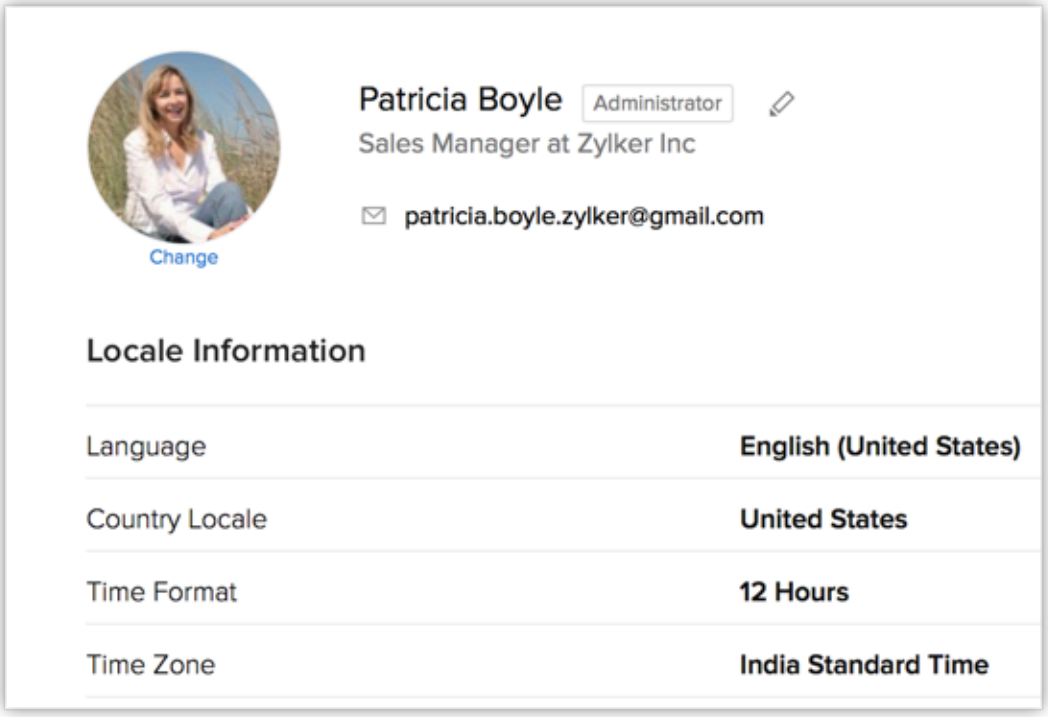
Zoho Corporation

Set up your Organization Account

As an administrator your first step towards implementing Zoho CRM for your organization will involve entering details in the personal settings and defining the organization details, which will be visible to all users across the departments. You will also need to define the email settings in your CRM account and configure Gamescope to keep your team members motivated by giving timely rewards and perks.

Personal Settings

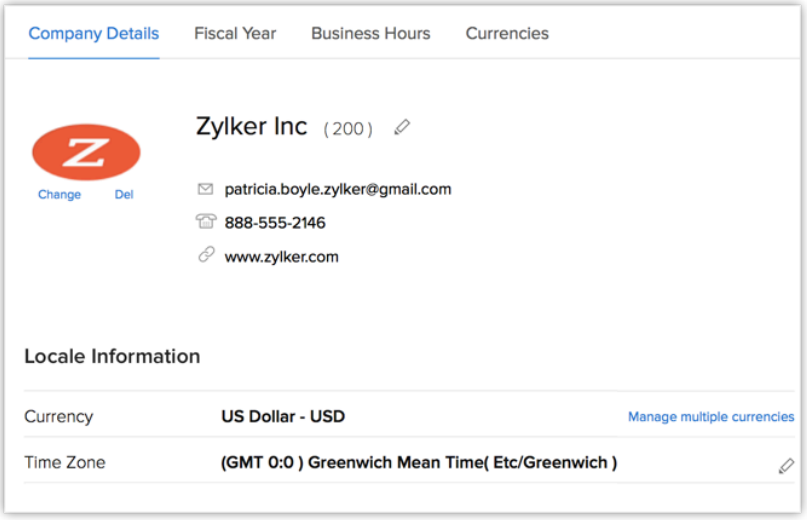
First, personalize your CRM account by changing language and time zone. Also, add your personalized signature to be used for business emails sent via Zoho CRM.



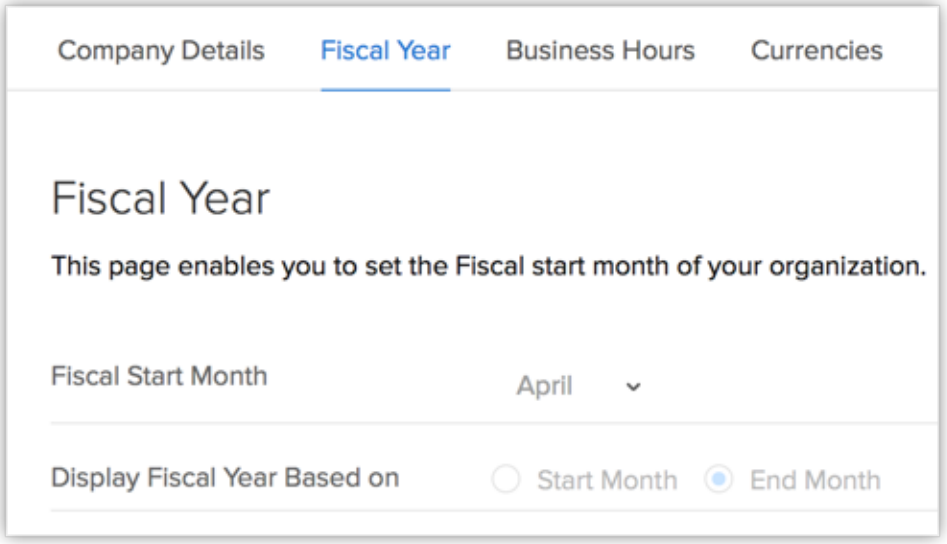
Organization Settings

- **Company details:** Add your company details such as the company name for all your business communication, country locale, time zone and also the company logo. Note that the image file size should not exceed 10MB and

for best results, use an image with 190 (width) by 65 (height) pixel dimensions.

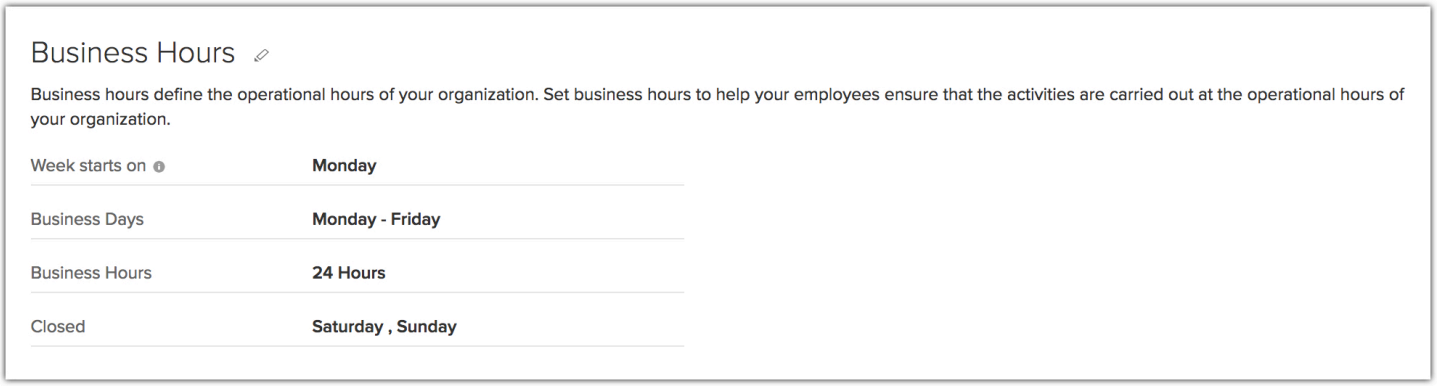


- **Fiscal Year:** Set up the fiscal year for your company which is used for accounting purposes and preparing financial statements. The fiscal year may not be the same as the calendar year. Select the fiscal start month, then the fiscal quarters are automatically rolled up.



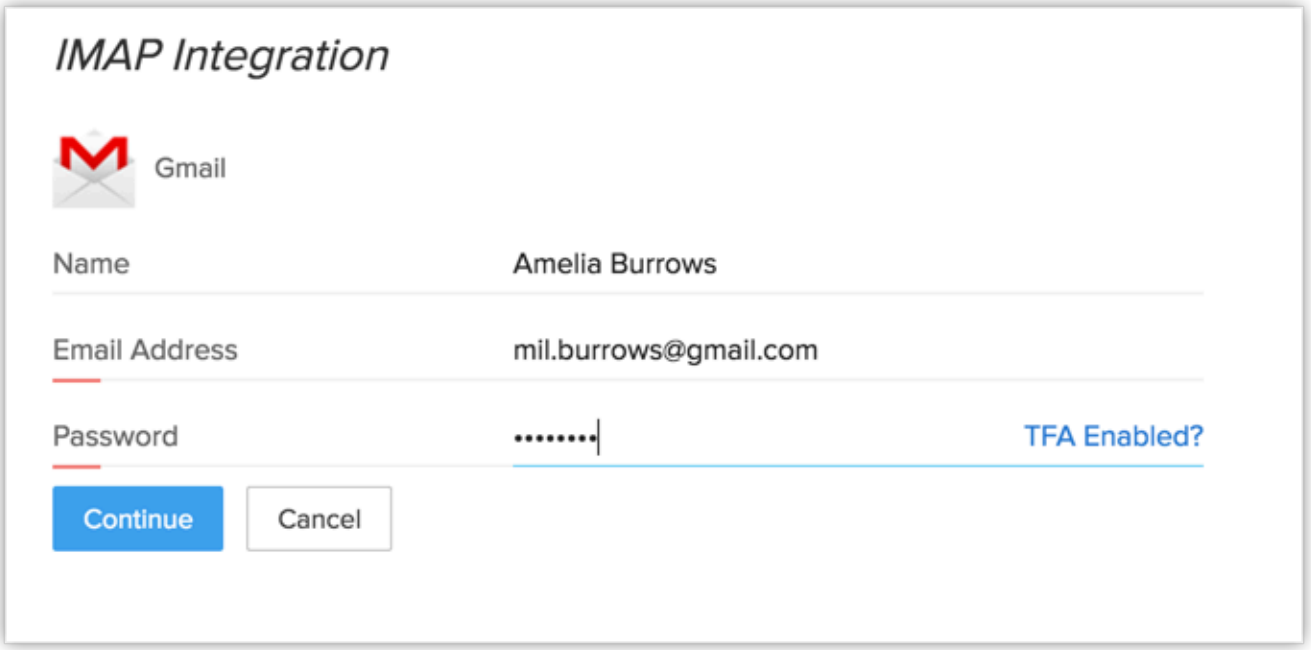
- **Business Hours:** Various teams in your organization may work at different business hours and work in shifts based in different time zones. Define your business hours that will be helpful in assigning cases to individuals

using the case escalations rules.



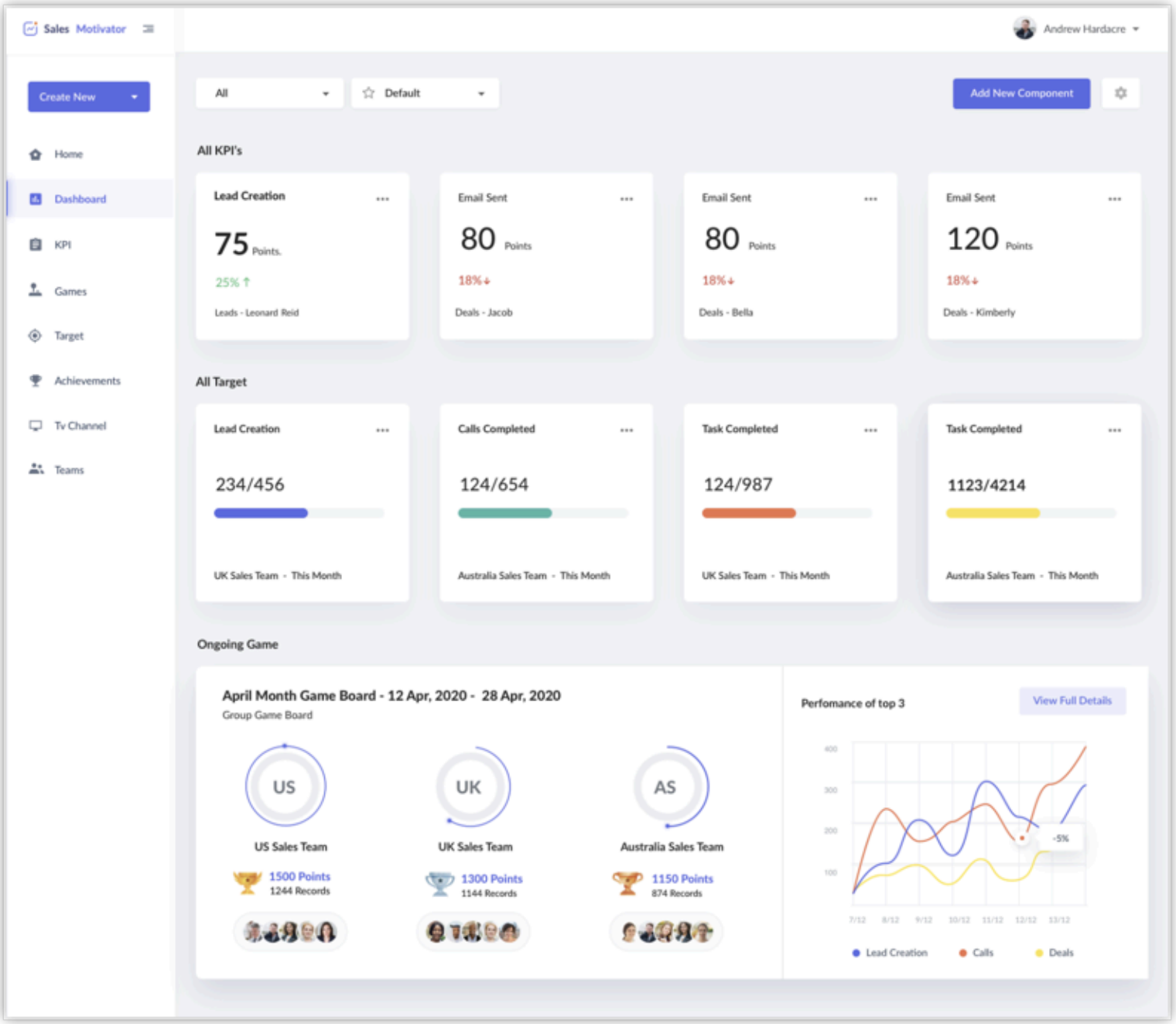
Email Settings

Configure your email account in Zoho CRM via IMAP to work with sales as well as email from one place.



Motivator

Make sales more fun by configuring sales contests and rewarding your team members with trophies and badges.



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