



# Canvas

for

**ZOHO CRM**



## A Comparison Guide

## Canvas for Zoho CRM — An Overview

Canvas is a powerful design platform that aims to transform your Zoho CRM user experience, from a visual as well as functional perspective.

As a simple user interface management platform built right into the native CRM system, Canvas is applicable in multiple areas of the CRM. You can customize the UI of the following CRM pages using Canvas:

1. Module List View Page
2. Record Detail Page
3. Portal Detail Page

This way, you can create a unified user experience at multiple engagement points across platforms — internal CRM, self-service customer or partner portals. As a result, whether it's your customers, partners or employees, each of these groups will work with a consistent UI in terms of page design, look and feel — yet the data organized in each of their layouts can be customized based on their functions and requirements.

Consider the example of a real estate company called Zylker Realtors. They could use the power of Canvas to customize their CRM extensively, and create bespoke design for internal employees via the record detail page and list view page. They can also customize the user experience for their customers and partners via the portal detail page. This scenario is elaborated further below.



## Canvas for List View Page

The default list view of a module presents the list of records in a conventional style of rows and columns. While this is functional, sometimes it's a hassle because, when you want to display a handful of information, the only possibility of customization is the addition or removal of columns. It could be tedious to quickly find the information you are looking for.

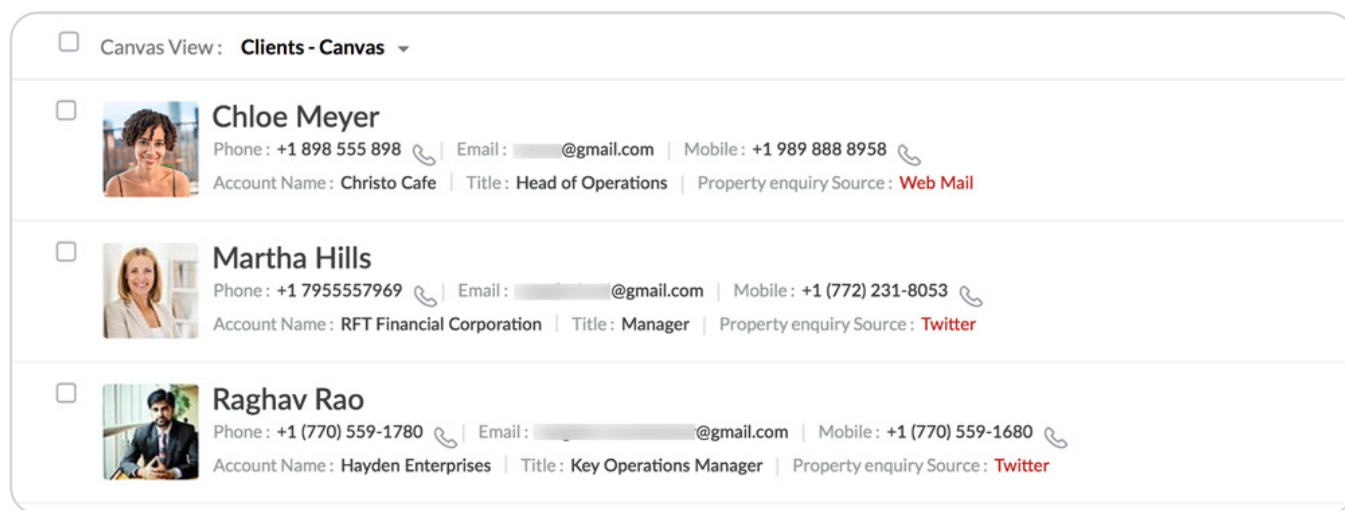
For instance, let's say you are browsing through a list of customers to follow up with. Here, you want to immediately prioritize customers who have come in through the lead source "Twitter". To know how the customers entered the system, you need to find the value of Lead Source field for every record.

<input type="checkbox"/>	Client Name	All ▾	Account Name	Email	Property enquiry:
<input type="checkbox"/>	<input checked="" type="checkbox"/> SEP 12	Martha Hills	RFT Financial Corporation	██████████@gmail.com	Twitter
<input type="checkbox"/>	<input checked="" type="checkbox"/> AUG 26	Raghav Rao	Hayden Enterprises	██████████@gma il.com	Twitter
<input type="checkbox"/>	<input checked="" type="checkbox"/> JUL 31	Chloe Meyer	Christo Cafe	██████████@gmail.com	Web Mail

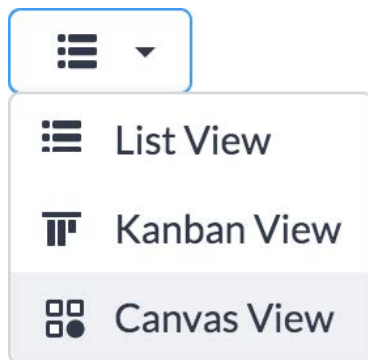
To do this from the default list view, you either have to customize the columns to add the Lead source field, and then scroll through the records to see the value of lead source, or you have to run a filter to fetch a list of leads from Twitter.

Either way there are additional time-consuming steps involved to just find a small piece of information. Instead of these hassles, what if you are able to identify records from Twitter the moment you land on the list view page? That’s exactly what Canvas lets you achieve.

With the Canvas editor available for the list view page, you can design how each row should appear, make them look more attractive, customize the fields you want to see upfront without having to go into the detail page for little pieces of information. This way, the details are pleasant on eye, you can save browsing time and additional clicks and overall have a much better experience navigating through the details.



In this example, you now have the pieces of information on each record arranged neatly and you also have a red highlight on the enquiry source, which makes it easier for you to zero in on the Twitter-based contacts quickly.



### To create a Canvas View for the list view page,

1. Go to the desired module.
2. Click the Views dropdown list.
3. Select Canvas View

The Canvas Builder for the list view page opens up and offers you an array of options to choose from. You can drag and drop the fields you need on each record, customize the styles, size, shape and placement of the fields and create your own unique view that works for your organization's needs.

The screenshot shows the 'Clients - Canvas' interface. On the left, there is a search bar and a list of fields to be added to the canvas: 'Modified Time', 'Other City', 'Other Country', 'Other Phone', 'Other State', 'Other Street', 'Other Zip', and 'Property Type Interested In'. The main canvas area displays a client profile for 'Martha Hills'. The profile includes a profile picture, name, phone number (+1 7955557969), email (vaagdeviravi@gmail.com), mobile number (+1 (772) 231-8053), account name (RFT Financial Corporation), title (Manager), and property enquiry source (Twitter). A 'Sub-category: Bank building' tag is visible. At the bottom of the canvas, there is a styling toolbar with options for font style (14, Regular), font weight (I, ab, AA), background color, text color, spacing, and toggle for label and icon. There are also 'Copy Style' and 'Paste Style' buttons.

To learn more about how to customize your Canvas View for the module list view page, visit this user guide on [Canvas for List Views](#).

## Canvas for Record Detail Page

Zoho CRM comes with a default design to present business data. Every piece of information keyed into the database about a specific entry is stored in its corresponding **“record detail page”**.

While the detail page is indeed informative and functional, it follows a vanilla design to display data, and hence may not meet the dynamic design challenges of thousands of organizations across the application’s user base. While one organization prefers a more formal design, another may opt for something cooler and casual. While one company might want their website theme to reflect on their CRM pages, another might opt for something radically different.

This is where Canvas enters the picture. With Canvas you can customize every visual aspect of your CRM record detail page, including the font, background image, color, size, style and illustrations.

It offers you the tools to build your own detail page from scratch depending on your organization’s design protocol, people, processes and similar factors. You can share your custom designs with relevant teams, thereby creating a fully customized platform that’s attractive, effective and connects with your organization better.

## Standard CRM Record Detail Page (Before Canvas)

**Info**

**Timeline**  
Last Update: a while ago

**RELATED LIST**

- Notes 3
- Properties 4
- Deals 2
- Open Activities 5
- Attachments 6
- Invited Meetings 1
- Quotes 5
- Sales Orders
- Invoices
- Emails 1
- Appointment 1
- Closed Activities 3
- Social

**Mrs. Melinda Anderson - Affinity Estates**

BPdone

**Title:** Strategy Associate **Best time to Call:** Today  
**No best time for the day**

**Email:** melindanderson@affinityest.com

**Phone:** (202) 416-1631

**Contact Owner:** Dusan Messi

**Description:** From Partner Cole Friedman.

**Territories:** Manager Assign

**DEALS**

South Deal	\$216,700.00	SEP 10	Site visit
Proposal/Price Quote		SEP 12	Site Demo

**NEXT ACTION**

## CRM Record Detail Page After Canvas

**Melinda Anderson**  
Strategy Associate

Send Email Edit

**Overview** Notes Timeline Emails Social Closed Activities All Fields

**About**

Account Name	Affinity Estates
Department	Planning and Management
Email	melindanderson@affinityest.com
Phone	(202) 416-1631
Mobile	(202) 505-6757
Lead Source	Partner
Contact Owner	Dusan Messi
Last Activity Time	10/27/2020 06:49 PM

**Properties**

Property Name	Builder Name	Project Status	Base Price per Sq.ft
<b>GOLDEN EAGLE COTTAGE</b> Individual house	<b>Eagle</b>	<b>Completed</b>	<b>\$ 92.00</b>
<b>AZURE CRESCENT VILLA</b> Villa	<b>Crescent</b>	<b>Construction</b>	<b>\$ 180.00</b>
<b>BLITHE AUTUMN</b> Apartments	<b>Autumn</b>	<b>Completed</b>	<b>\$ 110.00</b>

< 1 to 4 >

**Open Activities**

SITE DEMO	Tasks
Activity Type	Tasks
Status	Not Started
Due Date	09/13/2020

**Deals**

SOUTH DEAL	\$216,700.00
Amount	\$216,700.00
Stage	Proposal/Price Quote
Probability(%)	62

**Invited Meetings**

NEGOTIATION 3	Dusan Messi
Host	Dusan Messi
Status	Not Started
From	09/09/2020 09:00 PM

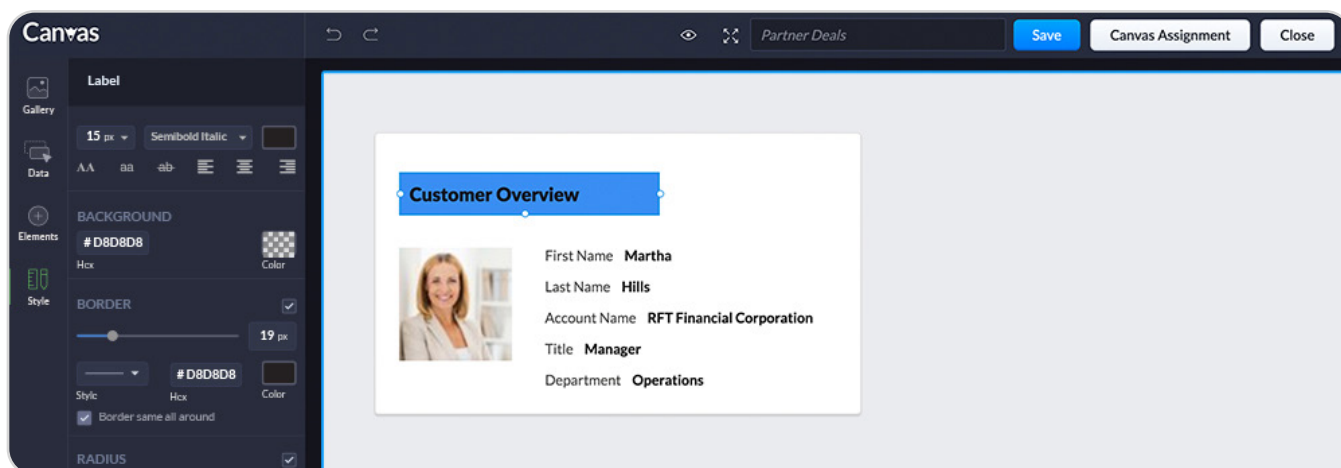
The benefits of customizing your detail page using Canvas include, but are not limited to, the following:

1. Data reorganization
2. Bespoke design
3. Profile-based customization
4. Conditional styling and visibility
5. Better CRM adoption
6. Increased process efficiency and
7. Unified CRM User experience

## To create a Canvas View for the record detail page,

1. Go to the **Setup > Customization > Canvas Builder**.
2. Click **Create Record Detail Page**.
3. Select the desired module and layout and click **Create**.
4. If you wish to start building over a pre-designed template, select a template and start mapping your fields and altering design elements. If you wish to start from scratch, select **Blank Template**.

This is the empty Canvas Builder on which you can build your own unique record detail page.





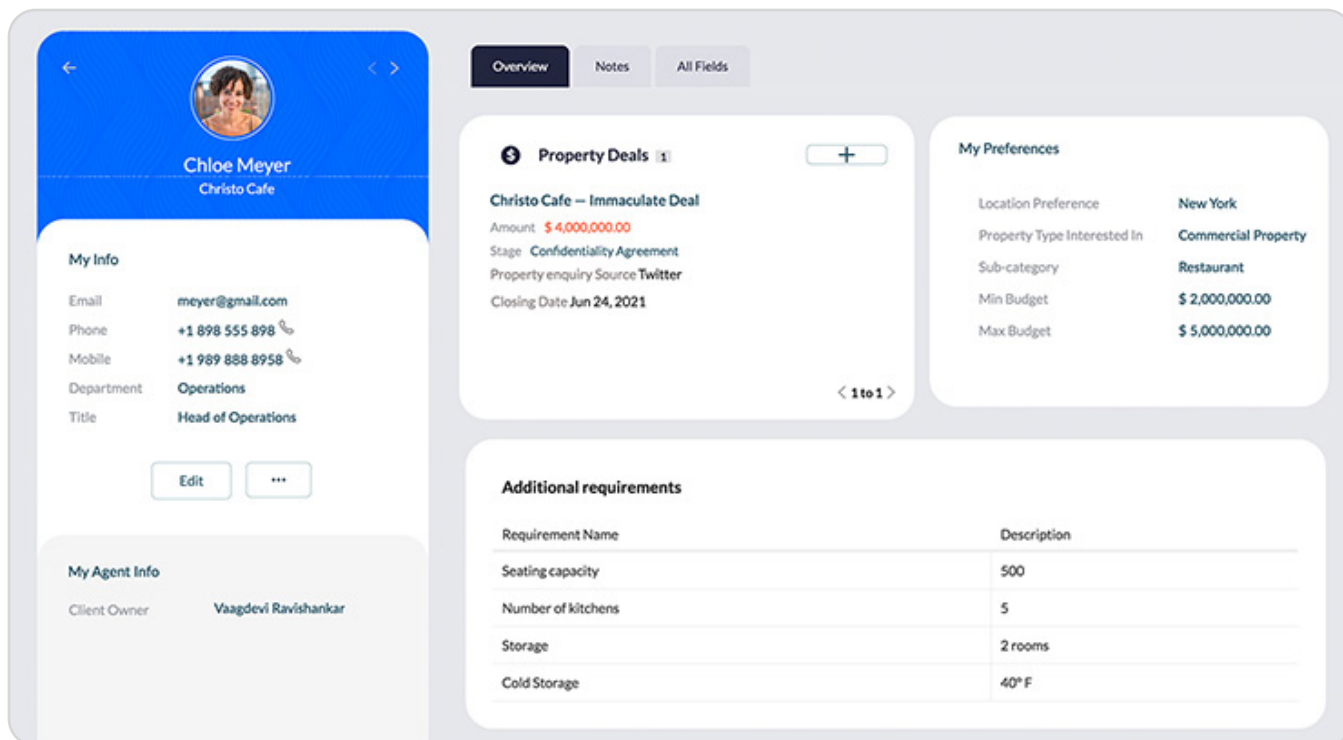
To learn more about building your own record detail page with Canvas, explore possibilities and manage the user experience of your employees, visit this user guide on [detail page customization using Canvas](#).



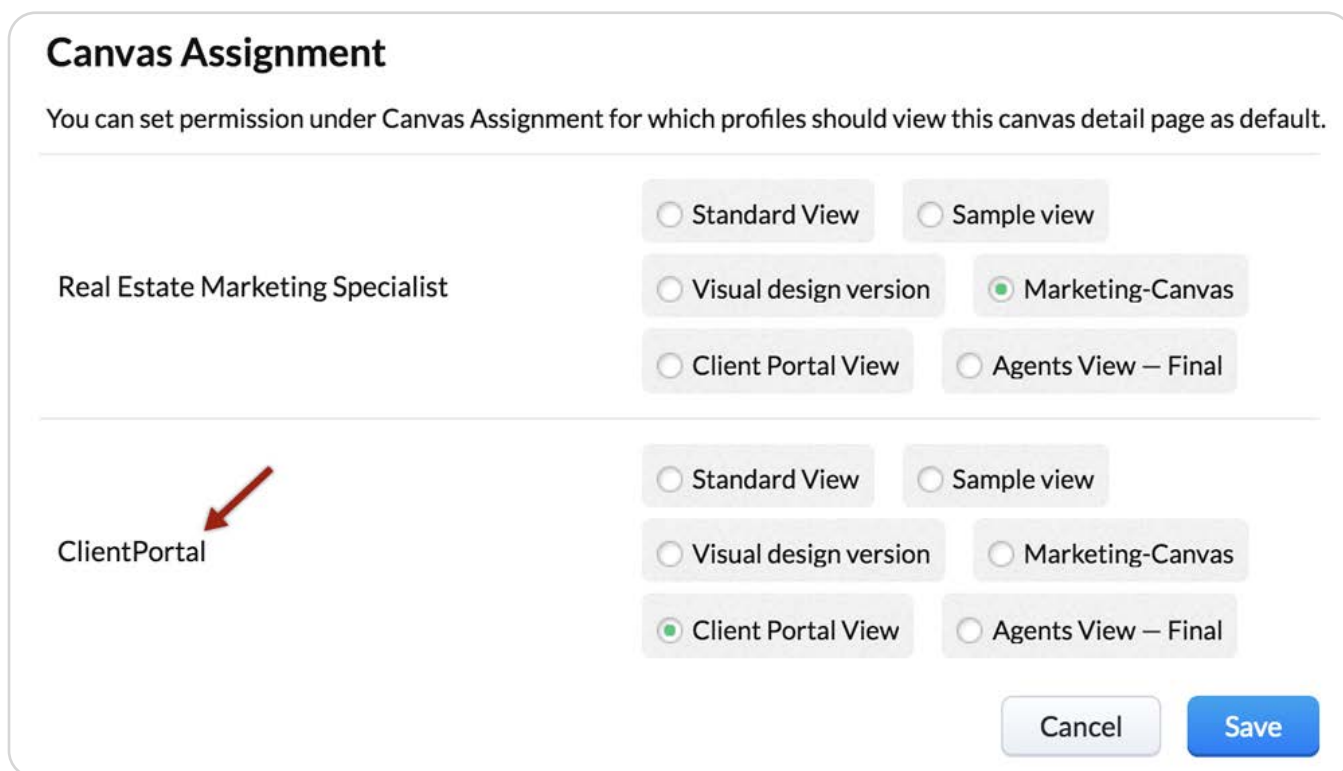
## Canvas for Portal Detail Page

Zoho CRM offers a facility by which you can enable self-service portals for your customers, vendors and partners. The records within the portal account for each customer have a standard view that is similar to the CRM record detail page. This view can be customized with Canvas so that you also define the unique user experience for portal users. When customers log into your self-service portal, they can view their details organized neatly, designed in pleasing colors reflecting the organization's brand. It's also going to be easy for the customer to find what they need and modify what they require easily.

For instance, what was represented as "Client Info" in the record detail page within CRM, can be represented as "My Info" to suit the point of view of the client when they log into their portal. Similarly data organization and design can be done on this portal view to suit the needs and functions of the customers/vendors/partners.



This way an organization can achieve context-based customization across internal teams as well as customers alike. All you need to do apply the Canvas design on the portal detail page is to create a customized detail page and simply assign it to the Client Portal profile under the Canvas Assignment section.



The permissions applicable for the portal user, the modules they can see, the records they can view and edit can all be controlled by the CRM Admin. The portal user will not have any configuration privileges, however, they can edit their own information if they have been given the right access permissions.

To learn more about building your own record detail page with Canvas, explore possibilities and manage the user experience of your employees, visit this user guide on [portal page customization using Canvas](#).

# Canvas

Our Masterstroke, Your Masterpiece.

 Zoho CRM

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