Zoho Corporation

Set up Zoho One

Sign up for Zoho One

If you're new to Zoho, follow these steps:

1. Go to [Zoho One's homepage](#) ⤢, then click **START YOUR FREE TRIAL**.
2. Enter all the requested details, then click **GET STARTED NOW**.
3. Go through the onboarding tour, choose a category to start with, then add your first set of Zoho apps.

> ⓘ Note: Although Zoho One provides all the included apps at no additional cost, we suggest you start with a few necessary apps and get acquainted with them. You can always add more apps later.

4. After the onboarding tour, confirm your Zoho account through the welcome email you received. Many admin operations can only be performed after confirming your account.

If you're already using any Zoho apps, follow these steps:

1. Go to [Zoho One's homepage](#) ⤢, then click **ACCESS YOUR APPS**.
2. Enter all the requested details, then click **CREATE ACCOUNT**.
3. Go through the onboarding tour to find the list of apps you're already subscribed to. Choose the apps you'd like to associate with Zoho One, then click **Continue**.

> ⓘ Note: If you are trying to add a paid app, then you need to [upgrade your Zoho One trial plan to a paid subscription](#).

All the users in the chosen apps will automatically be imported to Zoho One. You can now manage them through the Zoho One admin panel.

Access the admin panel

Once you've completed the sign-up process, you can start exploring Directory, the admin panel of Zoho One. Zoho One's Directory is the central administrative console for managing your entire Zoho One implementation. It allows you to manage your workforce, monitor the apps you've added, and oversee your organization's security.

To access the admin panel:

1. Sign in to [Zoho One](#). You will land in Zoho One's *Home,* where you can create dashboards.

2. Click **Directory** in the left menu to access the admin panel.

Build your organization

Now that you're in the admin panel, let's start digitally constructing your organization. The first thing you'll want to do in Zoho One is to add a domain. Many operations in the admin panel will require you to add a domain first. For example, you will not be able to sync your employees from your AD, or create mailboxes for them, without adding a domain first. So, let's start setting up your organization by adding a domain, verifying it, and enabling mail hosting. Learn more about domains

Next, you can create designations and add work locations. Designations are the job titles or official roles of your employees. Work locations are the branches or offices of your organization. Creating these can make onboarding and managing users easier.

Manage your apps

Now that you've set up most of your organization's structure, let's take some time to explore all the different apps you've added to Zoho One. Every Zoho app has its own settings, and configuring them will make it easier to assign users upon onboarding.

There are three types of apps that can be added to your organization:

- Zoho apps: These are the standard apps that come with your Zoho One subscription.
- Marketplace apps: These include Creator custom apps and SSO connectors for third-party applications.
- Non-directory apps: These are not available in the Marketplace. These include SAML apps, associated apps, and bookmarked apps.

During onboarding, you will be asked to select a business category your organization falls into. Based on the business category you select, certain Zoho apps that come under that category will be automatically added to your organization. Apart from these, there are also some default Zoho apps that will be added regardless of the business category you choose. These are Meeting, WorkDrive, Cliq, and Notebook.

You also have the option to add a Zoho app, add a new Creator custom app, or install a Marketplace app. Once you have added the apps you need, you can set about to configure and manage them.

Create groups

Creating groups should be your next step, as separating employees into manageable groups makes it effortless to administer them. Zoho One has two types of groups: Collaboration Groups and Departments. Departments let you digitally recreate your organization structure, while Collaboration Groups let you create miscellaneous groups of users for specific needs. Learn more about the two types of groups

Configure security policies

One of the main purposes of creating groups is that security policies can be applied to them; it's a very secure practice to have policies in place before onboarding employees. Security policies provide multiple ways to keep your organization and your employees safe, such as [password policies](#) to enforce specific standards for your employees' passwords, [MFA policies](#) to enforce multi-factor authentication, [IP restriction](#) to limit employee access from specific physical locations, and web session management to monitor your employees' signed-in sessions. [Learn more about security policies](#)

Set up conditional assignment

Once the apps are configured, they're ready to be assigned. [Conditional Assignment](#) can assign an app to everyone in a group, based on preset conditions. For example, you can [set a condition](#) to assign all the members of a group as Zoho Mail users, and all moderators of the group as Zoho Mail admins. The conditions will also apply to users as soon as they are added to a group, saving you the manual effort of assigning apps to users.

Onboard users

Once you set up your organization, you can start onboarding your employees. If you're migrating to Zoho One from your current environment, the easiest way to onboard employees is by [syncing them from your AD server](#). If you do not have an AD server, you can export your employees from your current SaaS implementation and [import them here through user data files such as CSVs or VCFs](#).

If Zoho One is your first SaaS implementation, you can add users manually in the **Users** tab.

Once your employees are added to Zoho One, you can add them to the groups you've created. Since apps and security policies are already assigned to the groups, they will automatically be assigned to the users when they are added to the group.

Delegate administration

Your organization is now completely set up. The only thing left to do is to administer and monitor it. You can always appoint additional admins to help you manage your organization. Zoho One supports two types of admins: organization admins can add and manage users, groups, and policies, while service admins can manage specific apps that have been added to Zoho One. [Learn more about admins](#)

Additional reading

Congrats! You're done setting up your Zoho One organization. If you'd like to understand the admin panel further, go through the [detailed admin guide](#).