



Zoho Corporation

Manage Accounts

What is the "Manage Accounts" settings in Zoho People?

The most vital part of setting up Zoho People for your organization is done here. This involves setting up your account and making preferences that impact the entire organization. It contains the essentials, such as importing and managing users and their logins, defining roles and permissions, managing access to services, defining the organization structure, departments, designations, and so on.

Who is the manage accounts settings aimed at?

Typically, setting up Zoho People is handled by HR administrators, administrative managers, consultants, or designated personnel within the HR department of an organization. They will essentially help setting up Zoho People for your organization and add and manage its users and the various HR processes.

Setting up Zoho People using manage accounts

To setup Zoho People, go to **Settings** (top-left corner gear icon) > **Manage Accounts** page.

Organization details

Here, you will be setting up a few basics and advanced preferences as listed below:

← Manage Accounts Users **Organization Setup** User Access Control Manage Service Subscription

Organization Details

Organization Policy

> Organization Structure

Locations

Departments

Designations

Domains and Rebranding

From Addresses

Basic Details

Logo 

Name *

Website

Type of organization

Contact person

Contact number

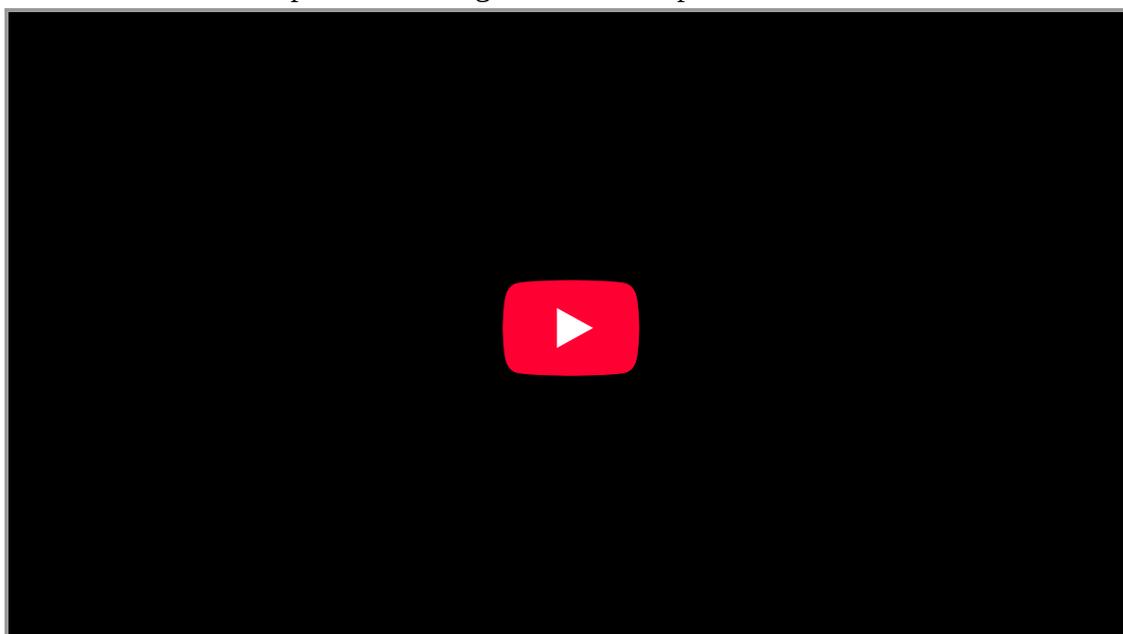
Contact email *

Primary address

Basics:

- **Organization Details** - This includes the basic details about your organization, such as the name, website, type, etc.
- **Organization Policy** - This includes preferences about chat and notifications, employee personal information visibility, search, locale and display formats, and profile picture preferences. [Learn more about Organization Policy settings.](#)

Watch our related Help Video on Organization Setup here:

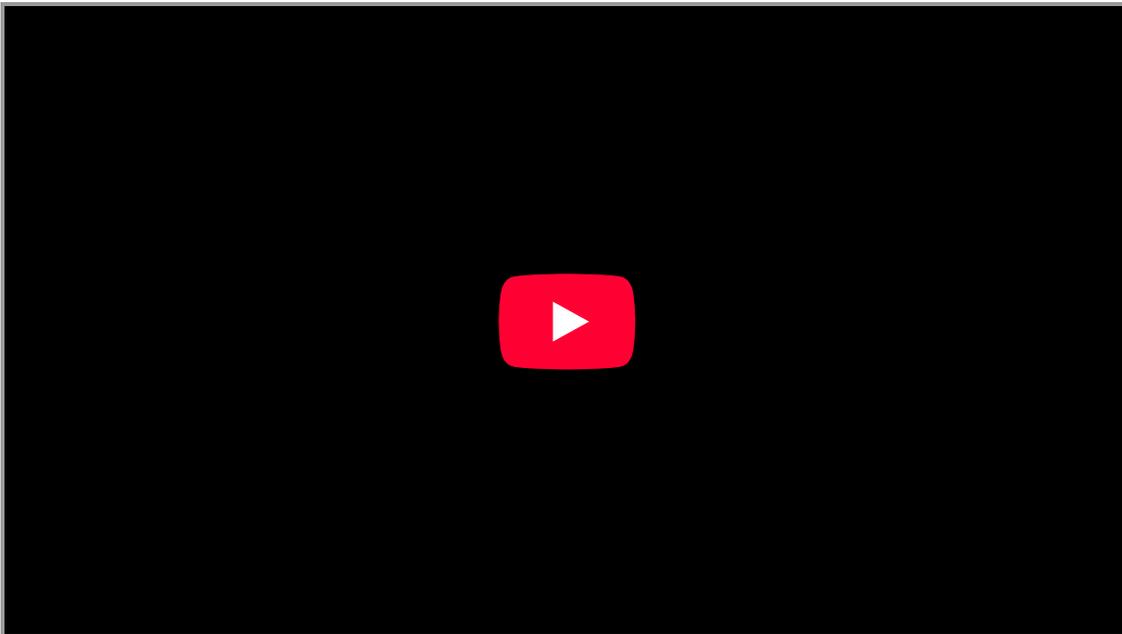


- **Locations** - Add the various geographical locations your organization is operating from.
- **Departments** - Add the various departments in your organization.
- **User Access Control** - Define and manage user permissions associated with the various roles (types of users in Zoho People), ensuring secure and role-based access to specific modules, data, and features within the platform. [Learn more about User Access Control.](#)

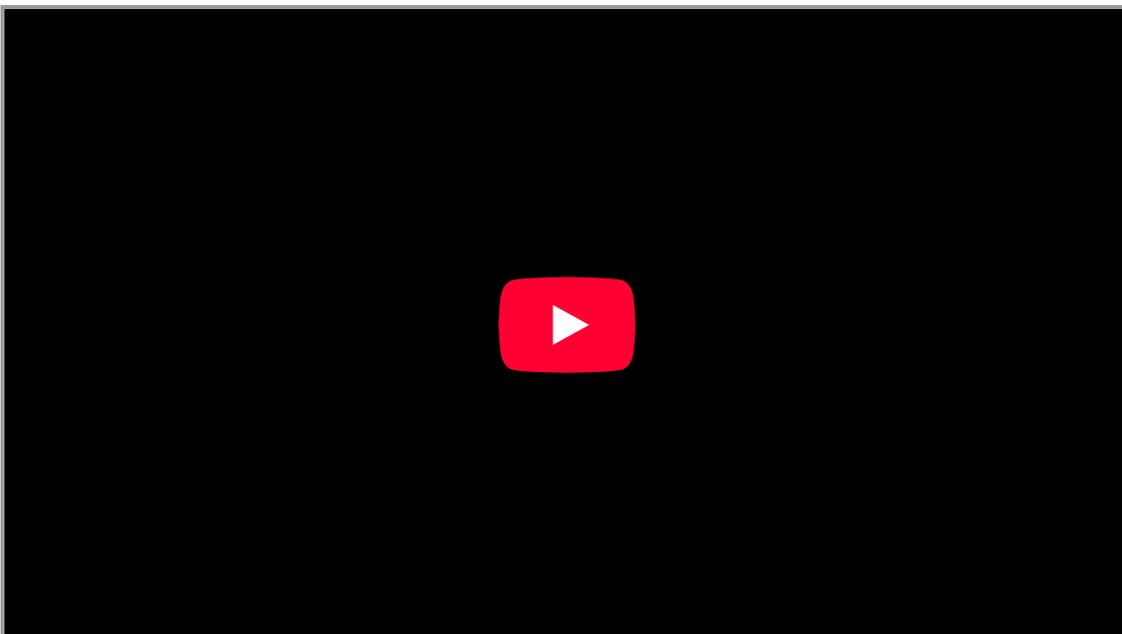
Advanced:

- **Organization Structure** - Configure your organization's hierarchy and maintain the data of multiple dependent companies in the same account.
- **Domains and Rebranding** - Add your organization's branded domains and verify them. This simplifies adding users directly. Rebranding lets you customize the Zoho People access URL as your own. [Learn more about Domains and Rebranding.](#)

Watch our related Help Video on Domains and Rebranding here:



- **From Addresses** - Manage the from addresses used for the official emails sent from Zoho People. Watch our related Help Video on From Addresses here:



Users

This space lets you add users (employees with login access to Zoho People) and employee profiles (candidates, temporary staff, contract workers, no login access). You have options to directly import users too.

Please view this table to understand the difference between Users and Employee Profile in Zoho People 5.0:

Users Vs Employee Profiles

	Users	Employee Profiles
Zoho People web access	Yes	No
Zoho People mobile access	Yes	No
Applicable modules	Access to all modules based on subscription*	Leave, Attendance, Timesheet, Employee Self-Service and custom forms - managed by managers or admins on behalf of employee
Primary Difference		
	An on-role employee in the organization with access to various Zoho People services with permissions based on role	Employee profiles are primarily used to store detailed records on staff, candidates, temporary work, contract workers, etc.
Attendance		
Through web check-in and check-out	Yes	No
Through mobile check-in and check-out	Yes	No
Through other integrated applications such	Yes	No

as Zoho Cliq, Zoho Mail		
Through biometric ID card	Yes	Yes
Through Zoho People Kiosk	Yes	Yes
Suitable types of employees	Full-time employees, Part-time employees, Contract employees (all with system access)	Temporary workers, on- site workers (managed by admin or manager on behalf of the employee)
Mandatory fields while adding	First name, Last names, Employee ID, Email Address**	Employee ID and First name

In short, **Users**

– These are employees who will have an email address and password and will be able to log in to their account. They can access their self-service and perform actions such as applying for leave, submitting timesheets, submitting self-appraisals, etc. First name, last name, employee ID, and email address are mandatory fields for adding a user.

Employee Profiles – These are employees who cannot log in to their account. These employees' details are maintained by the organization in the account. Security staff and contract workers can be examples of such employees. Since these employees cannot log in to their account, based on set permissions, their manager or the admins can apply leave or submit timesheets for them. Employee ID and first name alone are mandatory fields for adding an Employee Profile/ Non-User.

Watch our help video on users and employee profiles here:

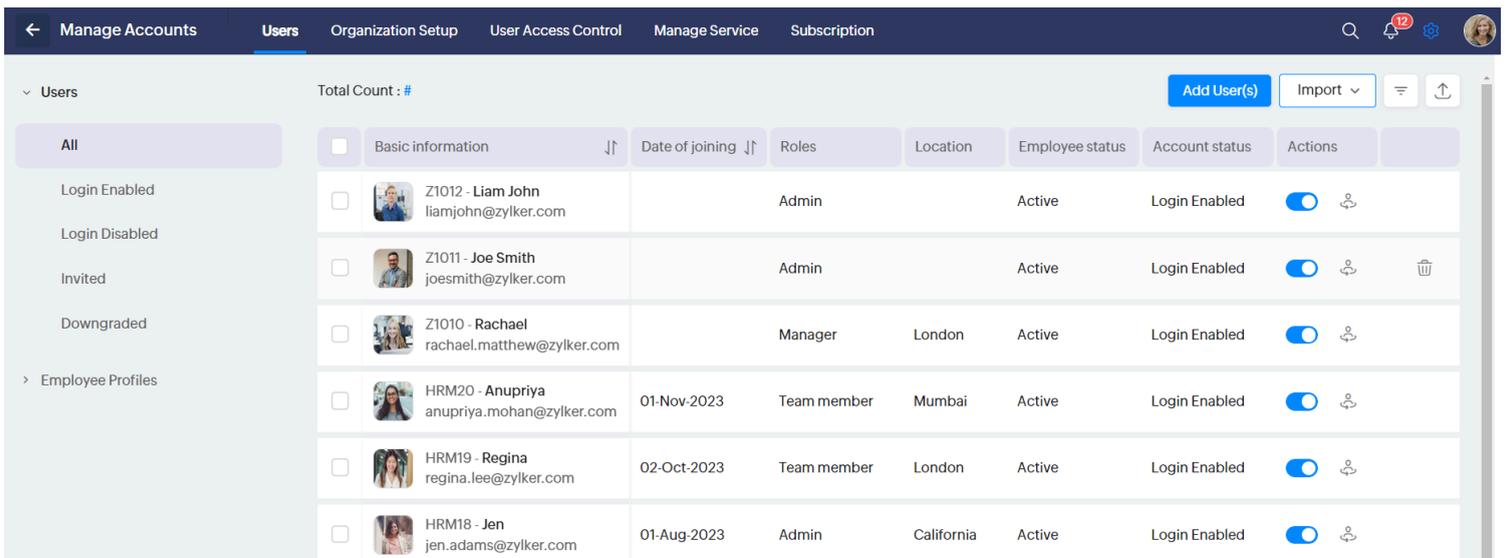


Watch our help video on employee profile management:

To add new users, Click on **Add User(s)** button in **Settings > Users > Users > All** tab. You can also add users from **Operations > Employees > Add Employees**. To learn more about Adding Users and the various methods of adding users, [click here](#).

"Employees" and "Users" in Zoho People represent the same individuals, with 'Users' denoting those employees who have been granted system access.

To add new Employee Profiles, Click on Add Employee Profile button in **Settings > Users > Employee Profiles** tab



The screenshot shows the Zoho People 'Users' management interface. The top navigation bar includes 'Manage Accounts', 'Users', 'Organization Setup', 'User Access Control', 'Manage Service', and 'Subscription'. The 'Users' section is active, showing a list of users with columns for 'Basic information', 'Date of joining', 'Roles', 'Location', 'Employee status', 'Account status', and 'Actions'. The 'All' tab is selected, and the 'Add User(s)' button is visible. The user list includes:

	Basic information	Date of joining	Roles	Location	Employee status	Account status	Actions
<input type="checkbox"/>	Z1012 - Liam John liamjohn@zylker.com		Admin		Active	Login Enabled	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Z1011 - Joe Smith joesmith@zylker.com		Admin		Active	Login Enabled	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Z1010 - Rachael rachael.matthew@zylker.com		Manager	London	Active	Login Enabled	<input checked="" type="checkbox"/>
<input type="checkbox"/>	HRM20 - Anupriya anupriya.mohan@zylker.com	01-Nov-2023	Team member	Mumbai	Active	Login Enabled	<input checked="" type="checkbox"/>
<input type="checkbox"/>	HRM19 - Regina regina.lee@zylker.com	02-Oct-2023	Team member	London	Active	Login Enabled	<input checked="" type="checkbox"/>
<input type="checkbox"/>	HRM18 - Jen jen.adams@zylker.com	01-Aug-2023	Admin	California	Active	Login Enabled	<input checked="" type="checkbox"/>

Watch our related help video on user addition methods:



Importing Users / Migrating Users into Zoho People

Zoho People 5.0 allows users to migrate employee data.

Navigate to Settings > Manage Accounts > Users > Import to import users.

Use the Download Sample Template option to preview and understand how data is to be imported into the Zoho People system.

Total License: 2000 | Employees added: 197 | Remaining 1803

Import data for:

Employee

Import based on:

Select



Drag and drop attachment here

[only xls, xlsx and csv formats are supported]

Upload File

Maximum upload file size is 5 MB.

[Download sample template](#)

Note:

Enter the mobile number with the country code (for eg: in India 91 is the country code, so the format should be 91-99478947XX)

Watch our related help video on migrating users into Zoho People:



User access control

Here, you can add and manage roles. Roles are the different tiers of users in Zoho People, such as Administrators, Managers, and Team Members. New roles can be added, and existing roles can be closed.

The **Administrators** tab lets you select and add users as administrators for different services offered in Zoho People. To assign service administrators, refer to [User Access Control](#).

← Manage Accounts Users Organization Setup **User Access Control** Manage Service Subscription

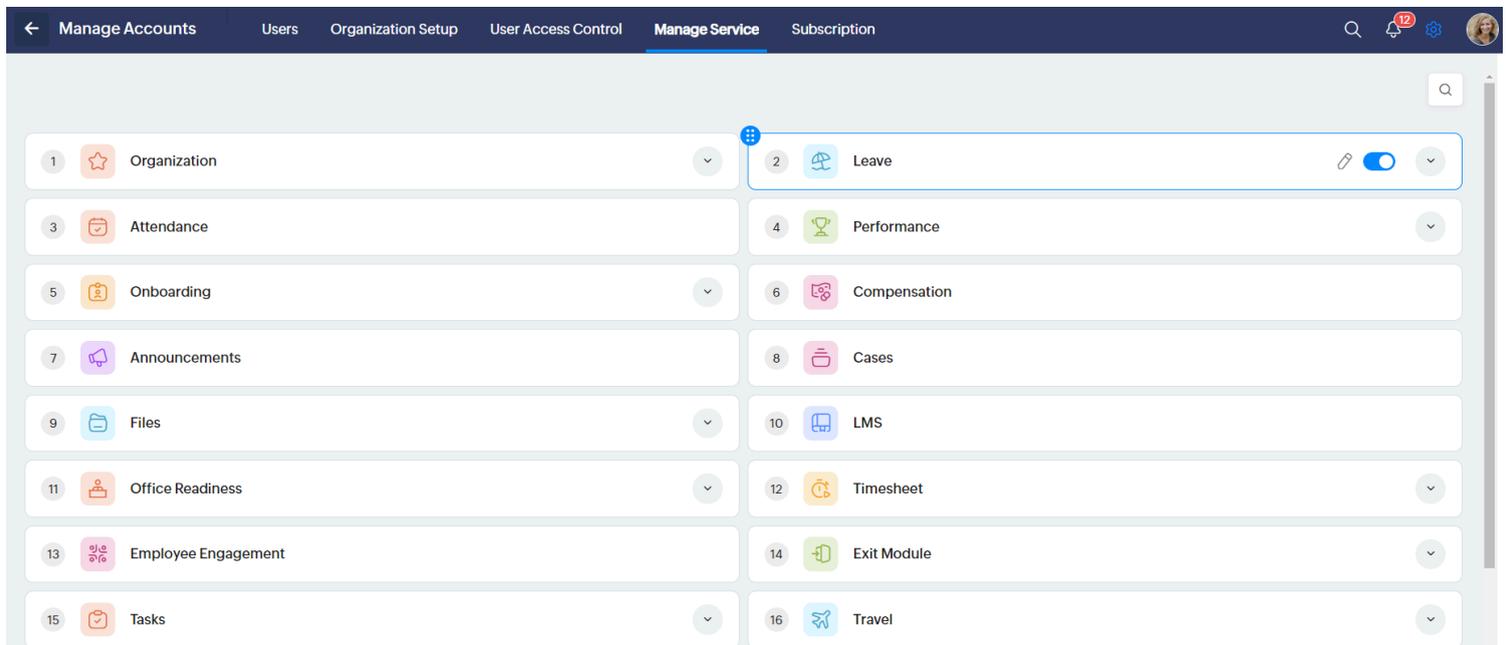
Roles Add General Role

- General Role
 - Admin
 - ZY198 - Christine Super Administrator +15
 - Director
 - Human Resource
 - No Users assigned to this Role
 - Team Incharge
 - No Users assigned to this Role
 - Team member
 - +120
- Specific Role
- Specific Role Assignment
- Function Based Permissions
- Administrator

Manager +
Team Lead
Trainee
No Users assigned to this Role

Manage service

Here you can enable or disable system and custom services.



Subscription

View details about your subscription and license counts. This page includes a link to manage your paid subscription. Also view your storage and API usage status. [Learn more](#) about Zoho People pricing and subscriptions. You can also close your Zoho People organization here. Click here to [learn more](#) about organization closure.

Dashboard

Files Usage

API Usage

Zoho One Enterprise Edition

Manage Subscription

Billing cycle - Yearly | Due Date - 27-Apr-2048

User licences

Count of employees with login access



Limit	Used
2000	162
Available	1838

Employee profile licences

Count of employees without login access



Limit	Used
10	10
Available	0

Forms

Count of custom forms



Limit	Used
100	66
Available	34

Reports

Count of custom reports



Limit	Used
3	3
Available	0

Company contact information

Account owner	Christine Spalding
Contact email	c.spalding@zylker.com
Company name	Zylker Group