

Organization Settings

MODULE 2



Course for Administrators

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Overview

By setting up a Zoho CRM account for your organization, you are just stepping into your role as a Zoho administrator. You need to perform some tasks on a daily basis to ensure that Zoho CRM meets the business requirements of your organization. These tasks can include the configuration of various entities in Zoho CRM, or they can be associated with the monitoring of other users' tasks. With a proper understanding of the entire set of tasks that you may need to perform as a Zoho CRM administrator, you will be able to perform your role better and ensure that Zoho CRM results in the growth of your organization's business

Begin Your Journey With Zoho CRM

Whether you are a new Zoho CRM system administrator or have been managing Zoho CRM for some time, you must have realized that a big part of your job is receiving and acting on requests from management or other Zoho CRM users to modify the system to meet the requirements of the users and the company. As an administrator, you must be using a few standard functionalities in CRM to begin this initial setup.

Let us dive into these functionalities with greater detail in this module.

Lesson A:

Company Settings

Lesson Objectives

In this lesson, you will:

- Add company details.
- Upload company logo
- Assign a Super Administrator.

Set up Company Details

Certain details help distinguish one organization from another. Zoho CRM recommends that users with Administrator privileges customize these company-specific details, so that all users under an organization-specific account will have these common features.

- **Company Logo** - Upload a personalized company logo that will appear for all users within your CRM account. For best results, the logo dimensions should be 190 pixels wide by 65 pixels high. The logo file format should be .jpg, .png, or .gif and the image file size should not exceed 20 KB.
- **Locale Information** - Define the currency locale and common time zone for your organization. By default, the currency is set to US dollars (\$). Based on the country locale you choose, the currency value will be updated for Quotes, Invoices, Campaigns, and other billing-related fields.
- **Assign Super Administrator** - The Super Administrator is the single point of contact for all communications regarding the transactions and bills from Zoho CRM. Only an active user with the default Administrator profile in Zoho CRM can be selected as the super administrator in an organization.

To change company details

1. Click Setup > General > Company Details.
2. In the *Company Details* page, click **Upload your logo** link.
3. Browse and upload your company's logo.
The logo file format should be .jpg, .png, or .gif.
4. In the *Company Details* page, click the **Edit** icon.
5. Add details like company name, employee count, website, phone number, fax, etc.
6. Select a user as the **Super Administrator**.
Only the active users with the default Administrator profile in Zoho CRM can be selected as the Super Administrator in an organization.
7. Under *Locale Information*, click the **Edit** icon.

8. Select the **Country Locale** and **Time Zone** from the drop-down list.
9. Click **Save**.

Lesson B:

Define Fiscal Year

Lesson Objectives

In this lesson, you will:

- Define company's fiscal year.

Define Fiscal Year

The fiscal year setting helps organizations to configure their fiscal cycle based on the selected start month. Once the fiscal start month is selected, fiscal quarters are automatically determined. By default, Zoho CRM's fiscal start month is set to January. The fiscal year name is based on the start or the end month.

To define fiscal year

1. Click Setup > General > Company Details > Fiscal Year.
2. In the *Fiscal Year* page, choose the **Fiscal Start Month** from the drop-down list.
3. Choose **Start Month** or **End Month** to specify if the fiscal year name should be based on the start or the end month.
4. Click **Save**.

Lesson C:

Set up Organization's Business Hours and Shifts

Lesson Objectives

In this lesson, you will:

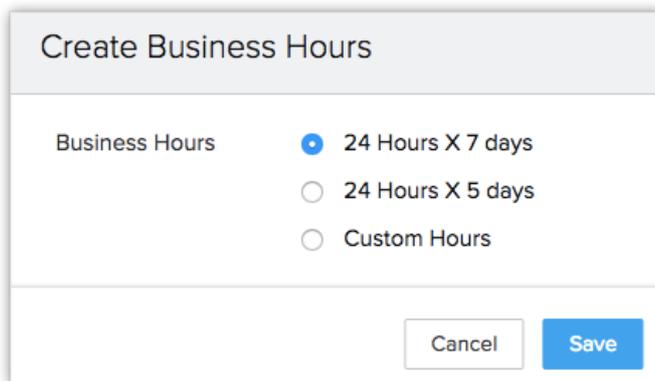
- Define business hours
- Add and assign shift hours

Set up Organization's Business Hours and Shift Hours

Business Hour defines the working hours of an organization and is typically based on the company's location. The time zone settings can be modified to either 24x7 or 24x5 based on the organization's needs. Additionally, if your company follows different timings each day, you can customize the work hours and also specify weekends as per your requirement. Secondly, this setting is also useful for defining the work hours of teams that are based in different time zones.

To set business hours

1. Go to Setup > Company Details > Business Hours.
2. In the *Business Hours* page, click **Create Business Hour**.
3. Select a *Business Hour* from the following list.
 - a) **24 Hours x 7 Days** - Select this option if your company operates 24/7.
 - b) **24 Hours x 5 Days** - Select this option if your company operates 24/5.



The screenshot shows a modal dialog box titled "Create Business Hours". It contains a section labeled "Business Hours" with three radio button options: "24 Hours X 7 days" (selected), "24 Hours X 5 days", and "Custom Hours". At the bottom of the dialog, there are two buttons: "Cancel" and "Save".

- c) **Custom Hours** - Select this option if you want to customize the business days or hours.
4. **Same hours every day** - Select this option if the business hours of the organization is the same everyday and choose the timings from the drop-down list.

5. **Different hours every day**- Select this option if the business hours of the organization vary each day and choose the timings from the drop-down list.

The screenshot shows two overlapping panels of the Business Hours configuration interface. The left panel shows the 'Business Timing' section with 'Different hours every day' selected and 'Business Days' checked for Monday through Friday. The right panel shows the 'Business Timing' section with 'Different hours every day' selected and a table of business days with their respective hours.

Business Days	Start Time	End Time
Monday	09:00 AM	05:00 PM
Tuesday	09:30 AM	07:00 PM
Wednesday	10:00 AM	05:30 PM
Thursday	10:00 AM	06:30 PM
Friday	09:30 AM	05:30 PM

6. Click **Save**.

To create shifts

1. Go to Setup> Company Details > Business Hours.
2. Click **Create Shift** Hours.
3. In the *Create Shift Hours* page, enter the **Shift name**.
4. Select the time zone from the drop-down list.
5. Choose one of the following for **Shift Hours**:
 - a) **Same Hours Everyday** - Select this option if the shift hour is the same everyday and choose the timings from the drop-down list.
 - b) **Different Hours Everyday** - Select this option if the shift hour varies each day and choose the timings from the drop-down list.
6. Click **Save**.

To assign shifts

1. Go to Setup> Company Details > Business Hours.
2. In the *Create Shift Hours* page, select a shift hour that your created, from the list and edit it.
3. Select the users from the **Assign To** drop-down list.

4. Click **Done** and then **Save**.

Create Shift Hours

Shift Name	Canada Shift
Time Zone	(GMT -8:0) Pacific Daylight Time (Canada/Pacific) ▾
Shift Hours	<input checked="" type="radio"/> Same hours every day 11:30 AM to 09:00 PM <input type="radio"/> Different hours every day
Shift Days	<input checked="" type="checkbox"/> Monday <input checked="" type="checkbox"/> Tuesday <input checked="" type="checkbox"/> Wednesday <input checked="" type="checkbox"/> Thursday <input checked="" type="checkbox"/> Friday
Assigned To	 Anderson ▾

Lesson D:

Define Organization's Holidays

Lesson Objectives

In this lesson, you will:

- Add holidays for your organization

Define Organization Holidays

Every organization follows a holiday list to declare the non-working days of the company. Since, the list of holiday typically include the national as well as worldwide holidays it is necessary for the organizations that have global branches to maintain separate holiday list for each location.

To add a holiday list

1. Go to Setup > Company Details > Holidays.
2. In *Holidays Details* page, click **Create Holiday List**.
3. In **Apply To Shift**, select the shift(s) from the drop-down list.
(Note that this option will appear only if you have already created shifts.)
4. Choose the **Year** from the drop-down list.
5. Enter **Holiday Name** and select the **Date** from the calendar.
6. Click the *Add* icon to add more holidays.
7. Click **Save**.

HOLIDAY NAME	HOLIDAY DATE
New Year	01/01/2018
Good Friday	03/30/2018
Easter Monday	04/02/2018
Victoria Day	05/21/2018

Lesson E:

Manage Multiple Currencies

Lesson Objectives

In this lesson, you will:

- Activate multi-currency
- Add multiple currencies
- Change the exchange rates
- Deactivate a currency

Manage Currencies

Defining your organization's currency lets you track client billing, project costs, payroll amounts, and other transactions. You can accurately estimate the value of opportunities and share insightful reports of transactions in your organization's currency. As an administrator you have to set the corporate currency based on the location of your corporate headquarters. Additionally, you must take note of other crucial points that come into play if your business has a global reach.

For example: A company's headquarters are located in Canada. There are sales and development offices in Canada, Mexico, Japan, China, India, Singapore, and Australia. An office in each country has its own sales manager as well as sales representatives who work for specific regions and report to their respective regional senior sales representatives.

In Canada, the company's CEO and Senior Vice President of sales receive monthly reports from their offices across the world. They run reports in Canadian dollars (the company's home currency) in order to estimate sales profit and loss. The VP of Sales in Asia works from the Japanese office. He consolidates data from offices in China, India, Singapore, and Japan to run a report in Canadian dollars. Similarly, the VPs of Sales in Australia and Mexico collect their own regional data and report it in Canadian Dollars as well.

Glossary of Terms

Home Currency

This is the primary currency that your organization uses for its business. Often this is the currency used to generate annual reports and calculate the company's income. The home currency is most relevant for multinational companies that do business in multiple currencies. For example, a company may have offices in Japan, India, and Spain, but its headquarters office is in the US, so, the company's financial figures are expressed in US Dollars. For this reason, the company's home currency is US dollars.

Active Currency

These are the currencies in which your organization does business. Only active currencies can be entered in opportunities and other items within your company's CRM.

Inactive Currency

These are the currencies that your organization no longer uses. Once deactivated, these currencies will not be deleted. They will still be listed under Currencies.

Exchange Rates

These are the rates at which one currency can be exchanged for another. In your CRM account the exchange rate is used to convert an amount in one currency to the corresponding amount in your organization's home currency.

Record Currency

This is the currency for each record. All the currency values for a record will be based on the selected record currency.

Please review the following notes before you start using the multi-currency feature:

- Only a user with an Administrator profile can activate this feature and add currencies.
- Once activated, this feature cannot be deactivated.
- An administrator can add multiple currencies, but only 10 currencies can be active in the CRM account.
- You cannot use a mass update to change your records' Currency fields.
- The multi-currency feature is not supported in the Forecasts module.

Administrator Functions

Only the users with a Zoho-defined **Administrator** profile can perform the following in their organization's CRM account:

- Activate the multi-currency feature by adding a Home Currency.

- Add multiple currencies that can be used as their records' currencies.
- Edit the various currencies in the organization's CRM account.
- Modify the exchange rates for the currencies.

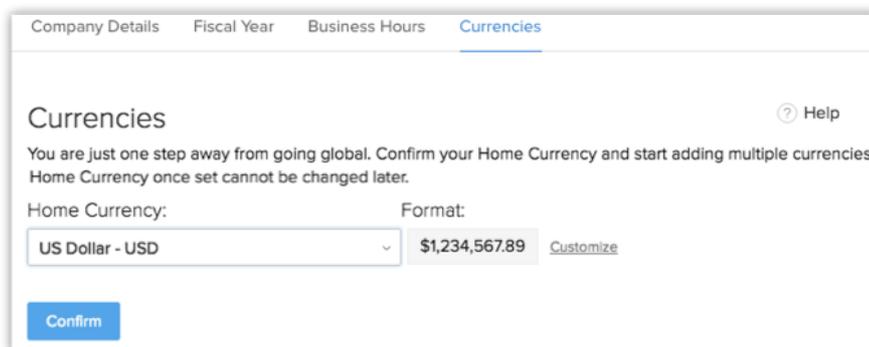
Activate Multi-Currencies & Add Home Currency

A user with an Administrator profile needs to first activate this feature and then add the home currency. Please note that once the Multi-Currency feature is activated, you cannot deactivate it. Once activated:

- The system will take a few minutes (based on the number of records in your account) to apply the home currency as the currency for all the existing records in the CRM account.
- The exchange rates for the existing records will be set as 1.
- An email will be sent to all users with Zoho-defined Administrator profiles.
- The *Currency Locale* field will not be available under the **Setup > General > Company Details** page.

To activate multi-currency & add home currency

1. Go to Setup > General > Company Details.
2. In the *Company Details* page, go to the **Currencies** tab
3. Select the required **Home Currency** from the drop-down list.
Note that the home currency cannot be changed. The format of the selected currency will be shown.



4. Click the **Customize** link to change the following:
 - a. Select the **Thousand Separator** from the drop-down list.

- b. Select the **Decimal Places** from the drop-down list.
 - c. Select the **Decimal Separator** from the drop-down list.
 - d. Click **OK**.
5. Click **Confirm**.

Add Multiple Currencies

After activating the feature by adding the home currency, the administrator can add other currencies that their company uses for business. Other users will then be able to select these currencies to use them as record currency while creating leads, contacts, potentials, etc.

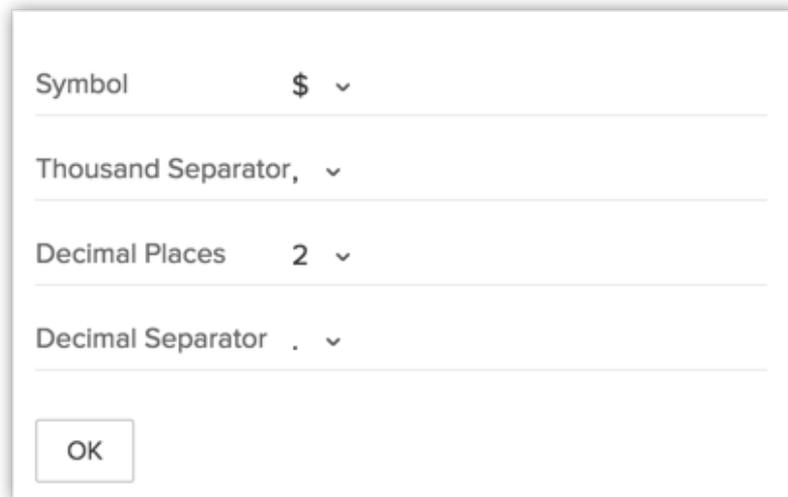
Note:

- The Currency field will not be available if you have only added the home currency. It will be available only if you add another currency, providing multiple currencies to choose from.

To add multiple currencies

1. Go to Setup > General > Currencies > Add Currency.
2. In the *Add Currency* pop-up box, do the following:
 - a. Select a **Currency** from the drop-down list.
This will be set as the home currency. Based on the currency that you select, the currency **Format** will be populated.
 - b. Click the **Customize** link to change the currency format.

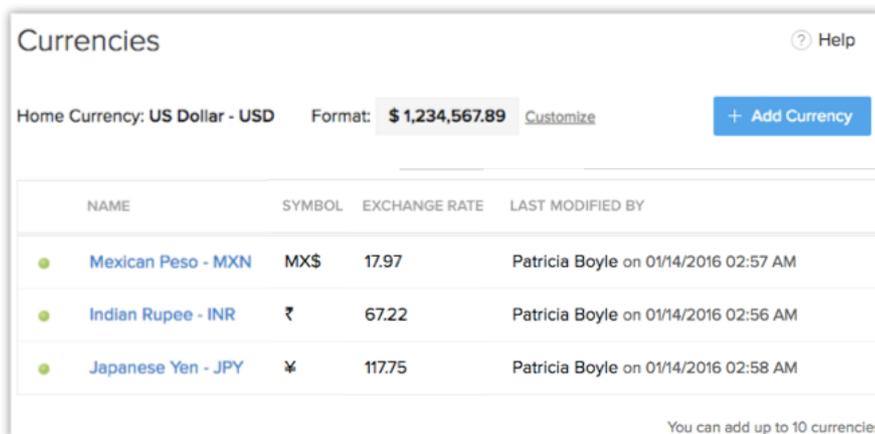
- c. Select the Thousand Separator, Decimal Places, and Decimal Separator.



A dialog box for configuring currency settings. It contains four dropdown menus: 'Symbol' set to '\$', 'Thousand Separator' (empty), 'Decimal Places' set to '2', and 'Decimal Separator' set to '.'. An 'OK' button is located at the bottom left.

- d. Enter the **Exchange Rate** for the currency that you are adding.

3. Click **Save**.



The 'Currencies' management interface shows the home currency as 'US Dollar - USD' and a format of '\$ 1,234,567.89'. A table lists three added currencies: Mexican Peso (MXN), Indian Rupee (INR), and Japanese Yen (JPY). A '+ Add Currency' button is visible in the top right.

NAME	SYMBOL	EXCHANGE RATE	LAST MODIFIED BY
Mexican Peso - MXN	MX\$	17.97	Patricia Boyle on 01/14/2016 02:57 AM
Indian Rupee - INR	₹	67.22	Patricia Boyle on 01/14/2016 02:56 AM
Japanese Yen - JPY	¥	117.75	Patricia Boyle on 01/14/2016 02:58 AM

You can add up to 10 currencies

User Functions

- Specify Record Currency while creating records
- Create quotes and invoices in the currency
- Import records that have value in various currencies

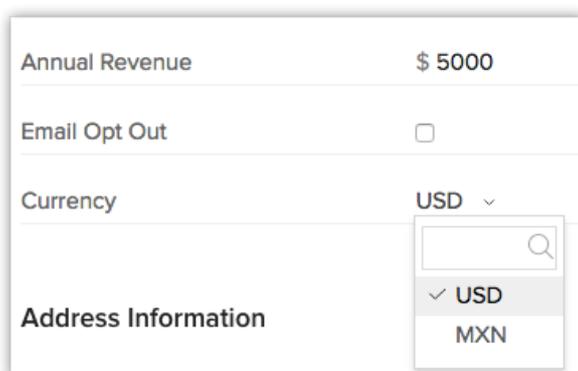
Specify Record's Currency

Records in Zoho CRM will have a Currency field where you can select a currency available in your organization's CRM account. This field will be available only after the multi-currency feature is enabled. All the amount fields in a record will have the

value in the record's currency, followed by the amount in the home currency in parentheses.

To specify a record's currency

1. Click the **[Module]** tab.
2. Click **New [Record]**.
3. In the *New [Record]* page, enter the details and select the record's **Currency** from the drop-down list.
Only active currencies will be listed in the drop-down field.



The screenshot shows a form with several fields. The 'Annual Revenue' field is set to '\$ 5000'. The 'Email Opt Out' field has an unchecked checkbox. The 'Currency' field is a dropdown menu currently showing 'USD' with a downward arrow. A search icon is visible in the top right of the dropdown. Below the dropdown, 'USD' is selected with a checkmark, and 'MXN' is listed as an option. The 'Address Information' field is partially visible at the bottom.

4. Click **Save**.

Change the Exchange Rate

The exchange rate is specified while adding multiple currencies. Each record will have the Zoho defined field named Exchange Rate with the conversion value based on the record currency. This is added to keep a note of the rate of conversion at the time of record creation. When the multi-currency feature is activated, the home currency will be set as the record currency for all the existing records. As a result, the exchange rates for the existing records will be set as 1.

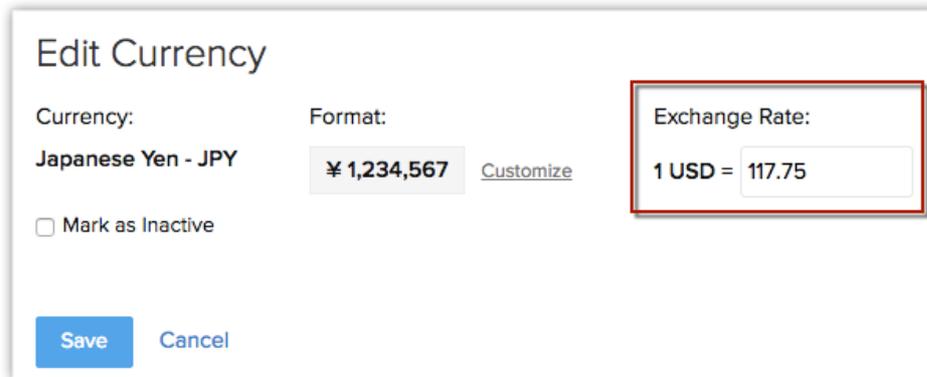
Note:

- Changing the exchange rates will not affect the existing records.

To change exchange rate

1. Go to Setup > Organization Settings > Currencies.

2. Click on the currency for which you want to change the exchange rate.
3. In the *Edit Currency* pop-up box, modify the **Exchange Rate** for the currency.



The screenshot shows the 'Edit Currency' dialog box. It has a title 'Edit Currency'. Under 'Currency:', it says 'Japanese Yen - JPY'. Under 'Format:', it shows '¥ 1,234,567' and a 'Customize' link. Under 'Exchange Rate:', it shows '1 USD = 117.75'. There is a checkbox for 'Mark as Inactive'. At the bottom, there are 'Save' and 'Cancel' buttons.

4. Click **Save**.

How currency is applied throughout CRM.

Quotes, Invoices, Sales Orders, and Purchase Orders

As with any other record, you can also set the Currency field for quotes and invoices. The line items that you select will be in the home currency. They will be converted into the record currency that is selected for the quote or invoice.

Reports

By default, the value in a report will be displayed in the home currency.

Dashboards

Zoho CRM's Dashboard is where you can add pictorial representations of your custom reports, giving a real-time snapshot of your organization's key metrics. It will help you easily visualize the patterns and trends in your sales, marketing, and other functions. Amounts that appear in the dashboard components will be displayed in the home currency.

List Views

The List View filters out and displays records in a module based on criteria you set. For example, you can create a list view to filter for the potentials that are

closing this week. When you specify criteria using a currency field, the value can be specified only in the home currency.

The columns in these list views can be customized to add the currency fields. When you click on the currency column header in a list view, the records with different currencies will be sorted in ascending or descending order based on the home currency value.

Import

In Zoho CRM, you can easily import records with multiple currencies.

- When a record's Currency field is not mapped, the home currency will be set as the currency.
- When a **Record Currency** field is mapped but the value differs between the import file and CRM, the home currency will be set as the currency.

Criteria

You can specify the criteria you want to use in features like List View, Workflow Rules, or Reports. When you are using the multi-currency feature, any criteria that use currency fields can only be set in the home currency.

Find and Merge

When you have two or three similar records with different currencies, you can use the Find and Merge feature to merge the duplicate records. The master record's Exchange Rate and Currency field values will be used, and the corresponding amounts from other records will be converted accordingly, so that they can be merged as one record.

Web Forms

- There are two cases for using the Currency field in your web form:
- You create a web form with the Currency field. The visitor, completing the form, will select the currency and specify the amount, and they will be added in Zoho CRM.
- You create a web form with the Currency field and modify the HTML code to hide the field and provide a single value for the Currency field. For

example, you generate a web form with a hidden field, Currency, whose value is specified as INR. When the form is published and a visitor fills the form, the amount will be automatically recorded as INR and this will be added in Zoho CRM.

If the Currency field is not added in the web form, by default the amount will be recorded in the home currency.

Forecasts

The Multiple Currencies feature is not supported in the Forecast module. Amounts in forecasts will be listed in the home currency.

Lead Conversion

Each lead record will have a record currency in your account. When a lead is converted, an **account**, **contact**, and **potential** are created. These new records will have the converted lead's currency.

Deactivate Currency

When your organization no longer uses a currency for business, then you can deactivate it from your CRM account. On deactivating a currency:

- The currency will not be deleted as you can only deactivate them.
- New records cannot be created using the deactivated currency. However, you may be having existing records that use the deactivated currency.
- The deactivated currency will be available under the list of currencies you have added.

To deactivate currencies

1. Go to Setup > General > Company Details > Currencies.
2. Click on the currency that the organization no longer uses.

3. In the *Edit Currency* pop-up box, select the **Mark as Inactive** check box.

The screenshot shows a dialog box titled "Edit Currency". It has two columns. The left column is labeled "Currency:" and contains the text "Japanese Yen - JPY". Below this is a checkbox labeled "Mark as Inactive", which is highlighted with a red rectangular box. The right column is labeled "Format:" and contains a text box with the value "¥ 1,234,567" and a link labeled "Customize". At the bottom of the dialog box are two buttons: "Save" (in blue) and "Cancel".

4. Click **Save**.

Lesson F:

Set Hierarchy Preference

Lesson Objectives

In this lesson, you will:

- Learn two types of hierarchy structures.
- Understand the benefits of each structure.

Set Hierarchy Preference

Every organization follows a hierarchy structure, ranking its members according to their designations or roles. A similar setup has to be maintained within the CRM account for maintaining a proper data management and handling system. You can choose either the role or reporting hierarchy for your CRM system based on the company's requirement. Let us take a detailed look at both the hierarchy structures to understand which one works best for your organization.

Role hierarchy: This structure allows data accessibility based on one's role or position in the organization. So, users at higher role will be able to view every subordinate's details irrespective of the branch or team they belong to. In other words, it provides complete transparency within the organization. If Adam selects this structure, Joe, Douglas and Rachel will be able to access each others data even though they are not closely related to the branches.

Reporting Hierarchy: This structure ensures that the data accessibility is within the realms of the team. That said, if Adam chooses this structure there are three ways in which the data flow in Zylker will take place:

1. The CFO's of the respective region will be able to view the other branch's data only if it is shared with them. This also applies to other higher positions like, FMs and Advisors. For example, Joe can view Rachel's data only if she enables data sharing with Joe.
2. Any user at the higher role is entitled to be the reporting manager of the user at a subordinate role. For example, Douglas is CFO of Germany branch, however he can still be chosen as the reporting manager for an FM or Advisor working in Japan or Australia branch.
3. If any Advisor/FM/CFO from a particular branch is retained without a reporting manager; their data can be viewed by either Administrator and Super admin or any person above their hierarchy.

To set hierarchy preference

1. Go to Setup > General > Company Details > Hierarchy Preferences..

2. In *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.

