Manage Company Settings

There are certain organization specific details, which help differentiate one organization from another. Zoho CRM recommends Users with Administrator's privilege to customize these company specific details, so that all users under an organization-specific account will have these common features.

Edit Company Settings

To change company settings

1. Log in to Zoho CRM with Administrator privileges.
2. Go to **Setup** > **General** > **Company Settings**.
3. Under *Company Settings* tab, click **Edit** icon.
4. In the *Company Settings* pop-up, add the necessary details of your company.
5. Click **Save**.

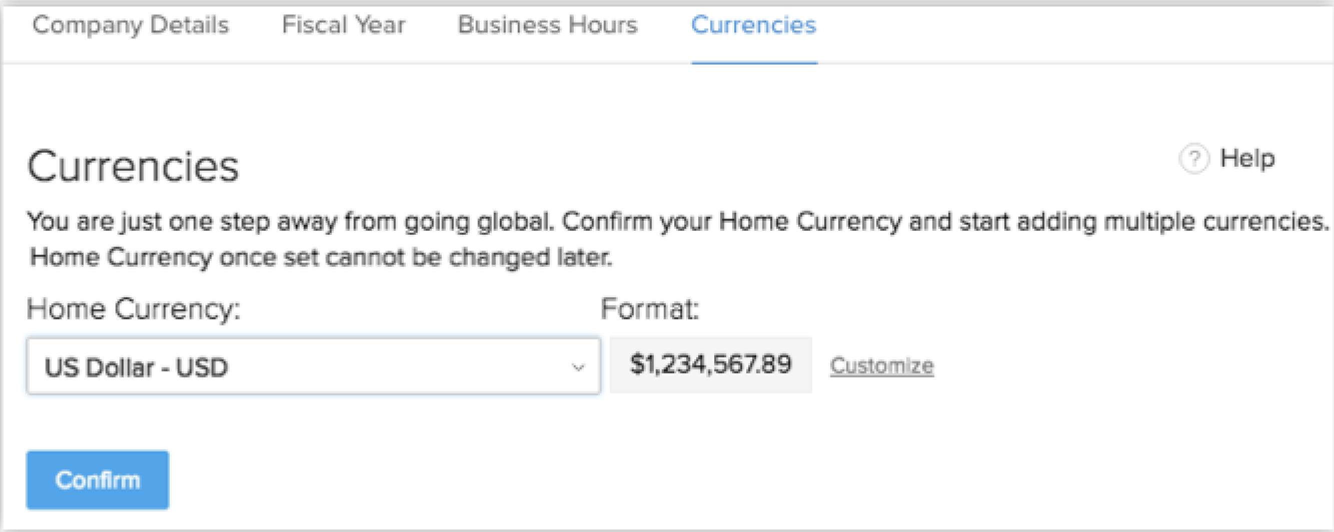
Set Currency

Setting currency is an organization specific feature. By default, the currency is set to US dollars ($). However, user(s) with Administrator privilege can change the currency settings depending on the organization's requirement. Based on the country locale you choose, the currency value will be updated for Quotes, Invoices, Campaigns and other billing related fields.

To select currency

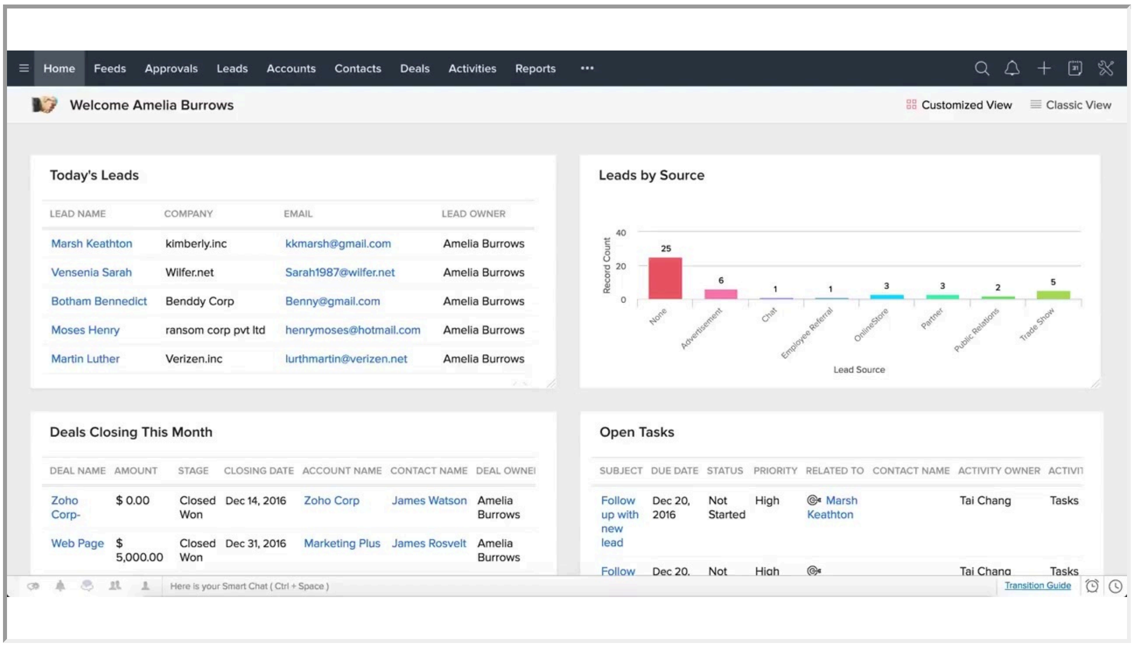
1. Log in to Zoho CRM with Administrator privileges.
2. Go to **Setup** > **General** > **Company Settings**.
3. Under *Currencies* tab, choose Home Currency from the drop-down.

4. Click **Confirm**.



Personalize Logo

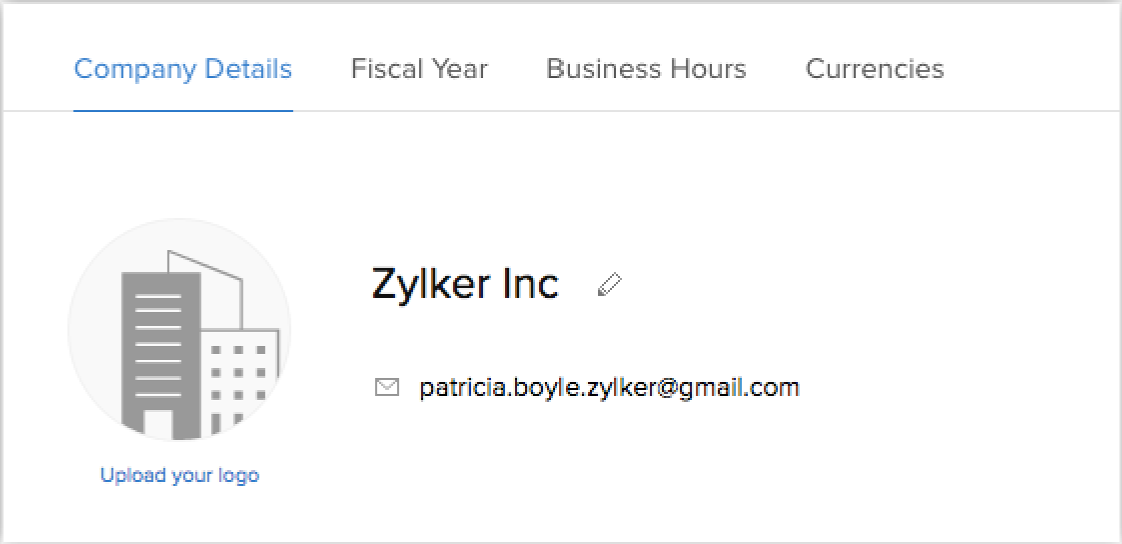
In order to give a personalized look to your account, Zoho CRM allows organizations to change the default logo to your company logo. The customized company logo will appear for all users within your CRM account.



- The image file size should not exceed 20 KB.
- For best results, the logo dimension should be 190 (width) by 65 (height) pixels.
- The logo file format should be .jpg / .png / .gif.

To personalize logo

1. Log in to Zoho CRM with Administrator/Super Administrator privileges.
2. Go to **Setup** > **General** > **Company Settings**.
3. In the *Company Settings* page, click **Upload your logo** link.
4. Browse and upload the logo. The logo file should be .jpg / .png / .gif format.



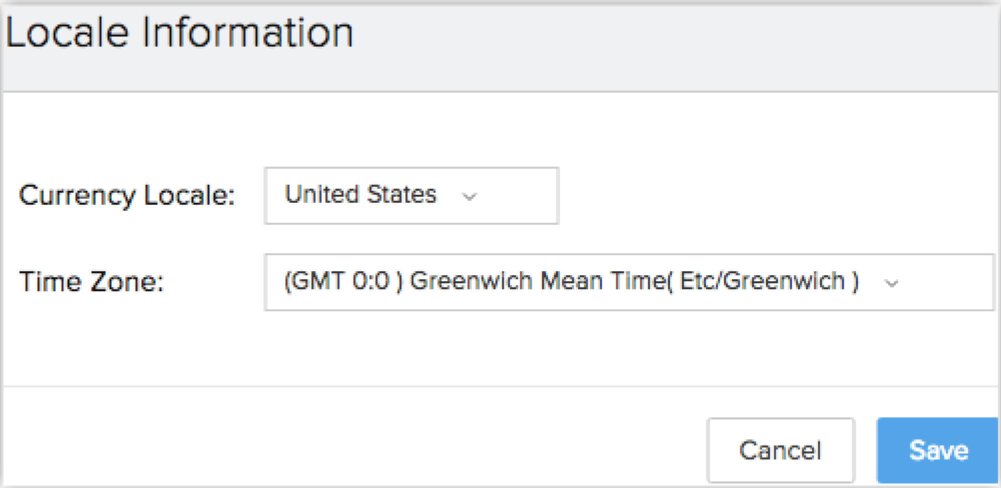
Set Organization Time Zone

You can define a common time zone for your organization's Zoho CRM account. For Workflow Rules, a day will be calculated based on this time zone.

To set the organization's time zone

1. Log in to Zoho CRM with Administrator privileges.
2. Go to **Setup** > **General** > **Company Settings**.

3. In the *Company Settings* page, under *Locale Information* click **Edit** icon.



4. In the *Locale Information* pop-up, select the **Country Locale** and **Time Zone** from the **drop-down** list.
5. Click **Save**.

Assign Super Administrator

The Super Administrator is the single point of contact for all communications regarding the transactions and bills from Zoho CRM. Also, only the Super Administrator of the organization's will hold the privilege to change an Admin to Super administrator.

To select super administrator

1. Log in to Zoho CRM with Administrator privileges.
2. Go to **Setup** > **General** > **Company Settings**.
3. In the *Company Settings* page, click **Edit** icon.
4. In the *Company Settings* pop-up window, select the **Super Admin** from the list.
5. Click **Save**.

Note

- Only the active users with the default Administrator profile in Zoho CRM can be selected as the Super Administrator in an organization.
- Only the Super Administrator can delete users in CRM.

SEE ALSO

Manage Business Hours

Manage Hierarchy Preference

Setup Fiscal Year

Using Multiple Currencies

Managing multiple Currencies