



Create user-friendly,
industry-specific
designs for
Zoho CRM

**A renaissance for
CRM design**



Overview

Improving the quality of User Experience (UX) has been a major focus for CRM vendors over the past few years. That's because, despite the fact it is the fastest-growing business software market, CRM suffers from low adoption and usage. **We've heard from our customers and sales teams alike** that an intuitive, adaptive, and personalized User Interface (UI) can go a long way in enhancing CRM usage.

Today, the average CRM is largely an information repository, with rows of fields, buttons, and filters crammed onto one screen. There's a lack of context and relevance that makes it hard for salespeople to work with a CRM, which can be do much more.

CRM solutions often have a linear design which cannot dynamically adapt to the customers' requirements. This is a problem since different users will work with fundamentally different information. The CRM design needs to adapt to the industry, sales process, business size, and other aspects of the business using vertical solutions, so it can address specific business use cases. However, this kind of customization often needs significant time and energy on the client side.

Our pitch: Canvas is a design studio within Zoho CRM, where customers can redesign the visual interface of Zoho CRM to suit their requirements. For the first time, users can remodel the look and feel of their CRM without writing a single line of code, since it uses a simple drag-and-drop interface. Canvas creations can greatly improve the end user's experience, which helps increase their productivity and morale. Canvas sets the precedent for user experience autonomy, where the user can control the experience they have with the product.



Problem

How can we improve CRM adoption?

Despite being the fastest growing software market right now, CRM solutions suffer from low adoption and usage. More and more businesses are moving their sales processes to a CRM, but [salespeople are not yet fully on board](#). Adoption is one of the biggest challenges that customers are facing, and vendors are experimenting with different ideas to solve this.

This challenge can be attributed to the experience that CRM solutions provide, which is not personal enough for salespeople, limiting the extent that the CRM can boost their productivity. CRMs can also be very complex unless customized extensively, which is often easier said than done. The CRM experience could be so much better.

Look at Instagram, Twitter, or Spotify. Their interfaces are finely tuned by designers and scientists, and are constantly revamped to keep them fresh. These apps are convenient to use, require minimal effort, and have a clean design that the majority of users are comfortable using. These applications don't offer the users a means to personalize the design, [because their designs are great as they are](#).

However, there are also many applications that lose users because of their poor design, because they lack either the focus or the resources required to create a universally appealing design. User interface is a [critical factor in adoption and usage](#), and, since end users cannot alter the software design, the onus for creating a standout user experience falls entirely on the software developers.

1.1 Business software is a little different

When a consumer does not like the user interface of a music player, they'll just switch to one of the many alternatives. That's how the consumer software market works: there are a range of choices with different approaches to UX, thanks to affordable and accessible cloud computing and app development solutions.

However, for business software like CRM, switching to an alternative is not that simple. This process of moving your business's data and processes into a new solution, creating workflows, training users, setting up integrations, and all the other tasks needed to make a CRM work for your business can often take several months.

Enterprise grade, world-class CRM software distinguishes itself based on merits such as functionality, integrations, customer service, and pricing, [but not usually design](#). Vendors don't offer anything that's radically different in terms of design; the user experience is often lackluster, and leaves much to be desired.

It's 2021, and CRM solutions have come a [long way](#), from a simple contact manager to a database, automation, and analytics powerhouse. But the leaps and bounds made on the technological front far exceed the progress made on the user experience front. In recent years, some vendors have been investing more in improving the end user experience, and there have been some great improvements, but not enough to fully resolve the problem.

1.2 Can CRM solutions provide the experience of a consumer app?

No CRM solution is celebrated for providing the rich and fulfilling user experience that consumer apps like Instagram or Spotify provide. It may seem unfair to compare business software with consumer software, but why can't that be our goal? [After all, all progress comes from lofty goals.](#)

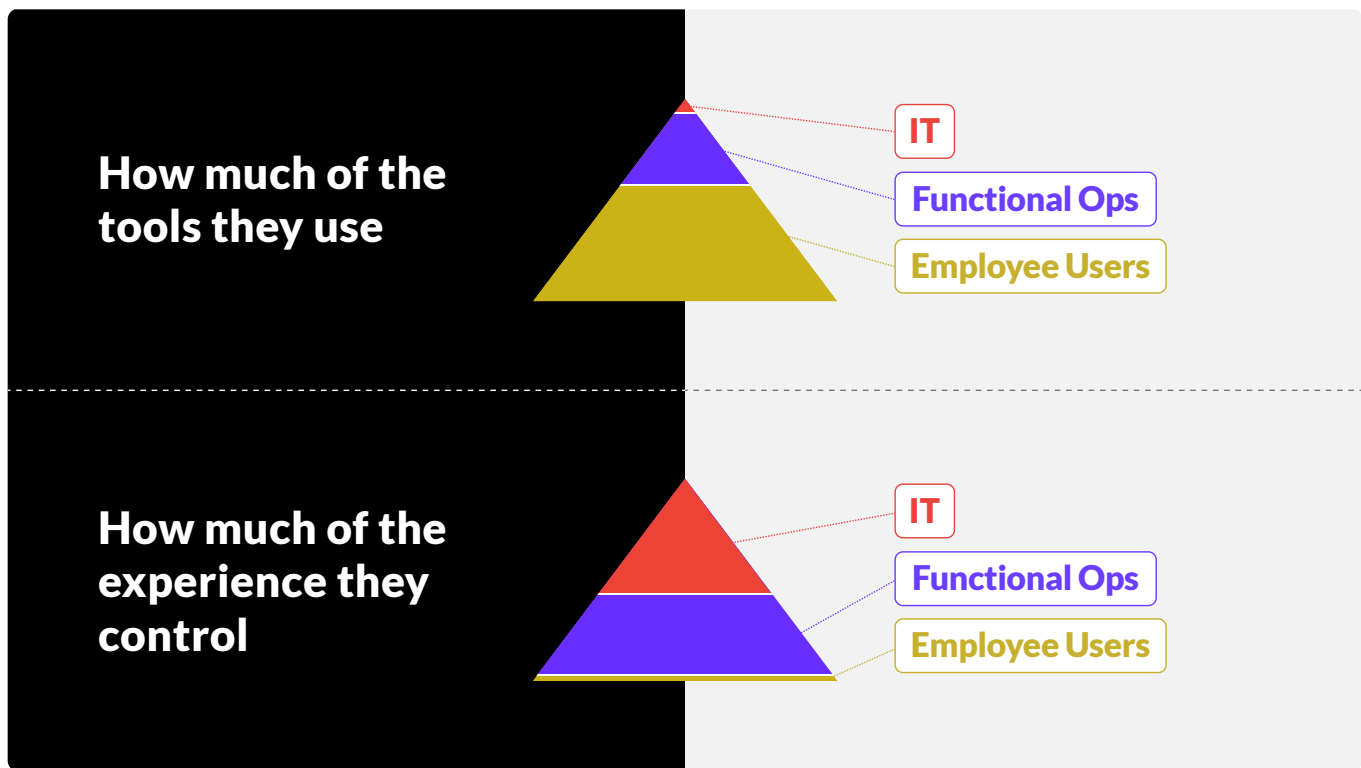
These consumer applications manage to create experiences that CRM solutions cannot, because they have three advantages going for them:

1. Their software is linear enough for a simple interface.
2. The decision makers prioritize design.
3. They involve the end users in the process.

Popular CRMs on the market, such as Zoho CRM, are comprehensive and powerful software solutions, housing large amounts of data, workflows, integrations, analytics, and more. CRM solutions are complex by nature, not like a linear, commercial app. This makes it inherently harder to design a user interface.

Secondly, the people who are making decisions about CRM implementation for a business, like the IT department, are more focused on features and capabilities. They're tasked to find a CRM solution that meets the management's list of requirements, and UX is not always at the top the list.

Thirdly, consumer software vendors involve the end users in the creation process, in a way that CRM vendors don't. They constantly test the user interface and make ongoing changes to keep up with the ever-evolving needs and tastes of the customers. Their success relies on the end users enjoying the product, not on impressing higher-ups in a business who may never use the product, which is the case for CRM vendors.



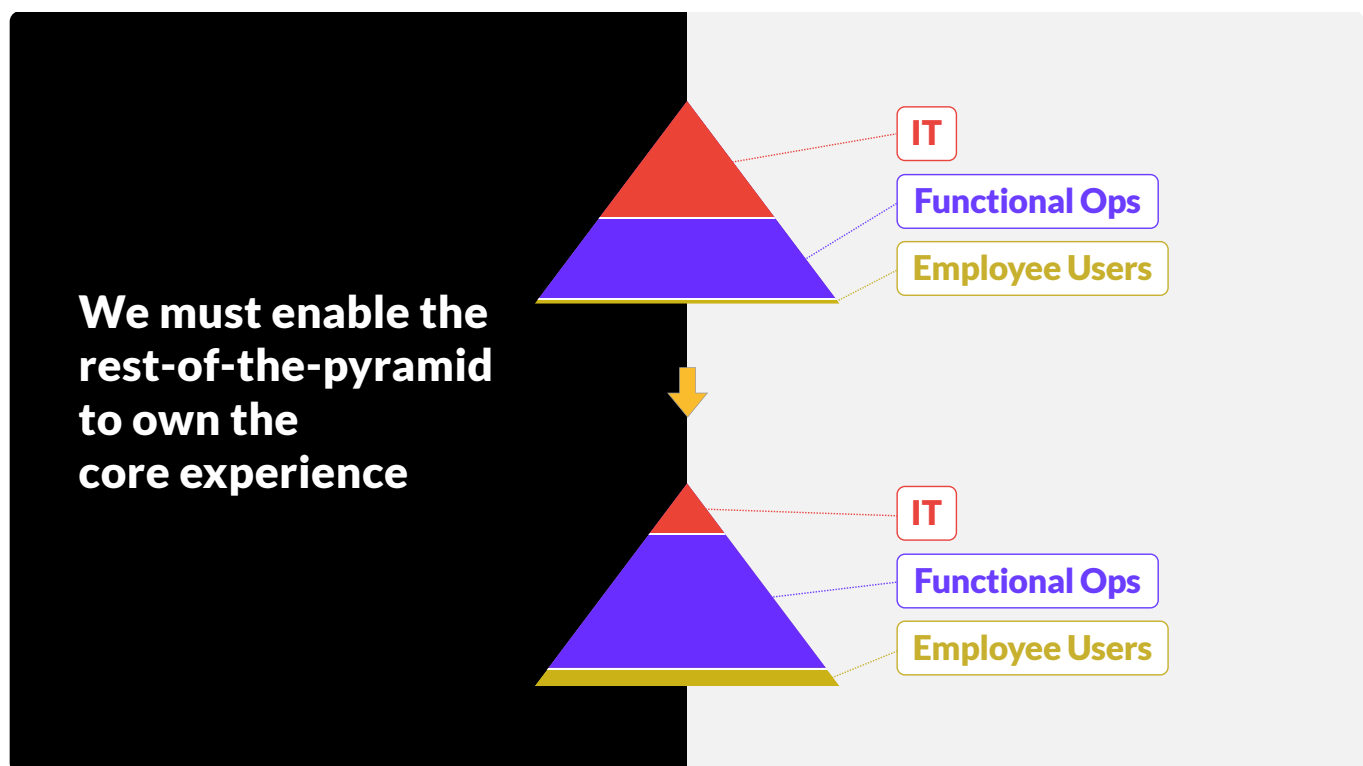
Therefore, vendors are incentivized to invest more in creating a robust, feature-rich, and scalable CRM solution, and less in improving the end user's experience. This has created a vicious cycle, where there's a disconnect between what the end user wants, what the admin wants, and what the vendor makes.

CRM solutions don't have the universal appeal that consumer apps do. However, that's because CRM solutions serve a larger purpose and have more concrete value to a consumer than Spotify or Twitter. Designing a CRM solution that has universal appeal without compromising on the overall purpose it serves for industries, businesses, and users, is a difficult challenge.

1.3 Personalization is not easy

It's not easy to personalize Enterprise CRM solutions to meet the ever-evolving needs, preferences, and methods of all their users. It is not easy to address the vertical needs of different industries in a single solution. For example, a remote sales associate working for an insurance company deals with different data and processes than a sales executive working at a car showroom. How can the same out-of-the-box interface satisfy both of their requirements?

Even within the same industry, different teams work with different methods depending on their target audience, resources, business model, and other factors. Two ecommerce stores, for example, might have very different sales processes, and therefore have different requirements of a CRM.



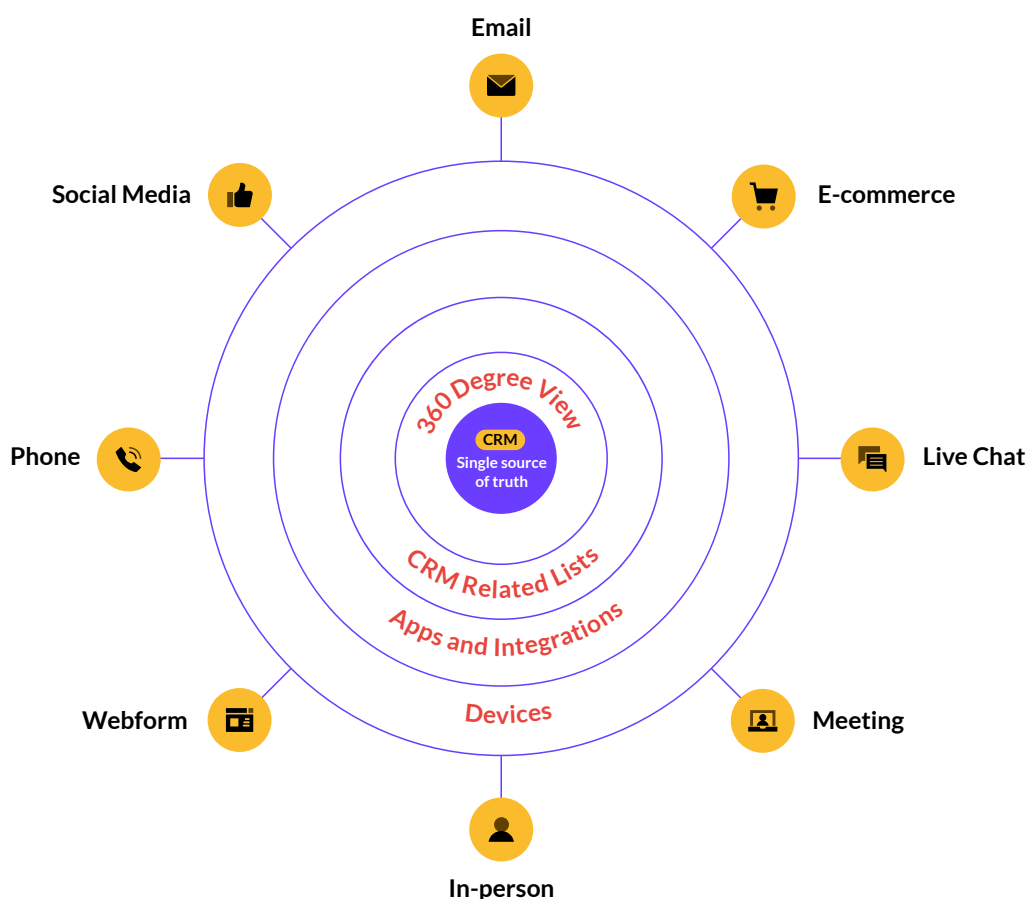
CRM solutions do offer personalization options, but they don't go far enough to meet every company's unique needs and requirements. CRM users want to be able to control the experience they have with the solution, like reducing the time it takes to locate information, reducing clutter on the screen, making the most important information stand out, and controlling more factors that impact productivity.

Individual sales methods rely on how rigid a CRM solution is, which is not ideal for users. Teams should not have to adapt their methods to a rigid CRM software. CRM software should be flexible enough to adapt to a team's method.

1.4 Increasing complexity of customer data

As the number of channels of communication and customer touchpoints have increased, the influx of customer data generated has increased as well. This has created a range of complexities such as the need for a 360-degree view of a customer's journey and a single source of truth for customer data. There is a real need for a simpler approach to organize this data with the right relevance and context, for every business's unique requirements.

Every business uses customer data differently and CRM solutions should be able to adapt to their methods. When left unregulated, large volumes of data can cause complexities to snowball—even a simple look-up to find the zip code of a customer might require multiple steps and scrolling through data, slowing users down and reducing the CRM adoption rate unless resolved.



Snow balling complexity with increased customer data



Solution

Canvas by Zoho CRM

At Zoho CRM, we took it upon ourselves to create a new benchmark for customization. Every industry is unique, so there is no such thing as one-design-fits-all. Companies should be able to modify the design of a CRM to suit their needs after purchase. That's the ideal solution—to let customers control their experience.

That's the idea behind Canvas, our answer to the question, "Why can't CRM software offer a great consumer experience?" We are letting the consumer create their own experience.

2.1 What's Canvas?

Canvas is a design studio built into Zoho CRM, where customers can redesign the user interface from a blank canvas. Canvas supports a range of formatting options that help companies reimagine the look and feel of any module, down to the smallest detail.

This is where data meets design. It's like photoshop for databases, but much more nuanced. Canvas understands how the modules, fields, related lists, and buttons in the interface are created, so it provides a thoughtful, contextual designing experience for the customer.

Canvas is a unique tool offered by Zoho CRM, which no other CRM vendor has attempted to create. We're pioneering the design autonomy movement, allowing customers to curate the user experience they want. With Canvas, Zoho CRM has become the most customizable CRM on the market.

Regular Experience

CRM

Home

Leads

Contacts

Deals

Builders

Properties

Dashboards

Reports

...

Send Email

Edit

Yahoo

...

< >

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

Email

melindanderson@affinityest.com

No best time for the day

Phone

(202) 416-1631

Contact Owner

Dusan Messi

Description

From Partner Cole Friedman.

Territories

Manager Assign

DEALS

South Deal

\$216,700.00

Proposal/Price Quote

NEXT ACTION

SEP 10

Site visit

SEP 12

Site Demo

Canvas Experience

CRM

Home

Leads

Contacts

Deals

Builders

Properties

Dashboards

Reports

...

Send Email

Edit

...

< >

Melinda Anderson

Strategy Associate

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

GOLDEN EAGLE COTTAGE

Individual house

Builder Name

Eagle

Project Status

Completed

Base Price per Sq.ft

\$ 92.00

\$211,600.00

AZURE CRESCENT VILLA

Villa

Builder Name

Crescent

Project Status

Construction

Base Price per Sq.ft

\$ 180.00

\$ 342,000.00

BLITHE AUTUMN

Apartments

Builder Name

Autumn

Project Status

Completed

Base Price per Sq.ft

\$ 110.00

\$ 130,000.00

< 1 to 4 >

Open Activities

SITE DEMO

Activity Type

Tasks

Status

Not Started

Due Date

09/13/2020

Deals

SOUTH DEAL

Amount

\$216,700.00

Stage

Proposal/Price Quote

Probability(%)

62

Invited Meetings

NEGOTIATION 3

Host

Dusan Messi

Status

Not Started

From

09/09/2020 09:00 PM

Create user-friendly, industry-specific designs for Zoho CRM with Canvas.

10

2.2 How Canvas works



Canvas helps companies create a custom view that will be available as an option alongside the default views. Customers can click to create a new Canvas view from a list page or record page, which will open a blank canvas in the powerful editor. Here's what makes Canvas special:

- **The right info in the right place:** Customers can find all the fields, related lists, and buttons in the left-side menu in editor mode. This means no information is lost and all associations remain intact. Canvas simply helps users modify the appearance of Zoho CRM.
- **Drag-and-drop interface:** You don't have to be a programmer or a designer to use Canvas, you just need to have good taste. Canvas comes with a drag-and-drop interface to offer a simplified design experience for everyone. In the editor, users can select components from the left menu, drag them onto the interface, and drop them at the desired location, then click to see the available formatting options. So all it takes is a few clicks to create a new design.

Drag & Drop Editor

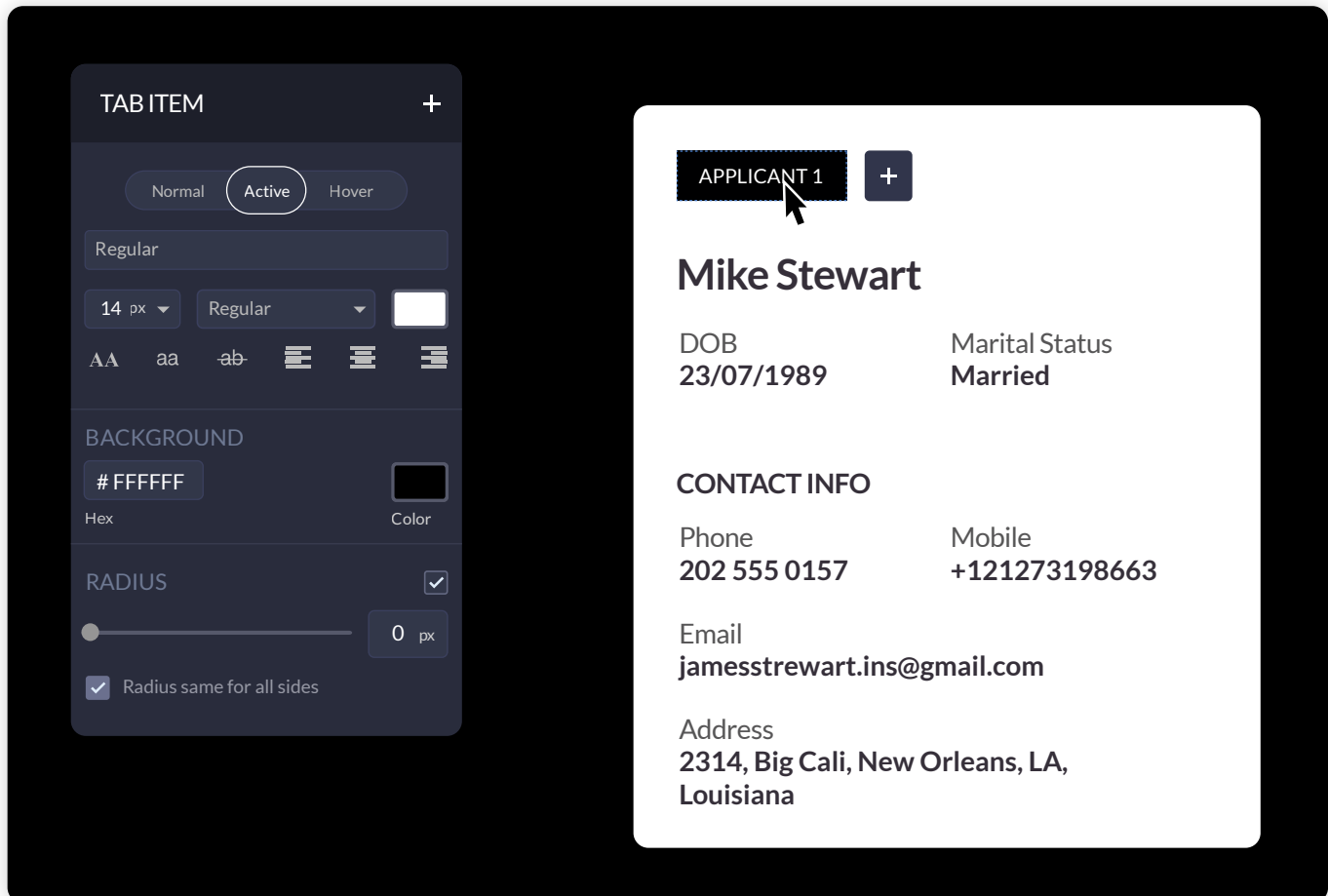
The screenshot displays the Zoho CRM Canvas editor interface. On the left is a dark sidebar with a 'Canvas' header and a search bar. Below the search bar are three sections: 'Gallery' (with icons for Data, Elements, and Style), 'FIELD' (with a dropdown arrow), and a list of fields including 'About this property', 'Amenities', 'Contacts', 'Created By', 'Created Time', 'Currency', 'Property Owner', 'Email Opt Out', 'Ending Sq.ft', 'Ending price', 'Last Activity Time', 'Modified By', 'Modified Time', 'No. of BHK', 'Project Ending Date', 'Project Starting Date', and 'Property Code'. The main canvas area shows a custom record page for 'Melinda Anderson', a 'Strategy Associate'. The page has a dark blue header with a profile picture and a navigation bar with tabs: 'Overview' (selected), 'Notes', 'Timeline', 'Emails', 'Social', 'All Fields', and 'Closed Activities'. The 'Overview' tab displays two sections: 'About' and 'Properties'. The 'About' section shows details for 'Affinity Estates', including account name, department, email, phone, mobile, lead source, contact owner, and last activity time. The 'Properties' section shows two property listings: 'GOLDEN EAGLE COTTAGE' (Individual house) and 'BLUE CRESCENT VILLA' (Villa), each with builder name, project status, and base price per Sq.ft.

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	
 GOLDEN EAGLE COTTAGE Individual house Builder Name Eagle Project Status Completed Base Price per Sq.ft \$ 92.00 \$211,600.00	 BLUE CRESCENT VILLA Villa Builder Name Crescent Project Status Construction Base Price per Sq.ft \$180.00 \$342,000.00

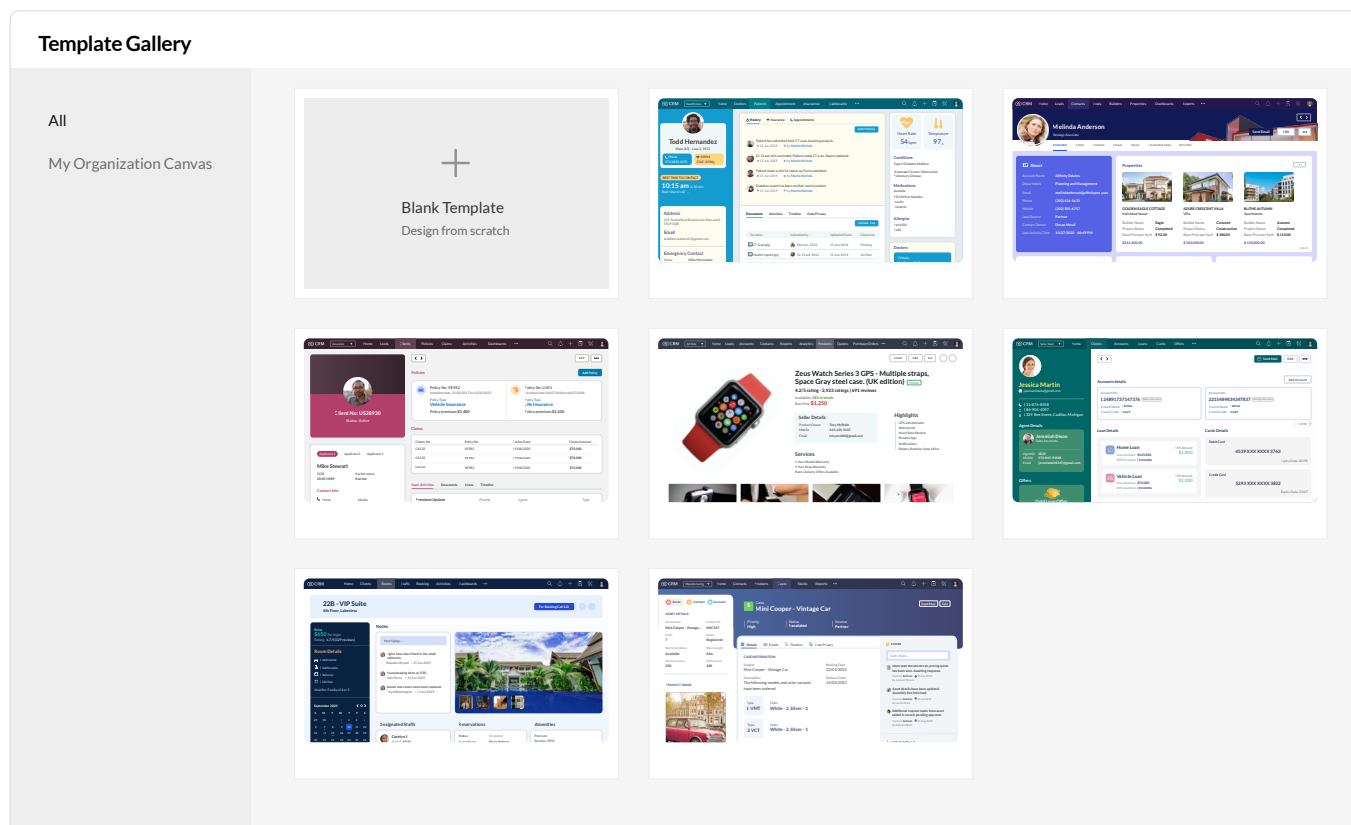
- **Wide range of formatting options:** Canvas offers a wide range of formatting options to play around with, so that companies can find the style that fits their team best. From changing the shape of the contact image or the color of a button, to adjusting the padding, the width, or the shadows of a field, Canvas helps users ensure that every detail is perfect for a truly personal view.

Formatting options



- **Templates:** Canvas comes with a set of templates that customers can choose if they want a head start with their design, or if they're looking for inspiration. There are templates tailored to a number of industries, and they can be easily modified to better suit the customer.

Default Canvas Templates

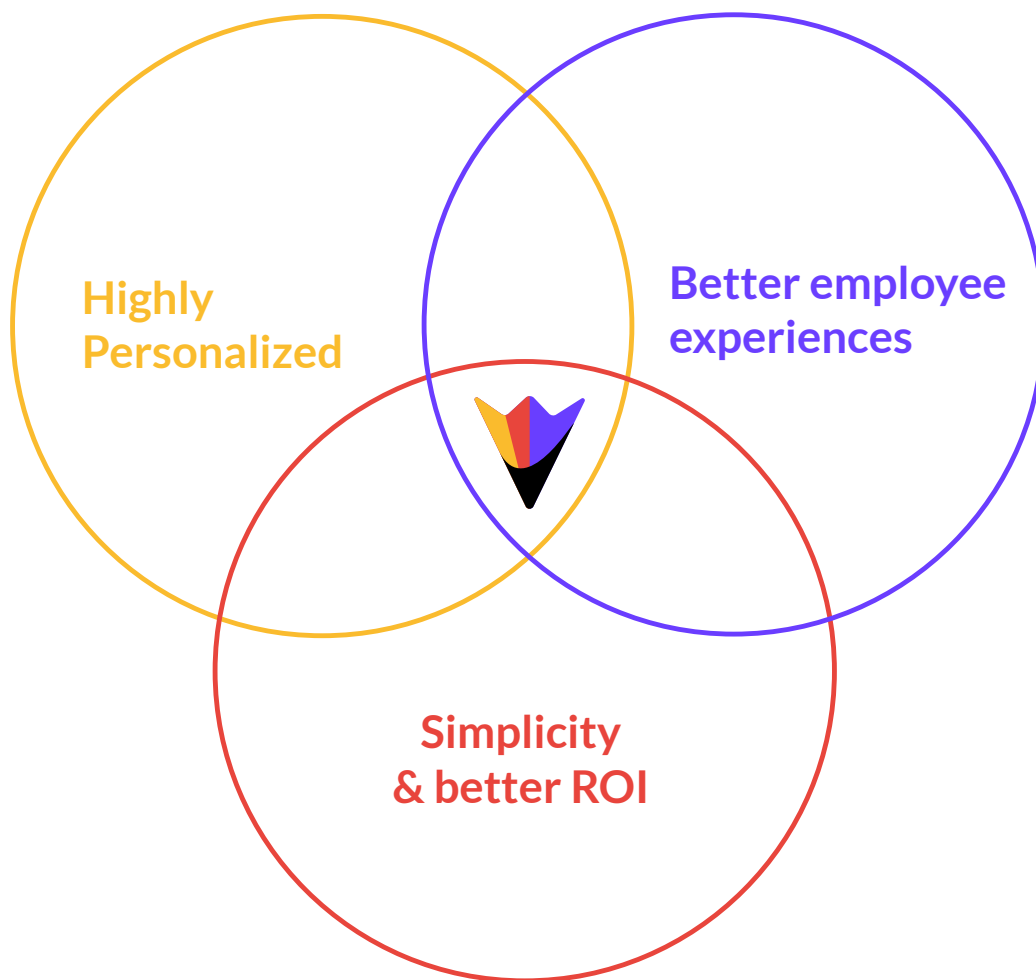


- **Uniform design across modules:** A canvas creation for one module can be seamlessly copied to other modules to maintain a uniform design and color style. Any detail that's not associated in the new module can be reconfigured at any time.

2.3 How Canvas helps users

Canvas helps companies experiment with multiple designs with input from salespeople and other end users. After all, they're the people who are going to spend the majority of their day in Zoho CRM. Admins can remodel the list page and detail page of each module, to better suit everyone's needs based on their suggestions.

This solves three critical challenges that businesses are facing right now: lack of personalization, bad employee experience, and complex implementations.



- **Create personalized instances:** Canvas helps companies design a version of CRM that fits their industry and work culture. Administrators can design views with fields, labels, buttons, and lists that are relevant to their business, so that the end users can get the most out of Zoho CRM. Customers can enjoy the tailored experience of a vertical CRM, with all the capabilities of a general purpose CRM.

Healthcare Industry

The screenshot displays the Zoho CRM interface for the Healthcare Industry, specifically for a patient named Todd Hernandez. The interface is organized into several sections:

- Header:** Includes the Zoho CRM logo, a dropdown menu for "Health Care", and navigation tabs for Home, Doctors, Patients, Appointments, Insurances, and Dashboards. A search bar and notification icons are also present.
- Patient Profile (Left Sidebar):**
 - Profile Card:** Features a profile picture of Todd Hernandez, his name, birth date (June 2, 1972, 63 years), gender (Male), phone number (070 4820 4376), and MRN# (25AF-A5Wg).
 - Best Time to Contact:** Shows "10:15 am in 30 min" as the best time to call.
 - Address:** 103 Souterhead Road Lower Boscawell TR19 1QB.
 - Email:** toddhernandez123@gmail.com.
 - Emergency Contact:** Name: Mike Hernandez, Relationship: Son, Phone: 077 6432 9935.
 - Last Encounter:** 19 Jul 2019 with Dr. Veera.
- Main Content Area:**
 - History:** A list of recent events:
 - Patient has submitted their CT scan. Awaiting analysis. (15 Jun 2019 by Martin Nichols)
 - Dr. Grant visit concluded. Patient needs CT scan. Report updated. (15 Jun 2019 by Martin Nichols)
 - Patient made a visit for check up. Form submitted. (15 Jun 2019 by Martin Nichols)
 - Diabetes report has been verified, sent to patient. (15 Jun 2019 by Martin Nichols)
 - Documents:** A table listing uploaded files:

File name	Uploaded by	Uploaded Date	Clearance
CT Scan.jpg	Mariam, 2322	15 Jun 2019	Pending
Health report.jpg	Dr. Grant, 0012	15 Jun 2019	Verified
Prescription.jpg	Emmanuel, 8221	02 May 2019	Verified
Dialysis report.jpg	Mariam, 2322	12 Apr 2019	Pending
Diabetes report.jpg	Dr. Grant, 0012	12 Apr 2019	Verified
Prescription.jpg	Anne, 6326	12 Apr 2019	Verified
- Right Sidebar:**
 - Vitals:** Heart Rate (54 bpm) and Temperature (97 c).
 - Conditions:** Type 2 Diabetes Mellitus, Moderate Chronic Obstructive Pulmonary Disease.
 - Medications:** Avandia, BD Ultrfine Needles, Insulin, Lisinprol.
 - Allergies:** Penicillin, Sulfa.
 - Doctors:** Primary Dr. Grant, 0012; On Record - Dr. Emma, 0056; Dr. Alexis, 0069.

- **Improve employee experience:** With Canvas, companies can build a CRM that's pleasant to work with, period. Users can create views with a minimalist design, nice colors, which are easy on the eye and the mind. Customers can reorder, hide, highlight, and reposition fields, related lists, and buttons, to help their salespeople work better.

Insurance Service

The screenshot displays the Zoho CRM interface for an Insurance Service. The top navigation bar includes tabs for CRM, Insurance, Home, Leads, Clients, Policies, Claims, Activities, and Dashboards. The main content area is divided into several sections:

- Client Profile:** Features a profile card for Mike Stewart with Client No: US28930 and Status: Active. Below the card are tabs for Applicant 1, Applicant 2, and Applicant 3. The profile includes fields for DOB (23/07/1989), Marital status (Married), Phone (202 555 0157), Mobile (+12127319863), Email (jamesstewart.ins@gmail.com), and Address (2314, Big Cali, New Orleans, LA, Louisiana).
- Policies:** A section titled "Policies" with an "Add Policy" button. It displays two policy cards:
 - Policy No: VE982:** Inception date: 12/03/2017 to 12/03/2023, Policy Type: Vehicle Insurance, Policy premium: \$1,400.
 - Policy No: LI451:** Inception date: 04/07/2018 to 04/07/2038, Policy Type: Life Insurance, Policy premium: \$1,100.
- Claims:** A table listing claims with columns: Claims No, Policy No, Claims Date, and Claims Amount.

Claims No	Policy No	Claims Date	Claims Amount
CA532	VE982	29/08/2020	\$70,000
CA532	VE982	29/08/2020	\$70,000
CA532	VE982	29/08/2020	\$70,000
- Open Activities:** A section titled "Open Activities" with tabs for Documents, Notes, and Timeline. It displays three activity cards:
 - Premium Update:** Due Date: 13/12/2020, Priority: MEDIUM, Owner: Antony K, Type: Call.
 - Query about tax benefit:** Due Date: 27/10/2020, Priority: HIGH, Owner: Mariaah G, Type: Meeting.
 - Schedule Meeting:** Due Date: 21/10/2020, Priority: MEDIUM, Owner: Mariaah G, Type: Call.

CRM

Sales Team ▾

Home

Clients

Accounts

Loans

Cards

Offers

⋮

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📄

🗑️

✉️

⚙️

👤

☰

Jessica Martin
✉️ jessmartineda@gmail.com

📞 231-876-8558

📠 586-904-4097

📍 1329 Bee Street, Cadillac, Michigan

Agent Details

Jeremiah Dixon
Sales Associate

AgentID SE238

Mobile 972-845-9392

Email jeremiahdic8347kk@gmail.com

Offers

Gold Loan Offer
Loan Amount: \$65,000
Interest Rate: 3.5% Offers Upto: Jul 2021

< >

Send Mail Edit ⋮

Accounts details

Add Account

Account No
124891737147376 Salary Account

Branch Name **Fairfax**
Branch Code **F3129**

Account No
2215489834347837 Savings Account

Branch Name **Fairfax**
Branch Code **F3129**

< 1 of 10 >

Loan Details

Home Loan

EMI Amount
\$1,800

Loan Amount **\$125,000**
EMI Duration: **76 months**

Vehicle Loan

EMI Amount
\$1,200

Loan Amount **\$70,000**
EMI Duration: **58 months**

Cards Details

Debit Card

4539 XXX XXXX 3763
Expiry Date: 22/09

Credit Card

5293 XXX XXXX 3822
Expiry Date: 21/07

Open Activity

Subject	Type	Due Date	Priority	Owner
Follow up call at 8:30.	Call	21/08/2020	Medium	Jeremiah Dixon
Credit card related	Call	21/08/2020	Medium	Jeremiah Dixon
Personal loan related	Meeting	21/08/2020	Medium	Jeremiah Dixon

2.4 Canvas is for everyone

- **For collaborative selling:** Companies can share their Canvas views with vendors, partners, and consultants using portals. Sales has become an increasingly collaborative process where different parties need to be involved at various stages of a sale, and Canvas helps facilitate this collaboration.

E-commerce Page

CRM Home Contacts Products Quotes Sales orders Invoices Cases ...

← Clone Edit ... < >

Zeus Watch Series 3 GPS - Multiple straps, Space Gray steel case. (UK edition) [Follow](#)

4.2/5 rating - 2,923 ratings | 691 reviews

Availability **281 in stock.**

Best Price **\$1,250**

Seller Details

Product Owner	Tony McBride
Mobile	443-235-5025
Email	tonymbc86@gmail.com

Highlights

- GPS and Altimeter
- Waterproof
- Heart Rate Monitor
- Breathe App
- Notifications
- Battery Runtime: Upto 18 hrs

Services

- 1 Year Module Warranty
- 2 Year Strap Warranty
- Bank, Delivery Offers Available

Power for the whole day

Zeus Watch Series 3 packs a dual B21 bionic chip and a 1,200 mAh Li-On battery, that can track your health signals, show notifications, make calls, and more, round the clock.

Make payments with NFC

Series 3 brings NFC to the smartwatch arena. Make payments on the go effortlessly with the Zeus Watch – no need to pull out your phone or wallet!

Your emergency assistant

Built with a heart rate sensor and blood oxygen sensor, Zeus Watch Series 3 monitors your vitals constantly, and sends SOS push notifications when something is off.

Change track from the wrist

Zeus Watch Series 3 packs a material player controls, compatible with popular music players. Listen to the right song, at the right volume that complements your workout.

- **For superior self-service:** Today's customers are very protective of their data and they appreciate having the option for self-service. They can fill in their information and review it directly in your company's own custom Canvas creation, which makes their experience better as well.

- **For a thriving community:** Customers who create new Canvas views can share them with the community, so that other businesses can use them as well. Through Canvas, Zoho CRM aims to create a community of designers that can submit, edit, and implement templates, similar to the community WordPress created for websites.

2.5 Canvas sets the precedent for UX autonomy

Zoho also plans to introduce Canvas to the entire Zoho CX suite, and eventually to our entire product range. This way, companies can enjoy the Zoho ecosystem with a consistent design across the board.

We believe that when companies have control over their user experience, the results will be incredibly beneficial for the end user, the organization, and the vendor. We're on a mission to ensure that the specific requirements of every industry, every company, and every team are met through Canvas.

As we spearhead this new era of personalized CRM, we're also continuously working on other user experience enhancements geared towards making it easy for end users to enjoy using Zoho CRM. This is a journey that never ends, and we're in it for the long haul.

This is a major milestone in our mission to create the **Gold Standard of CRM Experience**, and we're glad to have you on board with us.

Resources

- **Overview video:**
<https://youtu.be/cZZQTzGQXhU>
- **Webinar:**
<https://www.youtube.com/watch?v=bhWiApPs9mI&feature=youtu.be>
- **How-to:**
<https://help.zoho.com/portal/en/kb/crm/customize-crm-account/managing-module-views/articles/customize-record-detail-page-canvas>
- **FAQ:**
<https://www.zoho.com/sites/default/files/crm/zcrm-canvas-earlyaccess-faqs.pdf>



Canvas

For a beautiful CRM, handcrafted by you.



zoho.com/crm