Managing CRM Account Settings

Table of contents

Changing Themes

Once you sign up for Zoho CRM and have your own account, you can personalize your CRM account. By default, the mandatory information provided by you at the time of sign up, is automatically updated. After logging in, you can change these details according to your preferences.

The following table gives the list of functions that are specific to Administrator and Standard Users:

Functions	**Privilege**
Change Name	Administrator and Standard User
Change Address Information	Administrator and Standard User
Change Language	Administrator and Standard User
Change Date Format	Administrator and Standard User
Change Time Zone	Administrator and Standard User
Change Name Format	Administrator and Standard User
Change Email ID*	Standard User
Change Password*	Standard User
Change Security Question*	Standard User
Change Answer*	Standard User
Change Profile	Administrator

Change Role	Administrator
Change Currency	Administrator
Add User	Administrator
Activate/ Deactivate User	Administrator
Re-Invite User	Administrator

Change Personal Information

You can change your personal details such as name, phone number, website, date of birth, address, language, time format, time zone, etc.

To change personal details

1. Go to **Setup** > **General** > **Personal Settings**.
2. In the *Personal Settings* page, click **Edit** icon for the corresponding section.
3. Modify the personal details in the *Account Information* pop-up as required. (Refer to the table below)
4. Click **Save**.

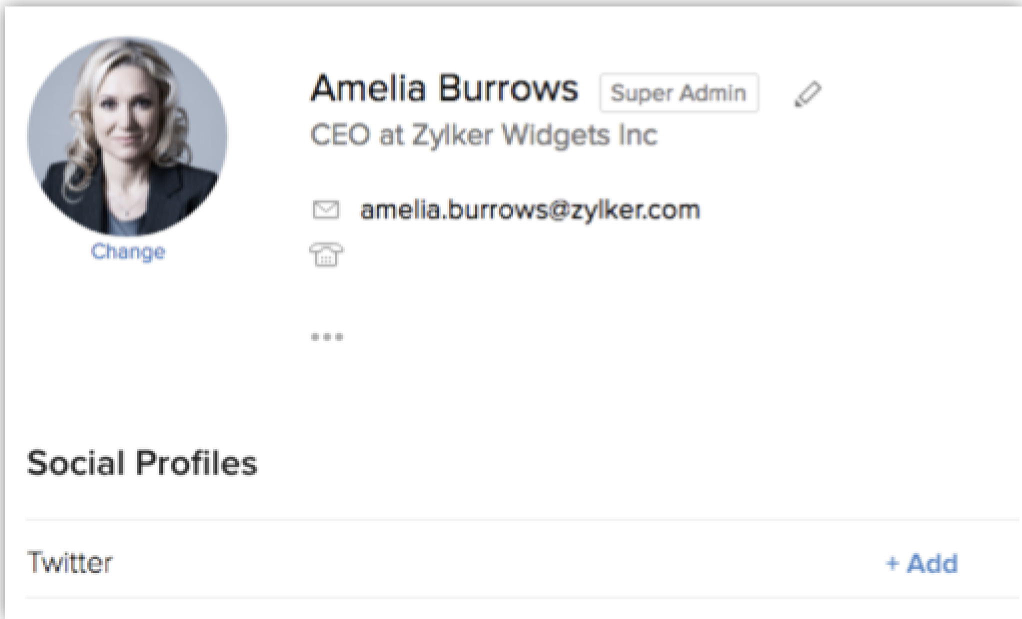
List of Standard Fields

Field Name	**Description**	**Data Type**
First Name	Specify the first name of the user.	Text box
Last Name*	Specify the last name of the user. This field is a mandatory field.	Text box
Alias	Specify the other name of the user.	Text box
Role*	Select the role (for example, Administrator, Standard User, and others). This is a mandatory field. Only if you have the Administrator profile, you can change this value.	Pick list
Email*	Display the primary E-mail ID of the user. This field can be updated in Zoho Accounts.	Email

Website	Specify the website URL of the user.	URL
Phone	Specify the official phone number of the user.	Pick list
Mobile	Specify the mobile phone number of the user.	Text box, integer value
Fax	Specify the FAX number of the user.	Text box
Date of Birth	Select the date of birth of the user from the mm/dd/yyyy drop-down list	Date box
Street	Specify the primary address of the Zoho CRM user.	Text box
City	Specify the name of the city where the user lives.	Text box
State	Specify the name of the state where the user lives.	Text box
Zip	Specify the postal code of the user's address.	Text box, integer value
Country	Specify the name of the user's country.	Text box
Language*	Select the language. This field is a mandatory field.	Pick list
Country Locale*	Select the country locale to specify your date format. This field is a mandatory field.	Pick list
Time Zone*	Select the time zone in which you are working. This field is a mandatory field.	Pick list

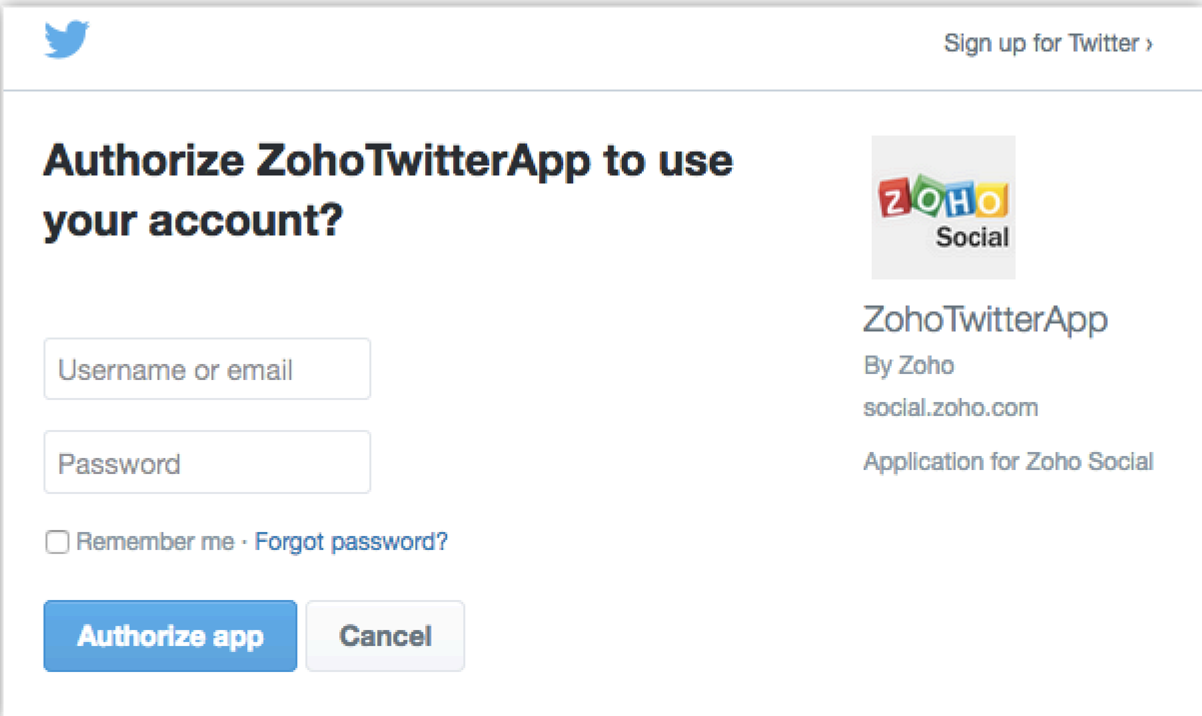
Add Social Information

Add social profiles to your CRM account. You can add only your Twitter account details in the social profile.



To add a social profile

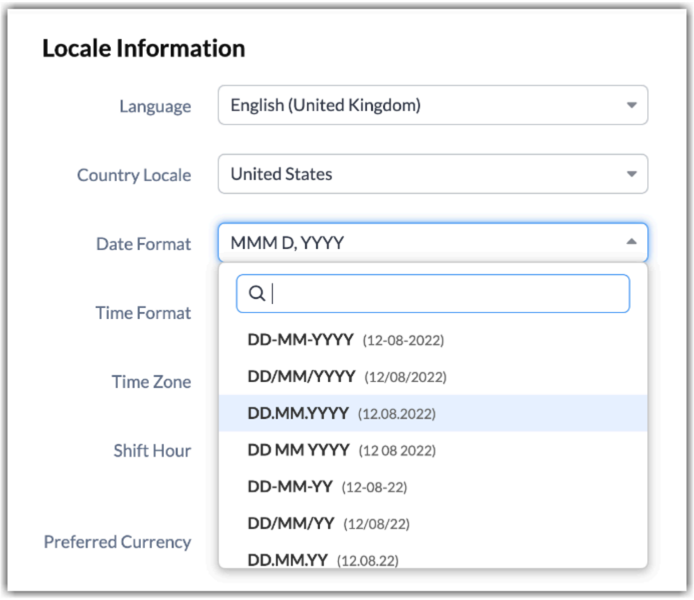
1. Go to **Setup** > **General** > **Personal Settings.**
2. Choose any of the social profile from the available list and click the **+Add** link.
3. Enter the login credentials and click **Authorize app**



Your social profile will now be linked with your CRM account. You can also change any of these profiles, reauthenicate or delete them whenever required.

Change Locale Information

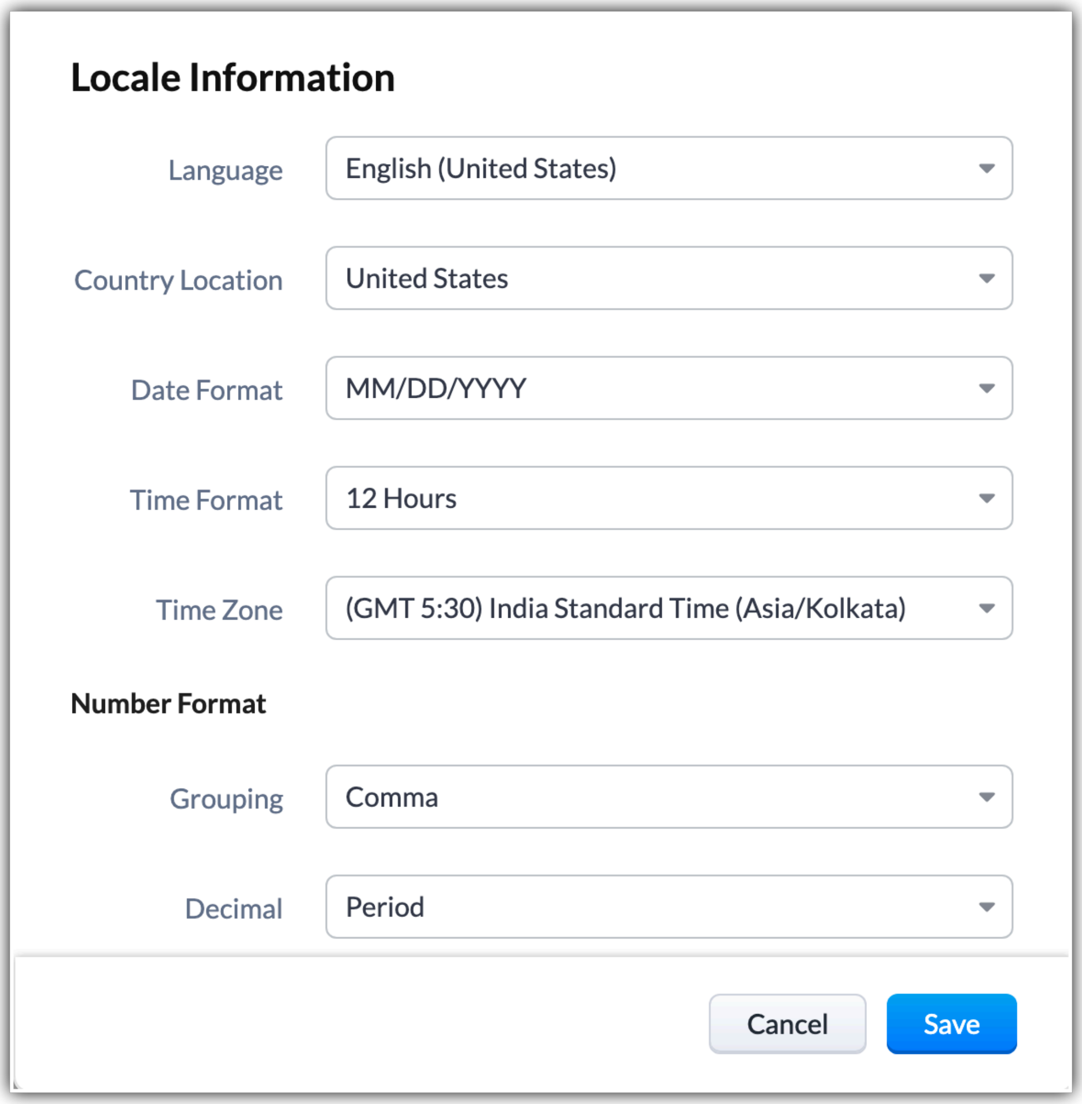
Based on the country locale, you can mention the language for your account. Also, choose between 12 hr time format and 24 hr time format in the CRM account. The date format is automatically updated with the country locale that you select. The following international date formats are supported:



To change Locale Information and Number Format

1. Go to **Setup > General > Personal Settings.**

2. In the *Personal Settings* page, click **Edit** icon for the *Locale Information* section.



3. On the Locale Information pop-up, choose the value from the corresponding drop-down lists for Language, Country Location, Date Format, Time Format, and Time Zone.

4. In the Number Format section select the Grouping, and Decimal options.

5. Click **Save**.

Change Name Format & Preferences

Under the *Name Format & Preferences* section, you can modify the name format and set sort order preferences.

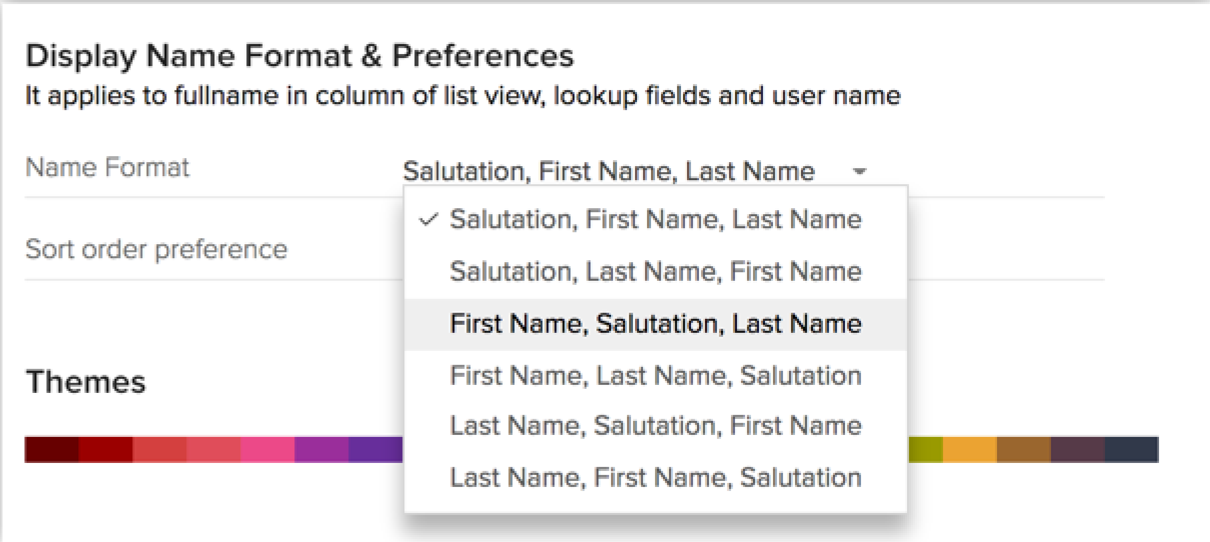
Change Name Format

By default, the name format is set as **<Salutation><First Name><Last Name>**. However, you can change the name format as per naming conventions used in your country.

Example: In the USA the name format is generally **<Salutation><First Name><Last Name>** whereas in Japan the format is **<Last Name> <First Name> <Salutation>**

To change name format

1. Go to **Setup** > **General** > **Personal Settings.**
2. Under *Name Format & Preferences*, select the required **Name Format** from the drop-down list.



This format will be saved instantly and applicable in list views, lookup fields and user name.

Set Sort Order Preferences

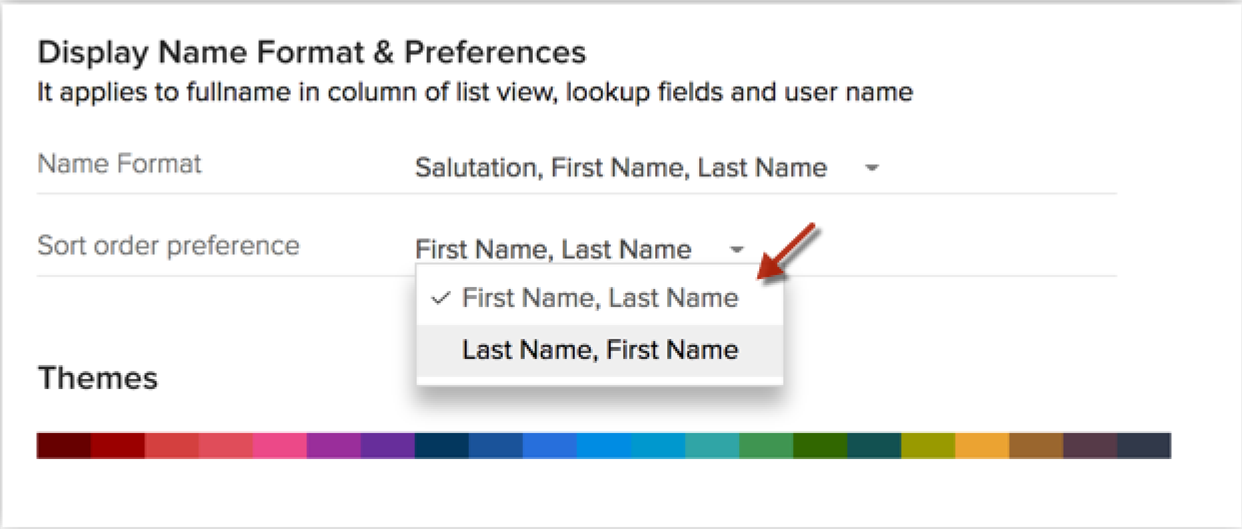
Records are usually sorted in the *[Module]* list view based on the name format. However, if you prefer to have a sort pattern that is independant of the display name format, you can set this preference under sort order preference.

For example, your display name format is **<First Name><Last Name>**. But you wish to sort records in the Ascending or Descending order based on **<Last Name> <First Name>**. You can do this by setting the suitable sort order preference.

To set sort order preferences

1. Go to **Setup** > **General** > **Personal Settings.**

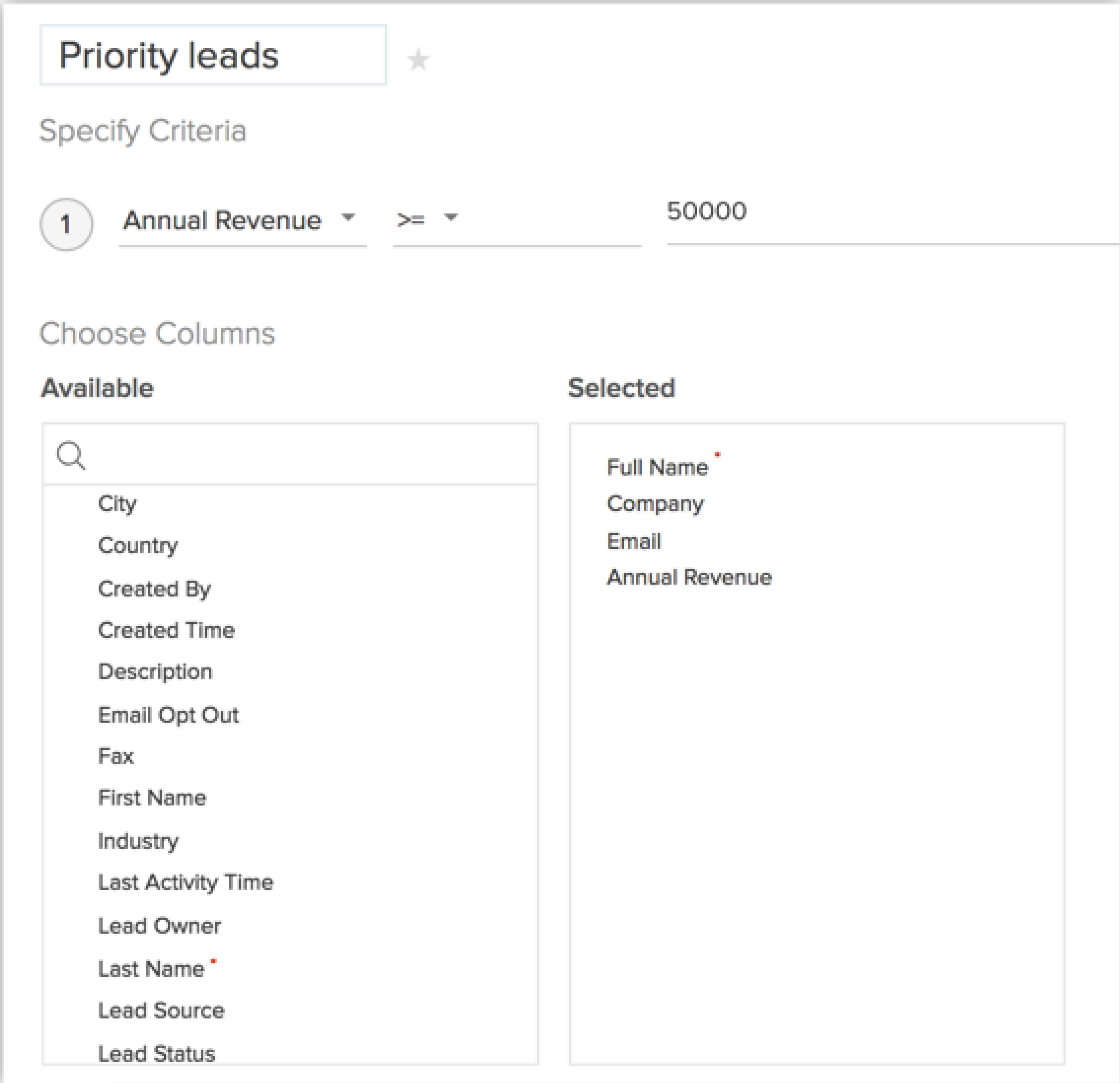
2. Under *Name Format & Preferences*, select a suitable option from the **Sort Order Preference** drop-down list.



You will be able to sort the records based on this format even if this is not the display name format.

Full Name field in the List View

While creating a custom list view for a module, you will find a field called **Full Name** under *Available Columns*. This is a combination of the **First Name** and **Last Name**. This can be pushed to *Selected Columns*. Once used in a list view, the *Full Name* field will be displayed as **Lead Name** and **Contact Name** in the **Leads** and **Contacts** modules respectively.



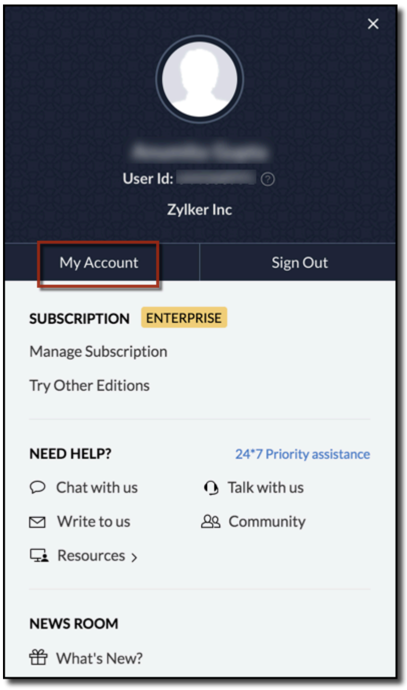
Note that the First Name, Last Name and Full Name are indivudual fields, based on which records in the list view can be sorted in the ascending or descending order.

Change Password

Zoho provides Single Sign on service, and so if you change password for Zoho CRM, it will be changed for all Zoho Services. You can change password from Zoho Accounts. Please note that you cannot change password for other users.

To change password

1. Click **Settings** icon and then click **My Account**.



2. In the *Zoho Accounts* page, click **Security**.

3. In the *Password* page, enter your **Current Password** and **New Password** in the corresponding fields.

4. Click **Save**.
   The New Password gets updated and should be used to sign in to all Zoho Services.

Changing Themes

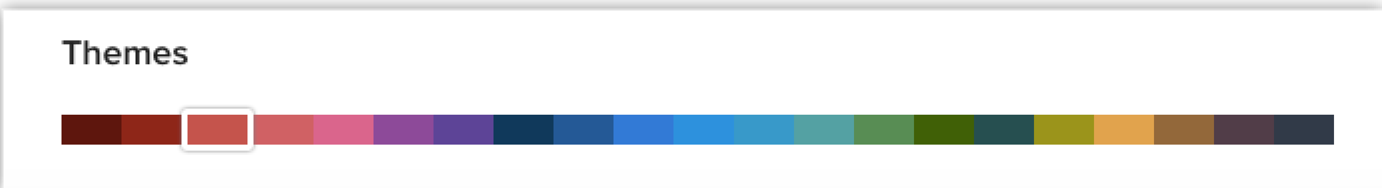
Zoho CRM Themes give individual users the option to customize the colors in their CRM account. Using the **Themes** feature, you can change the background color of tabs.

Please note that this customization is User specific, i.e. a theme changed by one user will not be reflected in another user's CRM accounts.

To change theme

1. Go to **Setup** > **General > Personal Settings**.

2. In *Personal Settings* page, you can choose any theme from the available list as per your requirements.



SEE ALSO

Manage Zoho account settings