. In addition to accessing the CRM data, some of the users can perform administrative functions for the smooth running of the CRM account. As administrators, you can add users to the organization's Zoho CRM account, — enabling your employees to carry out their day-to-day tasks independently.

Adding users in CRM is based on your edition(s) and number of user licenses. Each user can sign in to their account with an email address and password. Every user is given a role and profile. The profile determines what features a user is allowed to access and the role determines what data the user can access based on the organization's hierarchy.

Some of the add-ons and plug-ins in Zoho CRM need to be enabled for users before they can access the feature, such as the mobile edition licenses, the Zoho Mail add-on, plug-in for Microsoft Outlook, and more.

Types of Users

Administrators: Users who can access the entire system. There must be at least one administrator who can access all the data and features in your Zoho CRM account.

Example: CEO or any top levels in the organization's hierarchy like top officials or top management.

Other Standard Users: Users who can access data according to their defined permissions (profiles) and roles in the organization.

Example: Sales managers, marketing managers, support agents, etc.

Managing Users

Users with the Manage Users permission in their profile can access the users list and perform tasks such as adding users, modifying user details, and viewing the apps and add-ons that are activated for each user. Make sure that you have created the appropriate roles and profiles before you add a user as these will need to be assigned to the users you add.

Permission Required:

Users with the Manage Users permission in their profile can add/edit users.

Adding users in Zoho CRM

1. The administrator adds a user by providing some basic details like name, email address, role and profile.
2. Once the user's details are added, the system automatically sends an email invitation to the user's email address provided by the administrator. You can add other details such as phone numbers, address, photo, fax, website, date of birth, language, etc. after adding the user.
3. The user accepts the invitation by clicking the access link in the email within 7 days of receiving it.
4. After accepting the invitation, the user completes whichever of the following is applicable:

   - The user is **new to Zoho** and **does not have** a Zoho account:
     - After clicking the access link in the email, the user will be redirected to the sign-up page.
     - The will sign up and create an account with Zoho.
     - On creating the account, the user should click the **Continue signing in** button.
     - The user has to confirm the email address by accessing the link sent in the *confirmation email*.
   - The user **already has an account** with Zoho, but **does not have** a Zoho CRM account:
     - After clicking the access link in the email, the user should click the **Continue signing in** button.
     - The user will be logged in to the Zoho CRM account that is associated with the company's account.

Add Users

The number of users that you can add is based on the number of user licenses purchased. For example, if you want four sales managers and ten sales reps to access your organization's CRM account, you will need to purchase a total of 14 user licenses.

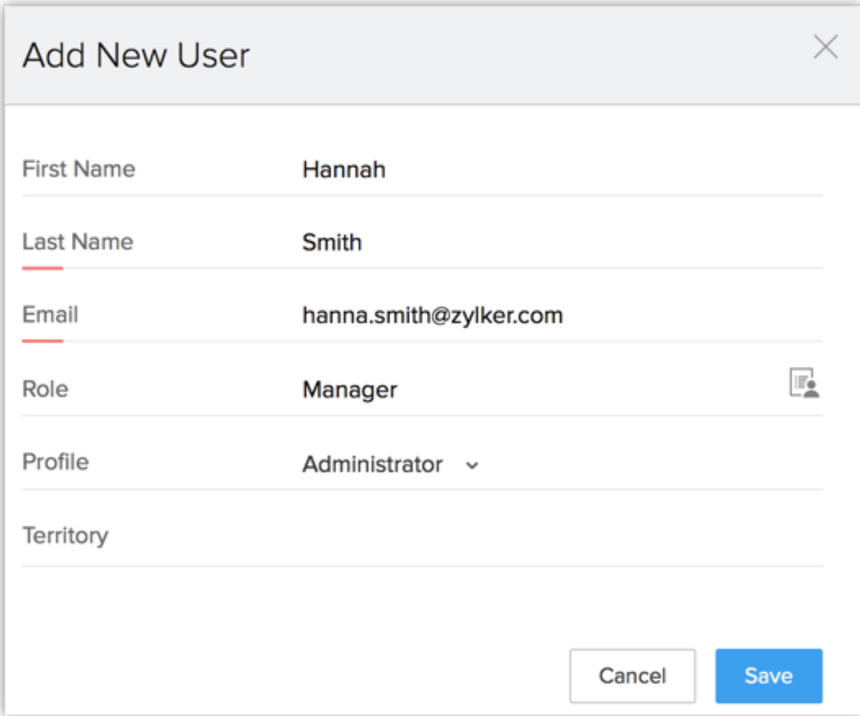
At any given time, if one of those 14 users leaves your company, you can delete the user from your account. By doing so, you will have one user license slot available to add another user. You can now use that available license to add, say, a newly-recruited sales rep.

Please note that Zoho CRM does not charge you for the number of users you have in your account but for the number of user licenses that you have purchased. In the above example, even if you do not add the new recruit to your CRM account, you will still be billed for 14 licenses and not 13.

To add a user

1. Log in to Zoho CRM with **Administrator** privileges.
   Users with *Manage Users* permission in their profile can also access this feature to add users.
2. Go to Setup > Users & Control > Users.

3. In the *Users* page, click **+Add New User**.

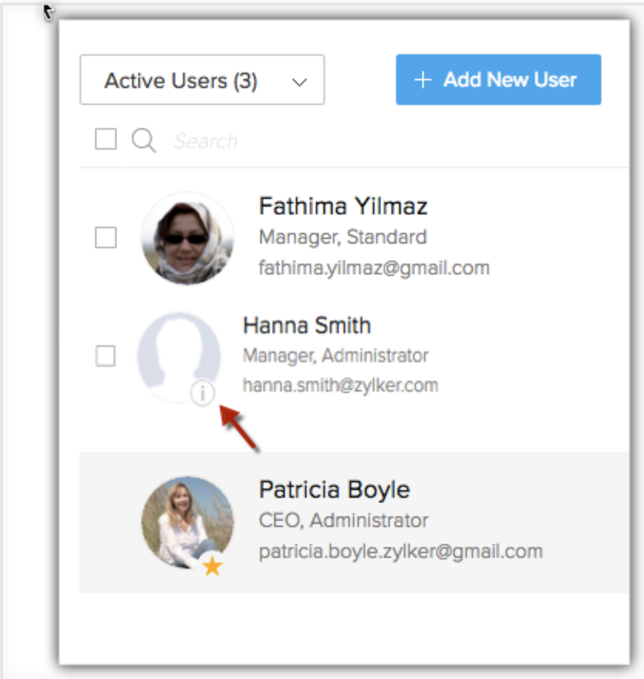


4. In the *Add New User* page, enter the following details:

    - **First Name** & **Last Name**: It is mandatory to enter a last name.
    - **Email:** Enter the user's valid email address that has not already been used to create a Zoho CRM account.
      An invitation will be sent to this email address.
    - **Role**: Choose the role of the user in your organization.
    - **Profile**: Choose a profile that defines the user's access rights in your Zoho CRM account.
      You can add other details like phone numbers, address, photo, fax, website, date of birth, language, etc., after adding the user.
    - **Territory**: Assign a territory for the user.
      This option will be available only if you enable territories.

5. Click **Save**.
   The system sends an invitation to the user's email address. Only when the

user accepts the invitation, will the status of the user change to *Confirmed*.

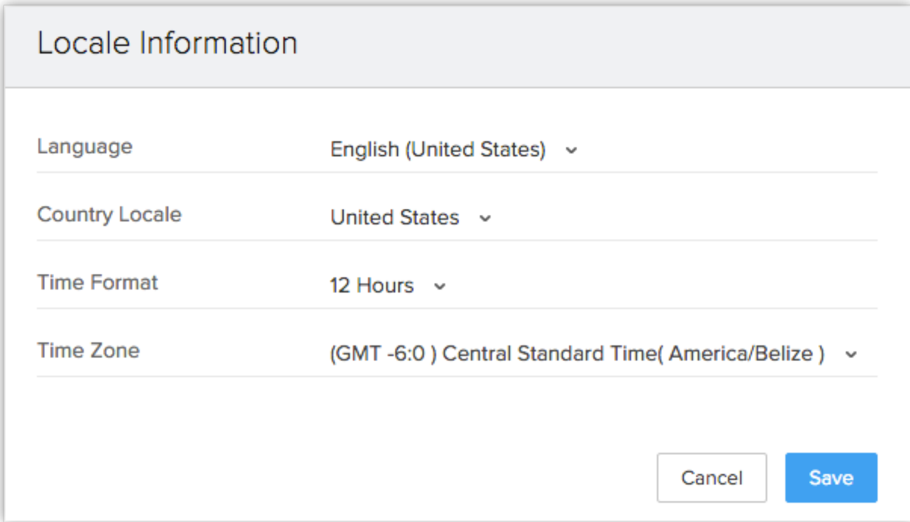


Modify Users

When you add a user, you will start by specifying only their name, email address, role, and profile details. You can add the user's other details , such as phone numbers, address, photo, fax, website, date of birth, language, etc., later, whenever you need.

To modify a user's details

1. Go to Setup > Users & Control > Users.
2. In the *Users* page, select the user from the list to modify the user details or add more information.
3. In the *User's Details* section, click **Edit** for the corresponding section in which you want to modify the user's details. You can provide the following details:
   - **Phone**, **Mobile**, **Website**, **Fax, and Date of Birth**: Enter contact and biographical information about the user.
   - **Address Information**: Enter the user’s full address details.
   - **Language**: Set the language for the user's Zoho CRM account.



- **Country Locale:** Select the user's country from the list.
- **Time Format:** Choose between a 12-hour or 24-hour time format.
- **Time Zone:** Set the time zone for the user's Zoho CRM account.

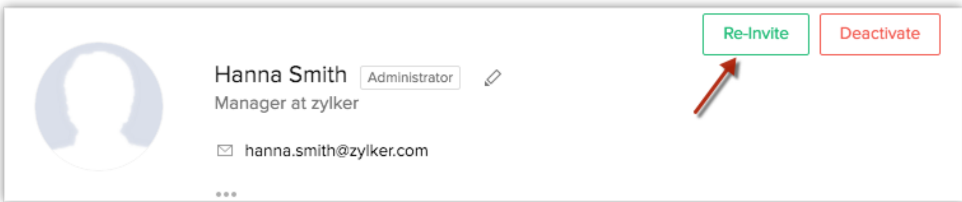
4. Click **Save**.

Re-Invite Users

If a user does not accept the invitation sent by the administrator within seven days, the administrator can resend the invitation to the user. Users who have not accepted the invitation to join the organization's CRM account will be listed under *Unconfirmed Users*. Here you can resend an invite only to the unconfirmed users. If the user is deactivated, you will need to activate them first.

To re-invite a user

1. Log in to Zoho CRM with **Administrator** privileges.
2. Go to Setup > Users & Control > Users.
3. In the *Users* page, select the required user. In the *User's Details* section click **Re-invite**.



4. 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.

When a user is invited to Company A's CRM account and the user...	**What should the user do?**
does not have an existing CRM account.	Click on the access link in the invitation email to join Company A's account.
is already part of Company B's organization account.	Ask the super administrator of Company B's CRM account to delete you from that account. Then click on the access link in the invitation email to join Company A's account.
is already part of Company B's organization account. Also, the user is the super administrator in the same account.	In Company B's CRM account, make another user the super administrator and ask the same user to delete you from that account. Then click on the access link in the invitation email to join Company A's account.
is already part of Company B's organization account. Also, the user is the only active user in the account.	Delete Company B's CRM account and then click on the access link in the invitation email to join Company A's account. In this case, Company B's Zoho CRM account will be closed and all the data will be securely erased. An email will be sent to the user with a link to download the final backup of the data.
is already part of Zoho Docs/Zoho Mail/Zoho Creator in Company B's organization account.	Ask the administrator of Zoho Docs/Zoho Mail/Zoho Creator (of Company B) to delete you from the corresponding product's account. Then

	click on the access link in the invitation email to join Company A's account.
is already part of Zoho Docs/Zoho Mail/Zoho Creator in Company B's organization account. Also, the user is the Administrator of the account in these products.	In Company B's Zoho Docs/Zoho Mail/Zoho Creator account, make another user as the administrator and ask the same user to delete you from that account. Then click on the access link in the invitation email to join Company A's account.
You are already part of Zoho Docs/Zoho Mail/Zoho Creator in Company B's organization account. Also, you are the only active user in the account.	Delete Company B's Zoho Docs/Zoho Mail/Zoho Creator account, and then click on the access link in the invitation email to join Company A's account. In this case, Company B's Zoho CRM account will be closed and all the data will be securely erased. An email will be sent to the user with a link to download the final backup of the data.

Activate and Deactivate Users

After a user accepts your invitation to join Zoho CRM, their account will be in an **Active** state. Active users can log in to Zoho CRM and perform their tasks. When an employee goes on a long break or moves to another organization, you should immediately deactivate the user's Zoho CRM account to maintain data security. Before deactivating you must transfer the ownership of the records to other users. If a user's Zoho CRM account is **Inactive**, the user cannot sign in to Zoho CRM and access data.

Zoho CRM bills your organization for the total number of user licenses purchased. After deactivating a user, the user license can be used to add another user. If you do not wish to add another user, you can unsubscribe the user license.

Deactivating a user is different from deleting a user. When you deactivate a user:

- The user will no longer be able to access the CRM account.
- No one will be able to log in to the service using the deactivated ID.
- You are free to use the same user license to add another user.
- The user license is not canceled. The number of user licenses that you have purchased remains the same, and you will be billed accordingly unless you reduce your total user licenses.
- The user will be listed under **Deactivated Users**.
- If you decide to activate the user again, you can re-invite the deactivated user.

To deactivate a user

1. Log in to Zoho CRM with Administrator privileges.
2. Go to Setup > Users & Control > Users.
3. In the *Users* page, select the **Active Users** view.
4. In the *Active Users* section select the checkbox corresponding to the users that you want to deactivate.
5. Click **Deactivate**.
   The user will be deactivated and a system-generated email will be sent to the corresponding user.

To activate a user

1. Log in to Zoho CRM with Administrator privileges.
2. Go to Setup > Users & Control > Users.
3. In the *Users* page, select the **Inactive Users** view.
4. In the *Inactive Users* section select the checkbox corresponding to the users that you want to activate.
5. Click **Activate**.
   The user will be activated and a system-generated email will be sent to the corresponding user.

Delete Users

When a member of your organization quits or is replaced you may have to delete the member from you CRM account. Note that deleting a user from Zoho CRM is not the same as deactivating them or closing their Zoho account. They are deleted only from Zoho CRM.

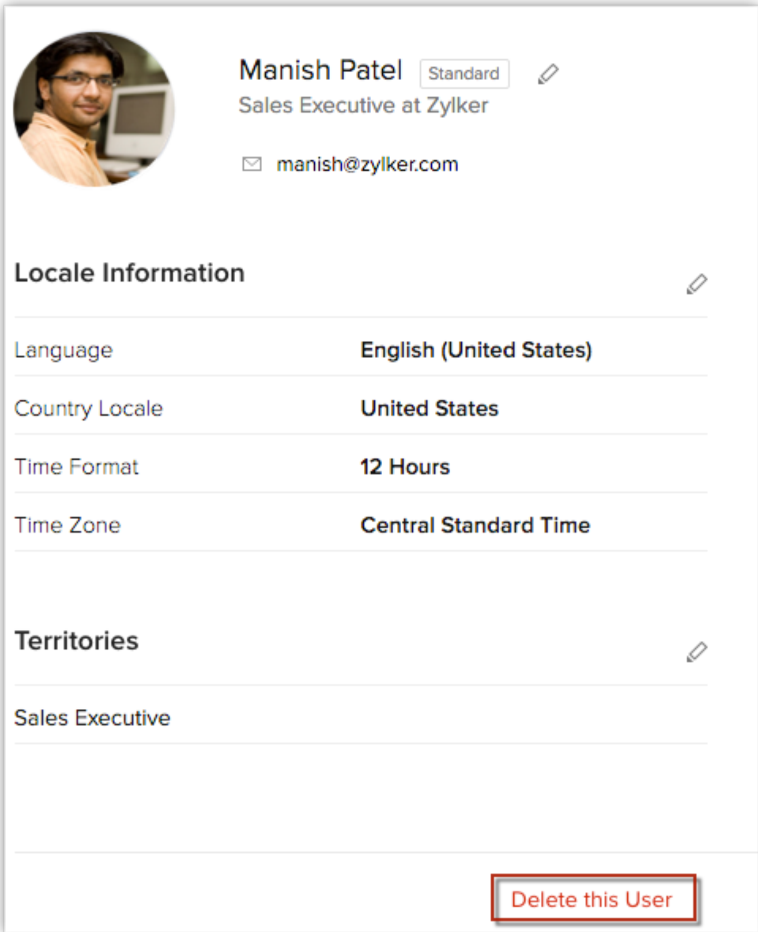
When you delete a user:

- You cannot undo the action. If you don't want the member to access CRM but you are not sure about deleting the user, you can deactivate them.
- The records that belong to the deleted user remain in Zoho CRM. You can transfer them to another member at any time. It is recommended that you transfer the records before you delete a user.
- You cannot reinvite a deleted user. If you extend an invitation to a user you have deleted, the user will be added again in Zoho CRM just like any other new user.
- Only the super admin of your account can delete a user.
- A user deleted from Zoho CRM will still be able to access other Zoho services from the same email address without any problems.
- All the integrations configured by the deleted user will be lost after you delete the user.

- Deleting a user does not cancel the user's license. To cance al license you must manage your subscriptions.

To delete a user

1. Go to Setup > Users & Control > Users.
2. Click on the user you wish to delete.
3. Click the **Delete this user** link at the end of the *User Details* section.
   Read the consequences of deleting a user and confirm the action. The user will be deleted from Zoho CRM and will appear under the *Deleted Users* view.


Manish Patel
Standard
Sales Executive at Zylker
manish@zylker.com
Locale Information
Language
English (United States)
Country Locale
United States
Time Format
12 Hours
Time Zone
Central Standard Time
Territories
Sales Executive
Delete this User

Activity A-1

Adding Users

Before You Begin

- Verify that you are logged into Zoho CRM as an administrator.
- Collect some basic details about a user you will invite to Zoho CRM: name, role, and profile type.

Scenario

At Zylker, there has been a change in personnel. An Assistant Sales Manager, Jack Peters, has resigned and a new Assistant Sales Manager, Jim Smith, has recently joined the organization.

You need to add Jim Smith as a user in your organization's Zoho CRM account. You will assign him a Manager role and grant him the permissions of the Standard profile.

Note:

In a real-world work environment, you would define roles and profiles before adding users. During this activity, you will add a user with Zoho CRM's default roles and profiles. Once you add a second user, you will be allowed to create customized roles and profiles.

You need to

1. Create a new user account named Jim Smith and assign the Manager role and the Standard profile to the account.
2. Confirm Jim Smith's user account and verify that the user account is activated.
3. Verify that the user is now an active user in your Zoho CRM account.

Lesson B:

Clone Profiles

Lesson Objectives

In this lesson, you will:

- Create profiles.
- Manage profile permissions.
- Delete profiles.

Profiles

Profiles in Zoho CRM help you define permissions for a set of users. For instance, the permissions required for a person from sales team might differ from the permissions required by a person on the marketing team. You can define the permissions for each profile as needed and specify the profile when adding a user.

By default, two profile permissions are provided. You can clone these profiles or you can create new ones.

- **Administrator Profile**: This profile has access to all the features in your Zoho CRM account.
- **Standard Profile**: This profile has limited access to the features in your Zoho CRM account.

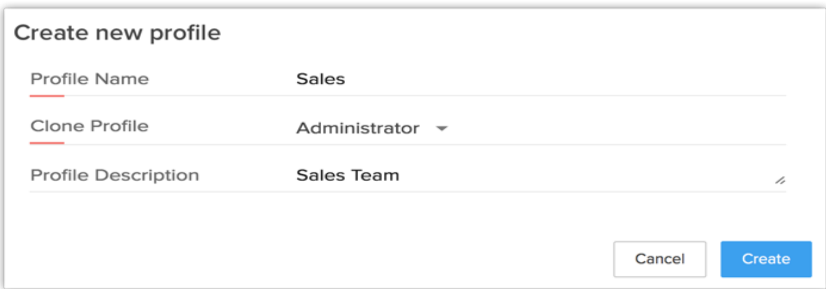
Profile Permission:

Users with the Manage Profiles permission in their profile can access this feature.

Create Profiles

To create a profile

1. Go to Setup > Users & Control > Security Control > Profiles.
2. Click +New Profile.
3. In the Create new profile page:
   a. Enter the name of the new profile.
   b. Choose the profile which should be cloned.
   c. Specify a **Profile Description**, if needed.



4. Click **Create**.

Managing Profile Permissions

To make the process of managing profile permissions easier, the permissions have been grouped in such a way that you will have no problem customizing them as needed. You can enable or disable permission with a single click rather than having to go through the hassle of disabling each checkbox. As your changes are instantly saved, you don't have to worry about losing your progress.

List of Permissions

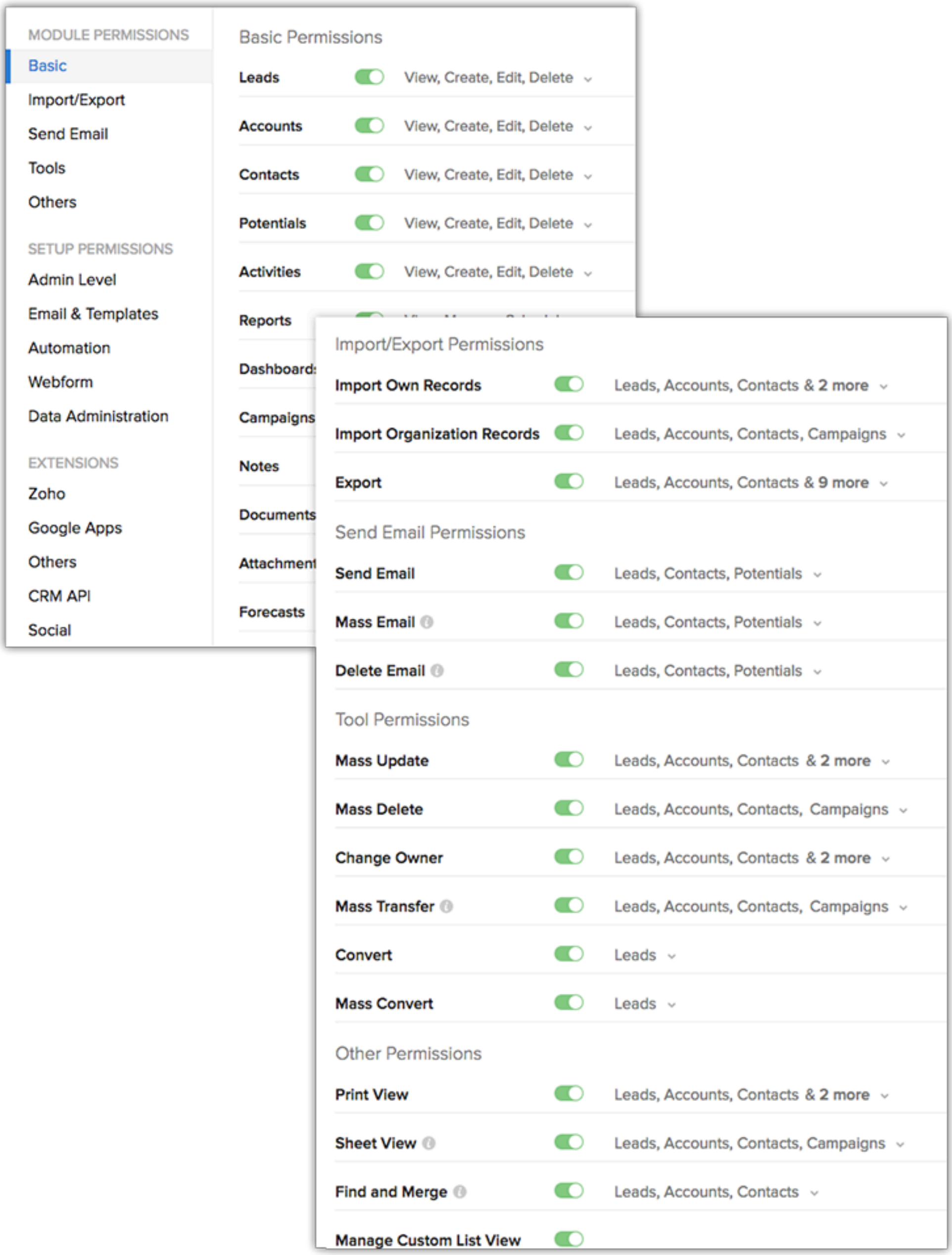
The module permissions are grouped in the same way that they appear in CRM, and the Setup permissions are grouped like they are in the Setup page, making it easier for you to find them. There are three main types of available permissions:

Module Permissions

With module permissions you can define which module(s) the users associated with a particular profile will have access to. You can also specify what actions they can perform.

Basic Permissions

Basic permissions are based on the modules. The permissions for different actions can be changed using the check box in the drop-down next to each module permission. Some of the common actions include view, create, edit, delete, and share.



Advanced Permissions

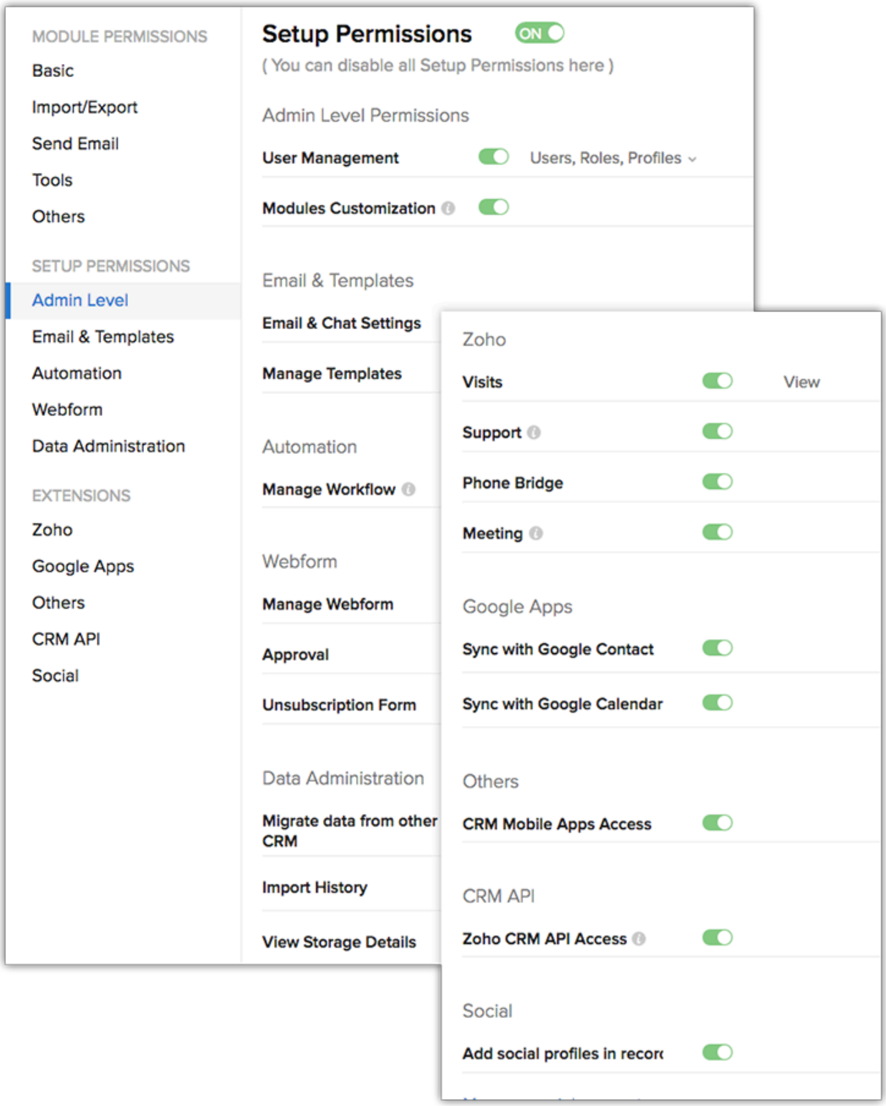
Permissions like Import/Export, Send Email, Tool, and other advanced permissions can be enabled only when their pre-requisites are also enabled. For example, a user can use the Mass Email function only when Send Email permission has been enabled for that profile. This makes sure that users can't exceed their permissions.

Note:

- If you have disabled an advanced permission, and you later disable and re-enable a basic permission associated with it , the advanced permissions won't be automatically renabled. You will need to manually re-enable the appropriate permissions.

Setup Permissions

Setup permissions can be used for defining the configuration of different features in Zoho CRM. These permissions let you decide if the user associated with this profile can manage Templates, Automations, Webforms, Data Administration, etc. Since Setup permission is not something that is generally given to all users, you have the option of disabling all of the Setup permissions at one go.



Admin-Level Permissions

Only users with the Administrator profile can customize Company Details, Fiscal Year, Business Hours, Territory Management, De-duplicate, CRM Variables, Copy Customization, Organization Email and Currency.

Extension and Other Permissions

Extension permission lets you define permissions for extensions, CRM API, and Social settings. These permissions deal with how Zoho CRM communicates with third-party integrations. Additionally, there are other permissions for Zoho Apps, Google Apps, CRM API, and Social settings.

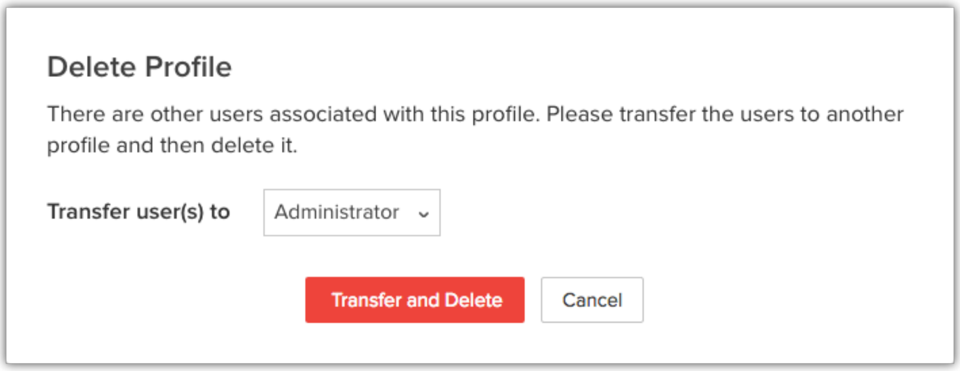
Delete Profiles

To delete a profile that is not in use

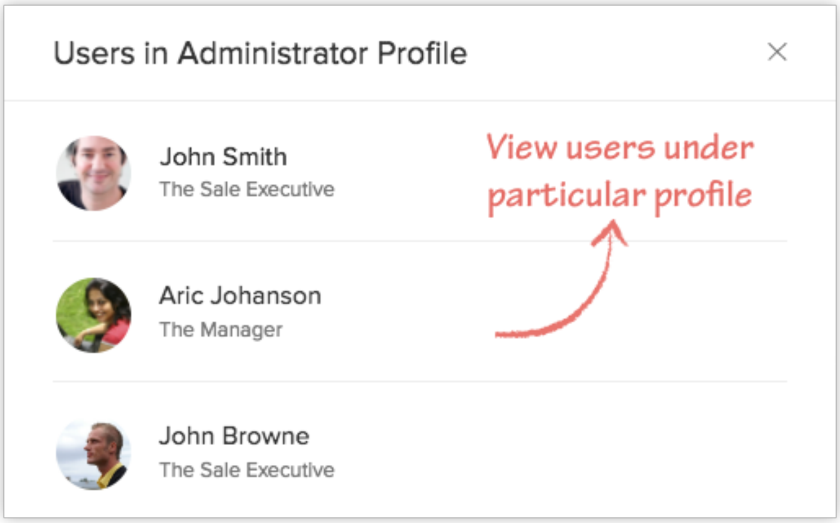
1. Hover the cursor over the profile you wish to delete and click on the **more** button that appears.
2. Click **Delete**.
3. In the confirmation page, click **Delete** again.

Notes:

- When you want to delete a profile that is associated with a user, you will be prompted to transfer the user to another profile before deleting them.



- Click on the more button in the *Profile View* page and select **View Users** to know which users are associated with the profile.



Activity B-1

Create Profile

Before You Begin

- Verify that you are logged into Zoho CRM as an administrator.

Scenario

Zylker has launched a massive recruitment drive, and new managers and representatives are expected to join the organization. As the Zoho CRM administrator, you need to assign permissions to match the tasks that need to be performed by the various users. You will create four profiles, named Sales, Managers, Representatives, and Trainees. The Sales and Managers profiles will be based on the Administrator profile so that they have the permissions necessary to manage their teams independently. The other two profiles will be based on the Standard profile. You may delete the Trainees profile later, when it is no longer needed. After that you will change the following permissions for the Representatives profile:

- Remove the Delete permission for the Leads, Accounts, Contacts, Potentials, and Campaigns modules.
- Remove the Delete Document and Delete Document Folder permissions.
- Enable the Quickbooks Integration permission.
- Enable the View Storage Use permission.

You will also need to modify Jim Smith's account and assign the Sales profile to him.

Note:

In a real-world work environment, you would define roles and profiles before adding users. During this activity, you will add a user with Zoho CRM's default roles and profiles. Once you add a second user, you will be allowed to create customized roles and profiles.

You need to

1. Create a new user profile named ***Sales*** for sales managers.
2. Clone the Sales profile to create a profile named ***Managers*** for managers of other departments.
3. Create a user profile named ***Representatives***.
4. Clone the Representative's profile to create a profile named ***Trainees***.
5. Delete the *Trainees* profile after transferring the existing details to the Representatives profile.
6. Modify the *Representatives* profile and include a suitable description.
7. Edit the *Representatives* profile and modify the permissions mentioned in the scenario above.
8. Modify Jim Smith's user account and assign the Sales profile to the account.

Lesson C:

Manage Roles

Lesson Objectives

In this lesson, you will:

- Create roles
- Assign roles to users
- Delete roles

Roles

In any organization, users will require access to a wide range of data in order to perform their sales, marketing, customer service, and inventory tasks. The type of data required by users varies based on their job roles. As a Zoho CRM administrator, you need to allow users to access the customer data they need and prevent users from accessing the customer data they don't need.

Roles refer to the hierarchical positions within an organization. Users at a higher level have access to records owned by users at a lower level. Creating roles in Zoho CRM enables you to provide users with the right level of access depending on each user's position in the hierarchy of the organization. Zoho CRM allows you to create roles and assign them to users based on their job tasks. The CEO and Manager roles are available by default. You can use these default roles to create other roles and set up your organization's role hierarchy.

Some of the key features that you should keep in mind while creating roles and assigning them to users include:

- Users with a **CEO role** have access to the entire database within your organization.
- Users with the Manager role can view or edit their subordinates' records if they have the **Read** or **Edit** permissions for the applicable record type.
- Users in the same role cannot access each other's records, unless the Share Data with Peers option is enabled. For example, the VP of Engineering cannot access the VP of Marketing's data and vice versa, although they are on the same level and in the same role in their organization's hierarchy.
- Enable the **Share Data with Peers** option to enable mutual access to data among users of the same role.
- Users in upper levels of the organization’s hierarchy cannot access data shared using custom sharing rules unless the Superiors Allowed option is enabled.
- Users with read/write access permissions to primary records can add notes and attachments, and view related records. They can also send emails from a record.

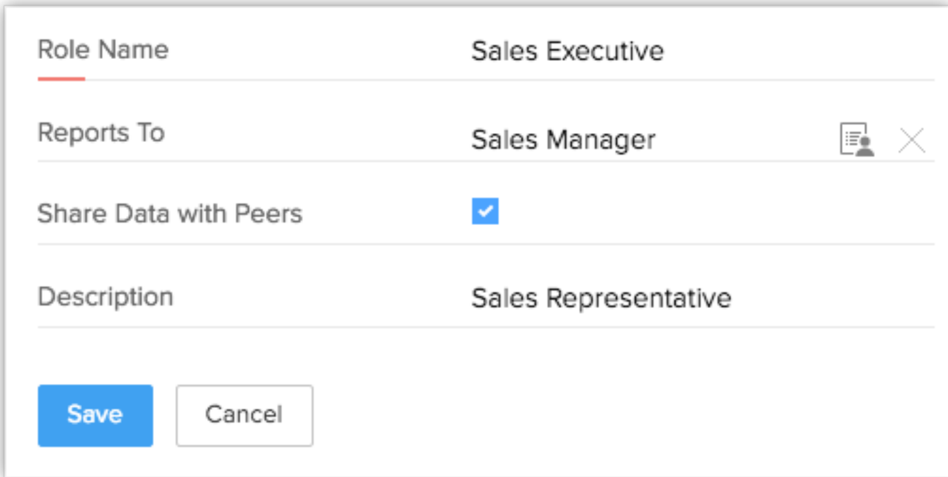
Profile Permission:

Users with the Manage Roles permission in their profile can access this feature.

By default, the CEO and Manager roles are enabled for your Zoho CRM paid account. In addition, you can create different types of roles for users based on their position in your organization's hierarchy and the edition of Zoho CRM you have. Note that you can create roles only if you have more than one user in your Zoho CRM account.

To create a role

1. Go to Setup > Users & Control > Security Control > Roles.
2. In the *Roles* section, click **+New Role**.
3. In the *New Role* page, do the following:
    a. Enter the **Role Name**. Do not add a role with the same name.



    b. Select the immediate superior's role from the **Reports To** lookup. If you do not select the superior's role, the new role will be created directly under the CEO role.
    c. Select the **Share Data with Peers** check box if you would like to enable access rights to peers.
    d. Specify the **Description** for the role.
4. Click **Save**.

Notes:

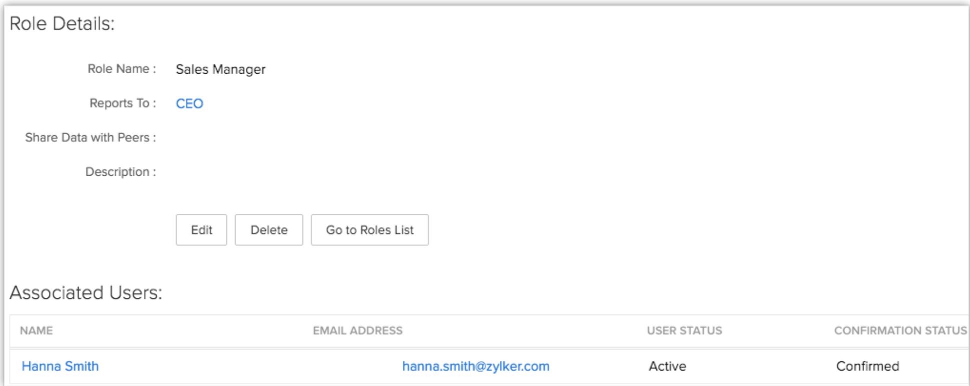
- A user with an Administrator profile will have access to all the data irrespective of the role assigned to that user.
- You can create roles only if you have **more than one user** in your Zoho CRM account.

Assign Roles to the Users

After creating roles, you can assign them to the users in your organization. A user with an Administrator profile will have access to all the data irrespective of the role assigned to that user.

To assign a role to a user

1. Go to Setup > Users & Control > Security Control.
2. In the *Users* page, click the **<User Name>.**
3. In the *User Details* page, click **Edit**.
4. Select the specific **Role** from the lookup box.
5. Click **Save**.



Delete Roles

While deleting a role, you need to transfer the users in that role to a different role.

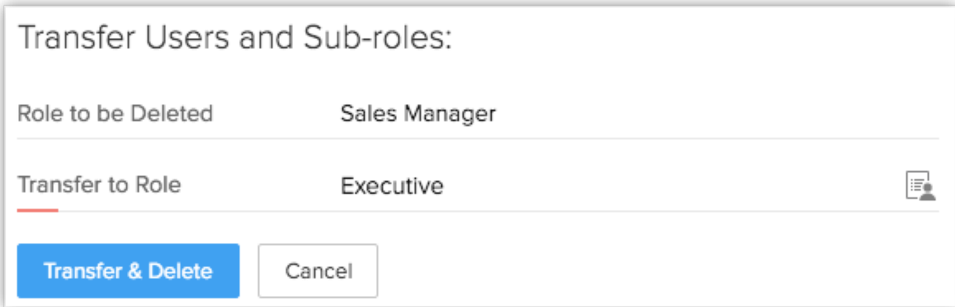
To delete a role

1. Go to Setup > Users & Control > Roles.

2. In the *Roles* page, click the **Role** name.

3. In the *Role* Details page, click **Delete**.

4. In the *Delete Role* page, click on an existing Role to transfer the child roles to the selected role.



5. Click **Transfer & Delete**.
   Now the role and its child roles are transferred to the new role and a different organizational hierarchy is created.

Activity C-1

Create Roles

Before You Begin

- Verify that you are logged into Zoho CRM as an administrator.
- Verify that more than one user is added in your Zoho CRM account.

Scenario

Your sales manager wants you to add new roles to implement your organization's hierarchy in Zoho CRM. You need to create a role called **Sales Managers** under CEO. Then, create two new roles called **Sales Representatives** and **Support Executives** under **Sales Managers**. Finally, you need to assign user Jim Smith to the **Sales Managers** role.

You need to

1. Add a new role named **Sales Managers**.
2. Add new roles named Sales Representatives and Support Executives.
3. Modify Jim Smith’s user account and assign the Sales Managers role to his user account.

Lesson D:

Data Sharing Rules

Lesson Objectives

In this lesson, you will:

- Manage default data sharing rules
- Create data sharing rules

Data Sharing Rules

By default, access rights to CRM records is set as private so that the record owner and their manager can oversee the CRM data they are responsible for. However, using the data sharing rules, you can extend the access rights to users belonging to other roles and groups. Once the data sharing rules are configured, users associated with other roles and groups can gain additional access to the records that belong to other users.

Key Features

- By default, all the modules have a **Private** option.
- If the organization-wide permission is set as **Public Read/Write/Delete**, everyone can access and update all the users' data. Role Hierarchy and Sharing Rules will not be applied in this case.
- If the organization-wide permission is set as **Read Only**, everyone can only view the other users' records. In this case other users cannot modify an owner's records.
- If the organizational permission is set as **Private**, the Role Hierarchy and Sharing Rules can be applied.
- You cannot restrict the accessibility set in your organization's default permissions by creating Sharing Rules. You can only extend additional data visibility
- Records that belong to you and your subordinates (if any) will always be shown in the Import History.
- All the Attachments, Notes, Emails, and Competitors belonging to a record are accessible to anyone able to view that record.
- Forecasts will always be private.

Manage Default Data Sharing Process

You can provide the following types of access levels to users in Zoho CRM modules:

- **Private:** Only the record owner and their superior can view the record.
- **Public Read Only:** Users can view others' records but cannot modify and delete the records.
- **Public Read/Write/Delete:** Other users can view, modify, and delete the records.

Profile Permission Required:

Users with the Manage Data Sharing permission can access this feature.

Notes:

- By default, access rights to CRM records is set as private so that the record owner and their manager can oversee the CRM data.
- The organization-level data sharing model is not yet implemented for Notes, Reports, Dashboards, or Email modules.

To manage the default permissions

1. Go to Setup > Users & Control > Security Control > Data Sharing Settings.
2. In the *Data Sharing Settings* page, click **Edit All Default Permissions**.
3. In the *Edit Default Organization Permissions* page, update the following Access Privilege for the modules:
    - Private
    - Public Read Only
    - Public Read/Write/Delete
4. Click **Save** after updating access privileges for all the modules.

Create Data Sharing Rules

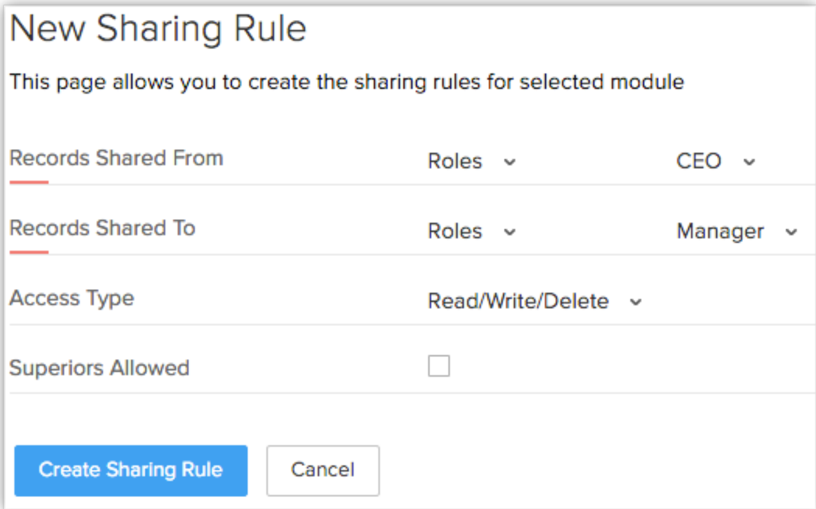
This feature helps you to create rules to provide access or restrict users from viewing your data in various modules.

Profile Permission Required:

Users with the Manage Data Sharing permission can access this feature.

To create a data sharing rule

1. Go to Setup > Users & Control > Security Control > Data Sharing Settings.
2. In the *Data Sharing Settings* page, click **New Sharing Rule** for the corresponding module.
3. In the *New Sharing Rule* page, do the following:
    a. Specify from whom the records are shared.

    b. Specify to whom the records are shared.
    c. Choose the **Access Type** from the drop-down list.
    d. Select the **Superiors Allowed** check box to allow data sharing to the superiors.
4. Click **Create Sharing Rule**.

Activity D-1

Create Data Sharing Rules

Before You Begin

- Verify that you are logged into Zoho CRM as an administrator.

Scenario

You need to ensure that the lead records created by the sales representatives are accessible to the Support Executives role in Read Only mode. You will need to create a suitable data sharing rule and compute it after creating it.

You need to

1. Create a lead sharing rule to share records between the Sales Representatives and Support Executives roles.
2. Compute the lead sharing rule you have created.

Lesson E:

Manage Groups

Lesson Objectives

In this lesson, you will:

- Create groups
- Assign groups to users
- Delete groups
- Share data with groups

Groups

In Zoho CRM, you can create different types of groups, or sets of users, to manage a set of common records. Groups can be used to set up team selling, team support, event management by a group of marketing users, and more. Users associated with a particular group can access the records shared to a particular group and perform any necessary operations on the records.

Profile Permission:

Users with the Manage Groups permission in their profile can access this feature.

Key Features

- A group consists of users, roles, roles & subordinates, and sub-groups.
- You cannot assign records directly to the groups.
- Records can be shared with groups by setting up data sharing rules.
- Users, roles, and roles & subordinates can represent multiple groups.

Group Members

You can manage groups with the following combinations:

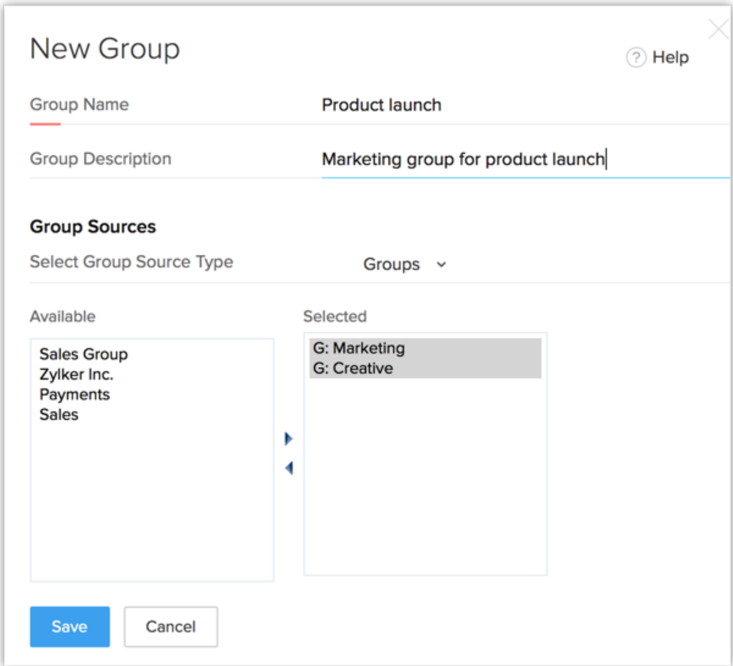
- **Users:** Only users.
- **Roles:** All users associated with the Roles can become members of the groups.
- **Roles & Subordinates:** All users associated with the roles and subordinate roles can become members of the groups.
- **Sub-groups:** All users belonging to a particular group can become members of the new group.

Create Groups

You can create different types of user groups and share the common records among groups.

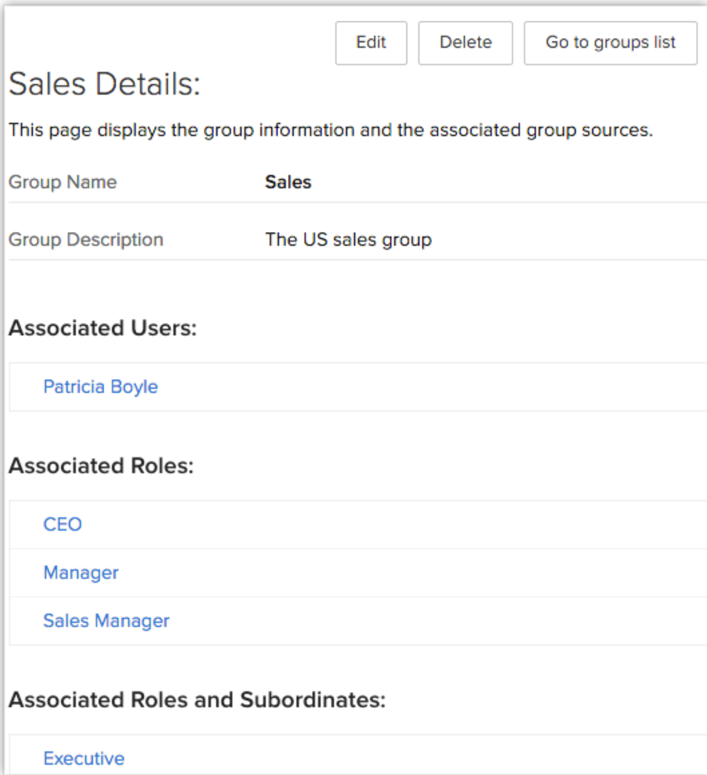
To create a group

1. Go to Setup > Users & Control > Groups.
2. In the *Groups* section, click **Create New Group**.
3. In the *New Group* page, do the following:
    - In the *Group Details* section, specify the **Group Name** and **Description** for the group.



    - In the *Group Source* section, select the group members. You can select users, roles, roles & subordinates, and different groups as members of the new group.

4. Click **Save**.



Assign Users to Group

You can assign users to multiple groups and they can access data according to the permissions in the profile and sharing rules.

Notes:

You can assign users to multiple groups and they can access data as per the permissions in the profile and sharing rules.

To assign users to a group

1. Go to Setup > Users & Control > Groups.
2. In the *Groups* section, select the group to which you want to assign users.
3. In the *Group* Details page, click **Edit**.
4. Under *Group Sources*, select the users.
   You can select users, roles, roles & subordinates, and different groups as members of the new group.

5. Click **Save**.

Delete Groups

Periodically you may consider cleaning up unwanted groups using the delete function. While deleting, all the data sharing rules will be calculated automatically, updating the changes, so you won't need to recalculate them.

To delete a group

1. Go to Setup > Users & Control > Groups.
2. In the *Groups* page, the list of group names will be available.
3. Click the **Delete** button to remove any group from this list.

Share Records with Groups

In Zoho CRM, records are always owned by the user. However, access rights to the records can be extended to other users by grouping a set of users and setting up sharing rules for each module. After setting up the sharing rules, group members can access records in CRM modules according to the permissions in their profile.

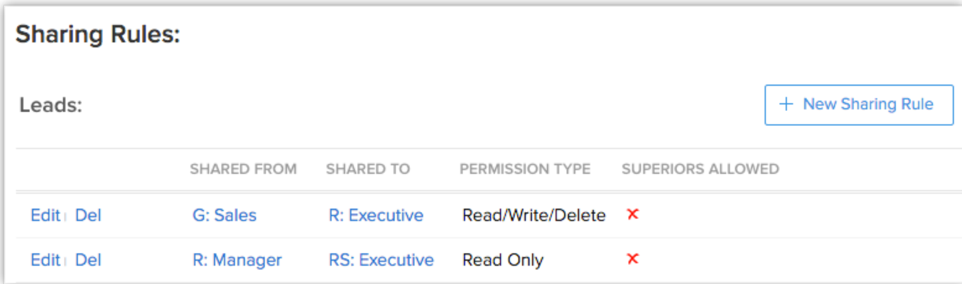
For example, if User A doesn't have access to the Potentials module, they cannot access the potentials by setting up data sharing with groups.

- The owner has all rights to their records.
- Records cannot be owned by groups. However, records can be shared with other users by setting up groups and data sharing rules.
- A user must have profile-level permission to access the records.
- To apply the record sharing, you must recalculate after setting up the sharing rules.

To share data with groups

1. Go to Setup > Users & Control > Security Control > Data sharing Rules.

2. *In the Data Sharing Rules* page, set up sharing rules for each module.



3. Click **Save**.

Activity E-1

Create Groups

Before You Begin

- Verify that you are logged into Zoho CRM as an administrator.

Scenario

You need to create a new group named 'Sales Team.' You need to add the Sales Managers, Sales Representatives, and Support Executives roles to the new group. Finally, create another group named *Trainees* based on the Sales Team group.

You need to

1. Create a new group named **Sales Team** and add the roles to the group.
2. Create a new group named *Trainees* based on the **Sales Team** group.

Lesson F:

Reporting Hierarchy

Lesson Objectives

In this lesson, you will:

- Enable reporting hierarchy
- Assign Reporting Mangers to users
- View and modify reporting hierarchy
- Share records within the organization
- Learn how reporting hierarchy changes associated CRM functions.

Reporting Hierarchy

In Zoho CRM's reporting hierarchy, you can set up the organization's hierarchical structure based on your user roles, and you can assign users to the appropriate reporting managers for well-defined record accessibility. In this structure, a user is assigned a reporting manager who is entitled to view or access the user's data.

Any member who is at a higher role than the user can be chosen as the reporting manager. You can also choose whether the non-reporting members of your organization are managed by any superior at a higher role or by the admin and/or super admin. This structure ensures controlled access of information within the organization, in part by ensuring that a user has only one reporting manager.

Example: John Peters, the CEO of Zylker Inc., is in the administrative role and can access the entire organization's data. Under him are two Sales Managers, Amelia Burrows and Emily Ross. According to Zylker's organizational hierarchy, Sales Executives report to the Sales Managers, so each manager will have sales executives below her and will have access to their data. The VP of Sales, Mark Houston, is the non-reporting member in the organization, and his data will be accessible to John Peters.

Permission Required:

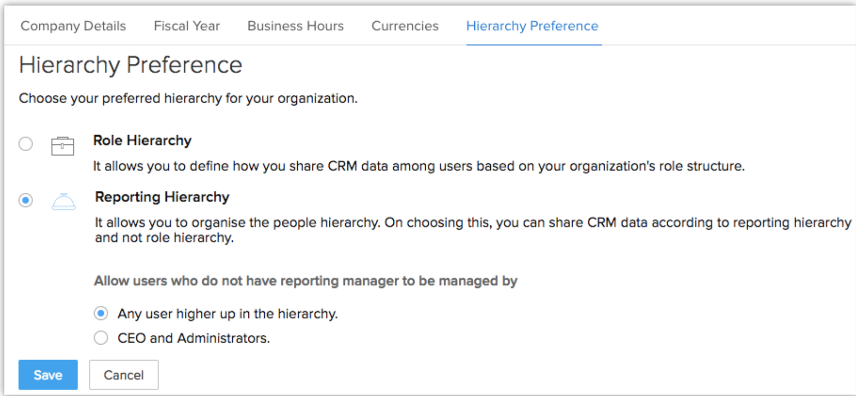
Users with the Administrator profile can access this feature.

Enable Reporting Hierarchy

Reporting hierarchy lets you define a user's data visibility. A user's reporting manager can be any person who occupies a higher role. Users who do not require a reporting manager can be retained as non-reporting members, and you can choose whether their data should be visible to any superior a at higher role or the super admin (CEO)/Administrator of the organization.

To enable reporting hierarchy

1. Go to Setup > General > Company Details > Hierarchy Preference.
2. In the *Hierarchy Preference* page, click **Reporting Hierarchy**.
3. Select an option to define how non-reporting users are managed:
   - Any user higher up in the hierarchy.
   - Super admin and Administrators.

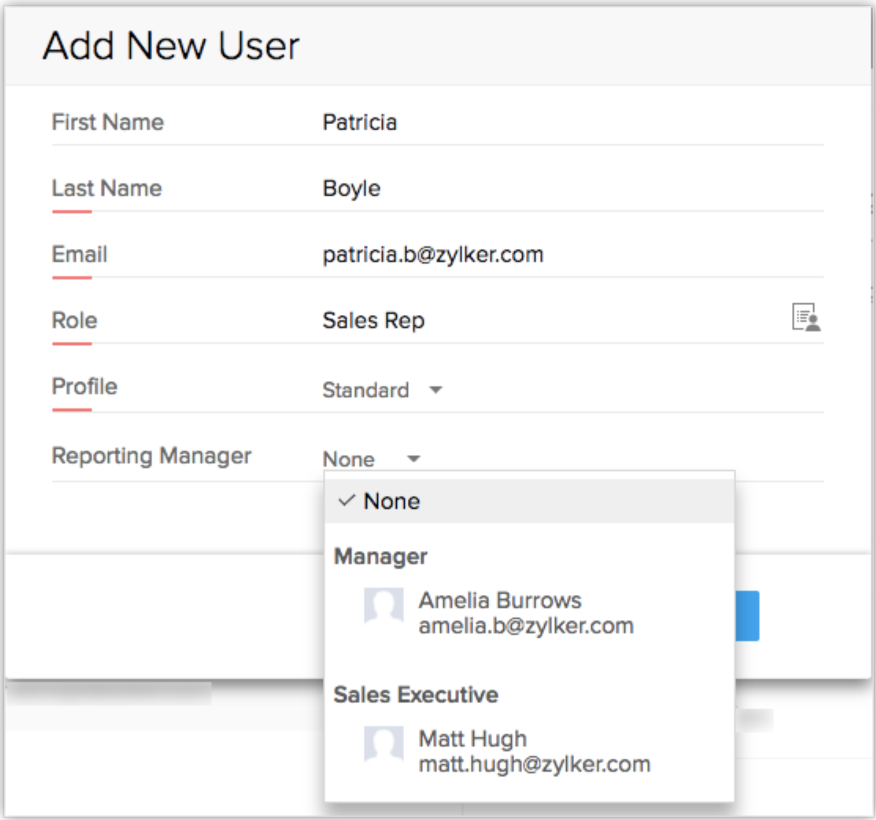


Assign Reporting Managers to Users

Once you define the reporting hierarchy structure for your organization, you are ready to choose reporting managers for the users. Any person who is at a superior role can be chosen as the user's reporting manager.

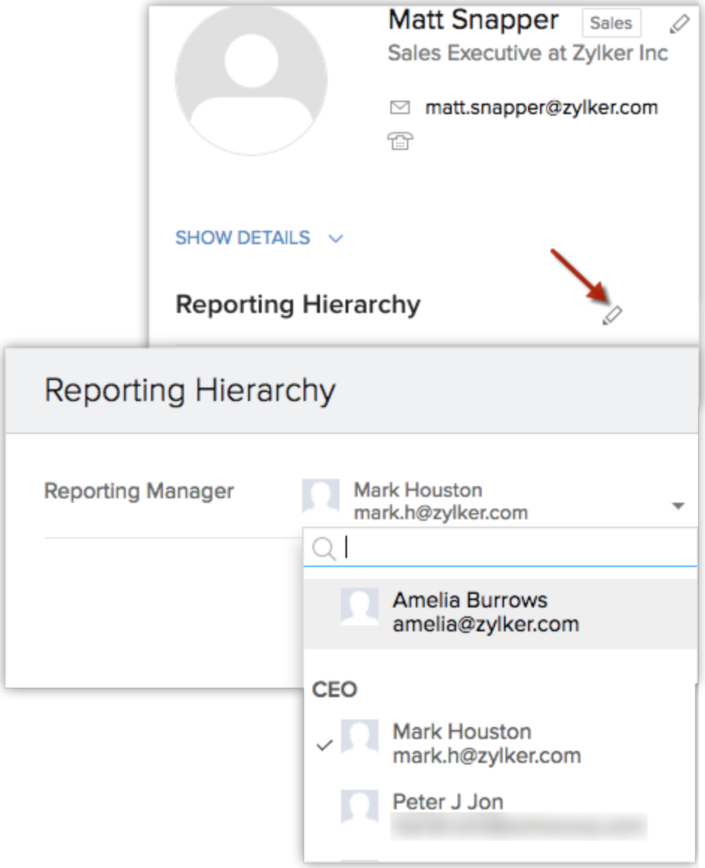
To assign a reporting manager to a new user

1. Go to Setup > Users and Control > Users > Add New User.
2. Enter the user's details.
3. Select a **Role** from the drop-down list.
4. Select a **Reporting Manager** from the drop-down list.
   All the users superior to the selected role are listed.
5. Click **Save**.



To change the reporting manager of a user

1. Go to Setup > Users and Control > Users > Add New User.
2. Select a user whose reporting manager you want to change.
3. Under *Reporting Hierarchy*, click the ***Edit*** icon.
4. Select the **Reporting Manager** from the drop-down list.
5. Click **Save**.



Notes:

Under a reporting hierarchy users are restricted from sharing their data with their peers.

View Reporting Hierarchy

Zoho CRM lets you view a user's reporting details with one click. The user information will display a user's reporting manager as well as subordinates (if applicable). This data will not be visible if the hierarchy preference is changed or disabled. Additionally, a non-reporting user's data will not be displayed.

To view reporting hierarchy

1. Go to the *Users* page and select a **user**.
2. In the right panel, you can view the **Reporting Hierarchy**.
   A user's reporting manager and the subordinates are listed

When you delete a user

As an admin you can delete users from the CRM account. There are two conditions you should be aware of when deleting a user:

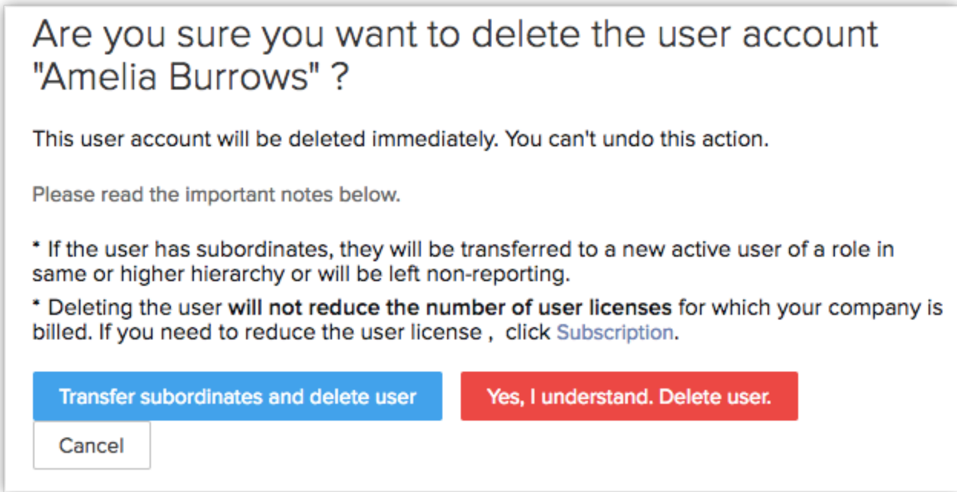
A. If the user does not have any subordinates reporting to them, you can delete the user account as it is.

B. If the user has subordinates reporting to them, you can do either of the following:

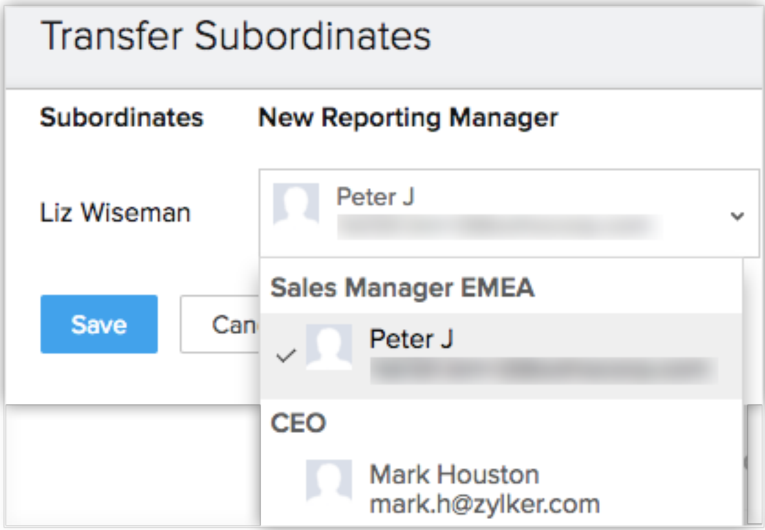
- Transfer the subordinates to another user at an equal or superior role in the hierarchy.
- Do not assign a reporting manager to the subordinates, or leave them non-reporting.

To transfer subordinates

1. Go to Setup > Users and Control > Users.
2. In the *Users* page, select a **User** you want to delete.
3. From the *User's Details* page, click the **Delete this User** link.
4. In the pop-up note, click **Transfer Subordinates and Delete User**.



5. In *Transfer Subordinates* pop-up, select the **New Reporting Manager** from the drop-down list.
6. Click **Save**.



Modify Reporting Hierarchy

As an administrator, you can always alter the designations of the users or the roles in your organization's hierarchy structure. However, modifying users or roles will lead to several changes in the reporting hierarchy too. In the following examples, you will learn how to change the reporting hierarchy based on role modifications.

A. If a reporting manager's role is modified.

When you change a reporting manager's role to different role in the hierarchy, modifications must be made in the reporting structure too. The following examples show some scenarios where changes to a reporting manager's role require that other changes be made as well.

Case I: A person was a reporting manager for a few users, but has now been demoted to a subordinate role.

For instance, Amelia Burrows was a Sales Manager, and Sales Executives Mark Snap and Liz Wiseman reported to her. If Amelia has not performed well and has been demoted, then Mark and Liz must be assigned a new reporting manager.

Case 2 - A person is a reporting manager for few users but is now promoted to a higher role.

For instance, Amelia Burrows is a Sales Manager (EMEA) and reports to Mark Houston who is VP of Sales. If Amelia is promoted as VP of Sales, then her reporting manager must be changed.

Case 3: A person has changed roles but does not have any users reporting to them, so their role change will not affect the reporting structure.

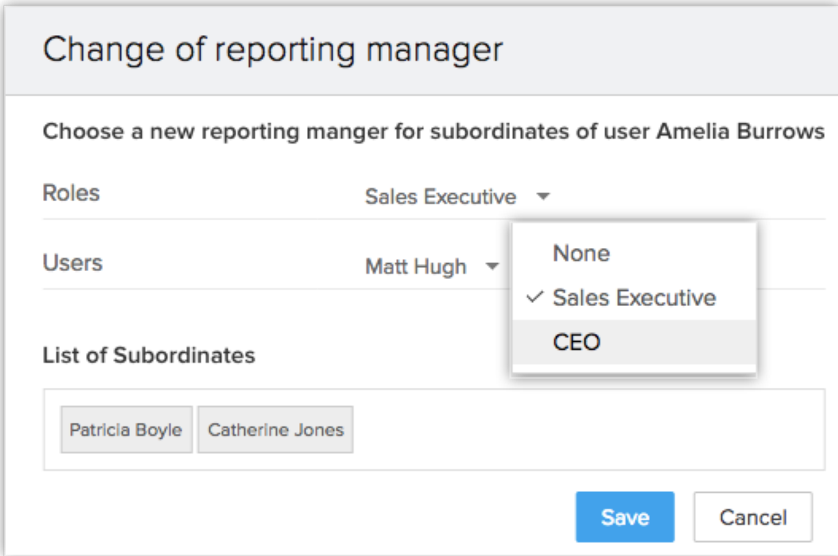
For instance, Allen Stack is VP of Marketing and does not have users reporting to him. If he is promoted or demoted, the role change will not affect the reporting structure for any subordinates. However, depending upon the changes to Allen's role, he may need to be assigned a reporting manager or he may be retained as a non-reporting member.

Case 4: A person was a reporting manager and has now been transferred to another branch or department.

For instance, Emily Ross was a Sales Manager but has now transferred to the marketing branch as a Product Manager. Since sales executive Jonathan Rose used to report to Emily, he must now be assigned a new reporting manager from the sales branch.

To change roles and reporting manager

1. Go to Setup > Users and Control > Users.
2. In the *User* page, select a **User** whose role you want to edit.
3. Under the *User's Detail* page, click the **Edit** icon.
4. In the *Edit User* page, click the **Role List** icon.
5. Select a new **Role** from the *Roles list*.
6. Click **Save**.
7. In the *Change of Reporting manager* pop-up note, select the Role.
   (All the roles at higher hierarchy will be listed here).
8. Select a **User**.
   The users from the selected role will be listed.
9. Click **Save**.



B. If a role is modified

When you add or remove a role from your organization's hierarchy, the reporting structure must be altered.

For instance, as we have seen, our sample company follows this basic hierarchy: CEO > Vice President of Sales > Sales Manager > Sales Executive. The following examples show some scenarios where changes to a role itself require that other changes be made as well

Case 1:

Your organization has decided to eliminate the Sales Manager role entirely.

For instance, if Amelia Burrows's Sales Manager role is deleted, then the Sales Executives Mark Snap and Liz Wiseman must be assigned a new reporting manager. Secondly, Amelia Burrows must be allotted a new role and reporting manager as well.

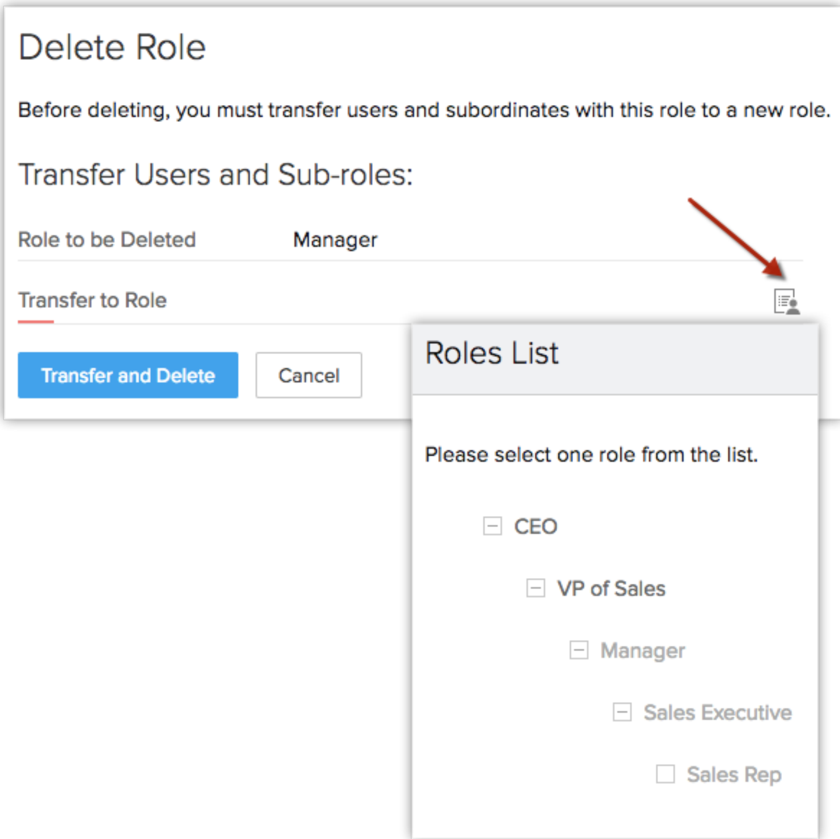
Case 2

If users are transferred to another department or team in the organization, they must be assigned a reporting manager from the new team.

For example, Fiona Williams is a product executive for EMEA and is now transferred to the sales team as a sales executive. She must be assigned a new reporting manager from the Sales branch.

To delete and transfer a role

1. Go to Setup > Users and Control > Security Control > Roles.
2. Select the role to be eliminated and click **Delete**.
3. In the *Delete Role* page, under *Transfer Users and Sub-roles* click the role list icon in **Transfer to Role**.
4. Select the role to whom the subordinate users and sub-roles should now report.
5. Click **Transfer and Delete**.

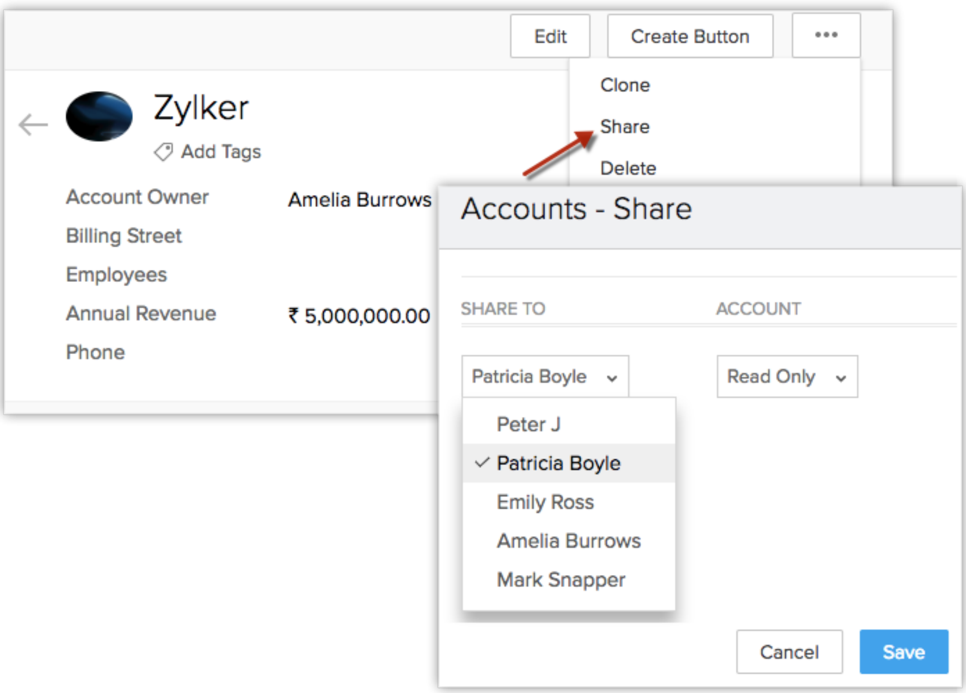


Share Records within the Organization

CRM records can be viewed and accessed only by the record owners and the superio's in the same branch. A reporting hierarchy allows you to choose members from other branches with whom you want to share your data. You can set the permission rights as read/write or read-only.

To share records

1. Select a *Module* and click on the record you want to share.
2. Click the *More* button and select **Share**.
3. In the pop-up, in **Share to** select the users with whom you want to share the data from the drop-down list.
4. Choose the permission level **Read Only or Read/Write** from the drop-down list.
5. Click **Save**.



How Reporting Hierarchy Changes Associated CRM Functions

In business, there are innumerable occasions where a superior's approval is required before finalizing an activity. Zoho CRM has enabled you to redirect such activities to a record owner's superior. In the reporting hierarchy, you can choose a record owner's reporting manager to perform these actions. Listed below are few instances where a reporting hierarchy brings significant changes:

Approval Flow

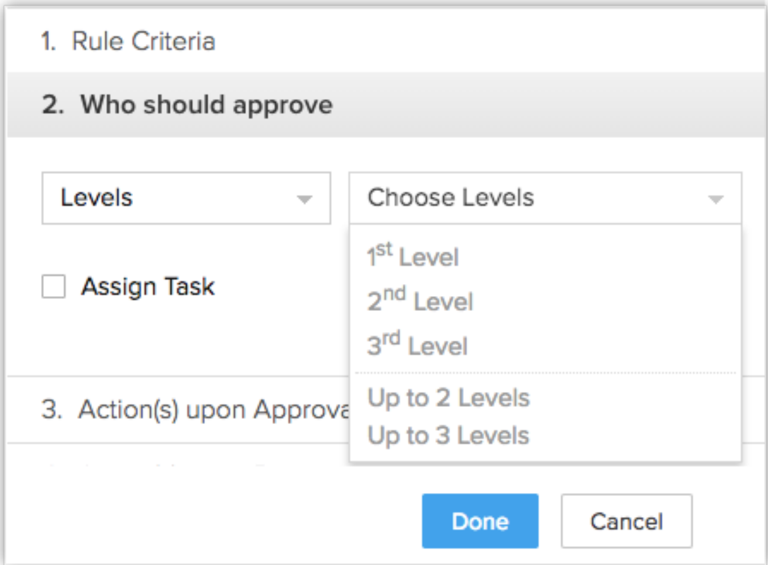
In business, there are many instances where a task needs a superior's approval before proceeding. For example, a sales rep offering a product discount or deciding to initiate a campaign may require approval from the sales manager. A reporting hierarchy allows you to assign the user's reporting manager as the approver for these kinds of activities.

To select the reporting manager as approver

1. Go to Setup > Automation > Approval Process.
2. Click Add Rule to this Process.
3. Select *Rule Criteria* from the drop-down list.
4. In **Who Should Approve**, select *Reporting Manager*.
5. Click **Done**.

Notes:

- While setting up *Who Should Approve*, you can select Levels to define whether the task has to be approved at the 1st, 2nd, or 3rd level of the hierarchy. You can also choose if all members up to the 2nd or 3rd levels of the hierarchy are required for approval.



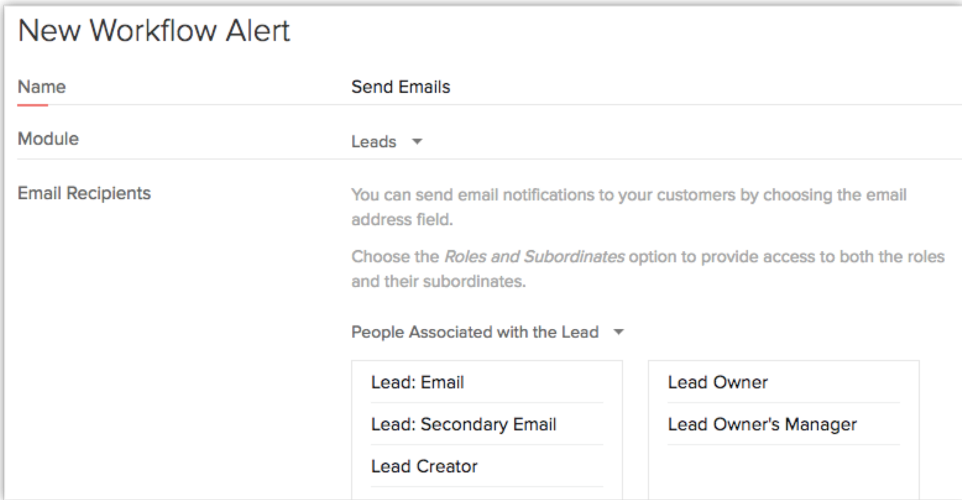
Send Alert

Zoho CRM lets you create sets of actions that help you automate sales and marketing activities. You can associate these actions with workflow rules, blueprints, and approval processes. One of the actions that can be directly associated with the reporting hierarchy is sending alerts. You can associate an alert with a workflow rule, so that the selected email is automatically sent to the recipients when the rule is triggered. In the reporting hierarchy, you can choose a record owner's reporting manager as one of the email recipients.

To send alerts to a reporting manager

1. Go to Automation > Workflow Rules and click on a Rule.
2. In *Instant Actions*, click **Send Email**.
3. In the *Send Alert* page, select **Record Owner's Manager**.

4. Click Save and Associate.



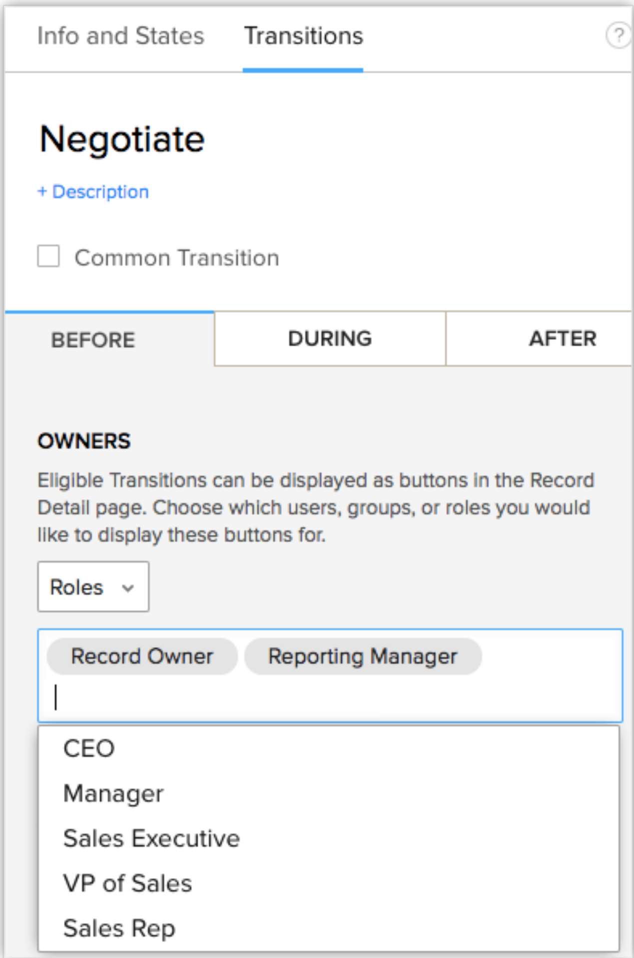
Transition in Blueprint

A blueprint in Zoho CRM creates an online replica of your business process that helps you keep track of your business at different stages, which are called states.A link between two states, called a transition, is displayed in a record's detail page, with a list of actions necessary to complete the transition. Using a reporting hierarchy, you can designate a record owner's reporting manager to execute the actions and complete the transition process.

To assign the reporting manager as transition owner

1. Go to Setup > Automation > Blueprint and click on a Blueprint.
2. In *Transitions*, select **Roles under Owners**.
3. Select Record Owner and Reporting Manager.

4. Click **Save**.

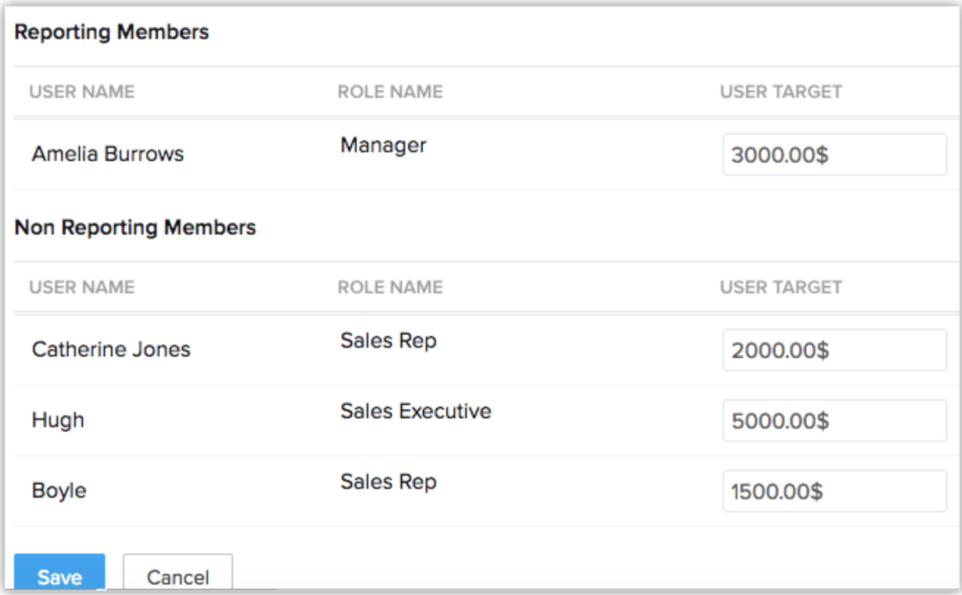


Forecasts

Forecasts enable you to track and fine-tune the sales process. They give a bird's-eye view of the sales pipeline and allow you to track your sales team's performance. In a reporting hierarchy, a user's reporting manager can be enabled to set forecasts for their reporting users. A user's reporting manager can set sales targets for the users and evaluate their team's performance.

To set targets in forecasts

1. Go to the Forecasts module > Create Forecast.
2. Set targets for reporting and non-reporting members.
3. Click **Save**.



Reporting Members

USER NAME	ROLE NAME	USER TARGET
Amelia Burrows	Manager	3000.00$

Non Reporting Members

USER NAME	ROLE NAME	USER TARGET
Catherine Jones	Sales Rep	2000.00$
Hugh	Sales Executive	5000.00$
Boyle	Sales Rep	1500.00$

Notes:

- By default, a non-reporting user's forecast manager will be the CEO or the administrator.
- A CEO will be able to view and edit the entire organization's forecast. If your company has more than one CEO, then they will be entitled to do the same.