Adding, Importing, Modifying, and Re-inviting Users

In Zoho CRM, a user is one who manages records, whether their own or those shared by other users, within the organization. In addition to accessing the CRM data, some of the users can perform administrative functions for the smooth running of the CRM account. As administrators, you can add users to the organization's Zoho CRM account, enabling your employees to carry out their day-to-day tasks independently.

Adding users in CRM is based on your editions and number of user licences. Each user can sign in to their account with an email address and password. Every user is given a role and profile. The profile determines what features a user is allowed to access and the role determines what data the user can access based on the organization's hierarchy.

Some of the add-ons and plug-ins in Zoho CRM need to be enabled for users before they can to access the feature, such as the mobile edition licenses, the Zoho Mail add-on, plug-in for Microsoft Outlook, and more. **See Also Manage Profile**

Availability

Permission Required

Users with Manage User permission in their profile can access this feature.

Check Feature Availability and Limits

Types of user profiles

Administrators: Users who can access the entire system. There must be at least one Administrator who can access all the data and features in your Zoho CRM account. Example: CEO or any top levels in the organization's hierarchy like top officials or top management.

Standard Users: Users who can access data according to their defined permissions (profiles) and roles in the organization. Example: Sales managers, marketing managers, support agents, etc.

Users with the **Manage Users permission** enabled in their profile can access the users' list and perform tasks such as adding users individually, importing multiple users, modifying and updating the existing user details, and viewing the apps and add-ons that are activated for each user. The details page of a user will also give you the information on the plug-ins and add-ons that are activated for the user. Make sure that you have created the appropriate roles and profiles before you add or import as these will need to be assigned to the users you add.

Points to Consider While Adding Users

1. Once the account is created, the super admin should confirm the account. If an user is invited before confirming, the invitation email will not be sent. The super admin should confirm the account and re-invite the user.

2. The Administrator adds a user by providing some basic details like name, email address, role, and profile.

3. You can also add multiple users by importing a file with details like name, email, address, role and profile.

4. When the users are added manually, the system automatically sends an email invitation to the user's email address . Other details such as phone numbers, address, photo, fax, website, date of birth, language, etc. can be entered after adding the user.

5. If the users are imported to the system, email invitations to the users have to be triggered manually by clicking the **re-invite button .** Other details such as phone numbers, address, photo, fax, website, date of birth, language, etc. can be entered after adding the user.

6. The users must accept the invitation by clicking on the **Access link** in the invitation email within 7 days of receiving .

7. After accepting the invitation, the user completes whichever of the following is applicable:

   - User is **new to Zoho** and **does not have** a Zoho account:
     - After clicking the access link in the email, the user will be redirected to the sign-up page.
     - User will sign up and create an account with Zoho.
     - On creating the account, the user should click the *Continue signing in* button.
     - The user has to confirm the email address by accessing the link sent in the confirmation email.

   - User **already has an account** with Zoho, but **does not have** a Zoho CRM account:

     - After clicking the access link in the email, the user should click the *Continue signing in* button.

     - The user will be logged in to the Zoho CRM account that is associated with the company's account.

Adding Users

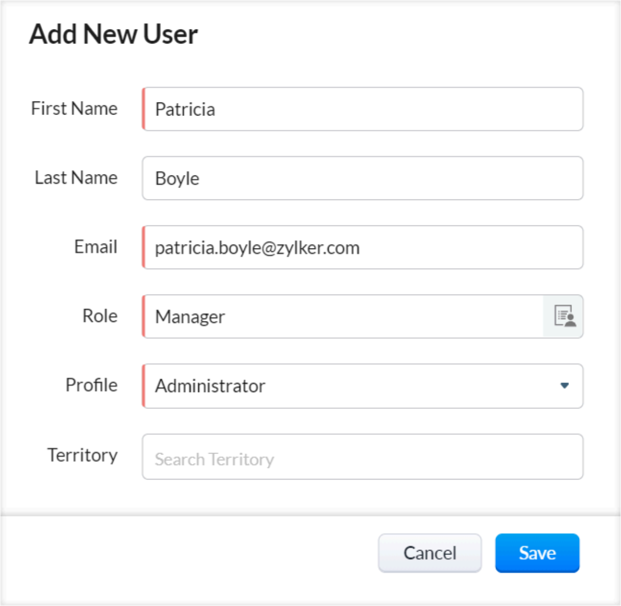
In the Free Edition, you can add upto 3 users. In the other Editions, the number of users that you can add is based on the user licenses purchased.

To add users

1. Log in to Zoho CRM with **Administrator** privileges.
   Users with *Manage Users* permission in their profile can also add users.

2. Go to **Setup** > **General** > **Users** .

3. In the *Users* page, click + **Add New User** .



4. In the *Add New User* page, enter the following details:

   a. **First Name** & **Last Name** : Enter user name.

   b. **Email** : Enter the user's valid email address that has not already been used to create a Zoho CRM account. An invitation will be sent to this email address.

   c. **Role** : Choose the role of the user in your organization.

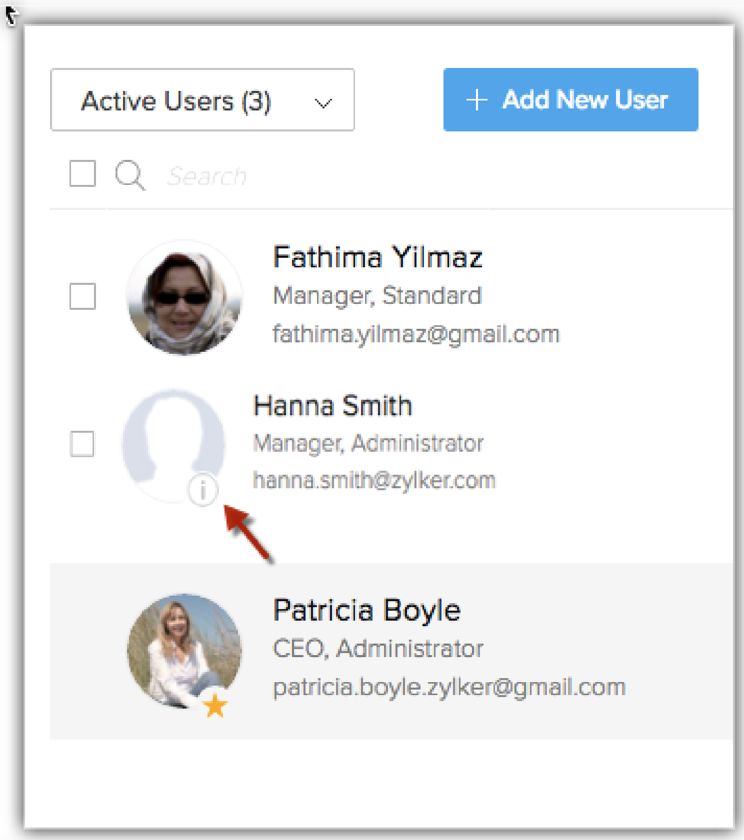
   d. **Profile** : Choose a profile that defines the user's access rights in your Zoho CRM account.
   You can add other details like phone numbers, address, photo, fax, website, date of birth, language, etc., after adding the user.

   e. **Territory** : Assign a territory for the user.
   This option will be available only if your enable Territories.

   It is mandatory to enter the *First Name*, *Email*, *Role* and *Profile* details .

5. Click **Save** .
   The system sends an invitation to the user's email address. Only when the user accepts the invitation, will the

status of the user change to *Confirmed* .



Importing Users

Importing Users is a convenient way to add multiple users into the CRM system or update information of the existing users. Users with *Administrator profile* or *Manage User Permissions* can import users into their org account

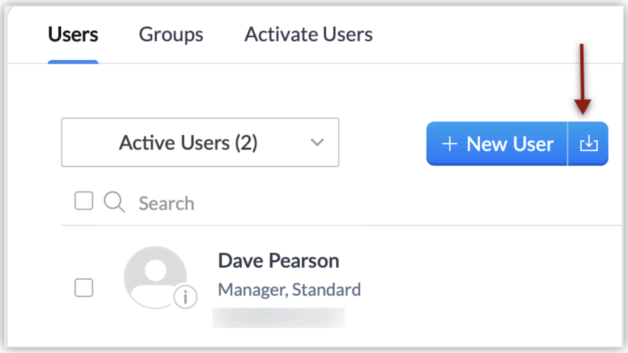
Supported Formats for Import : .xls, .xlsx, .csv
Import Limitations: A maximum of 1000 users can be imported at a time. However, the number of users that can be added to the CRM account depends on the number of user license purchased.

Note:

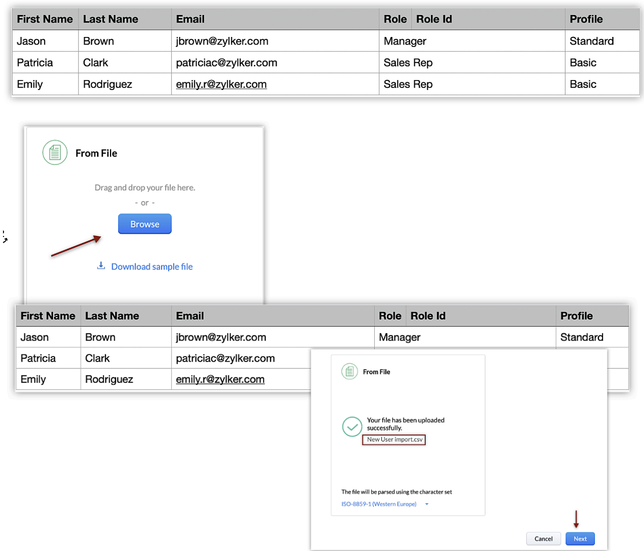
- During import, users are associated to the **Role** and **Profile** using *Role Name or Role ID and Profile Name or Profile ID.*
- Existing users can be updated based on the User ID or Email address.
- Once the users are imported, invitation mails are not sent to users. They need to be manually invited by clicking the **re-invite** button.
- Based on the subscribed CRM edition and the number of available user licenses, users will be imported. *For instance, if your CRM edition allows 3 users and you already have 2 users then only one user (the first user mentioned in the import file) will be added to the CRM account.*

To import users

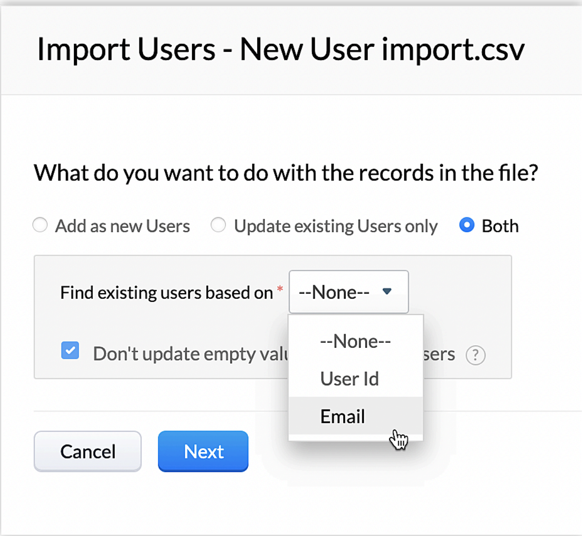
1. Go to **Setup** > **General** > **Users**.
2. In the *Users page* , click the **Import icon** near +New User button.



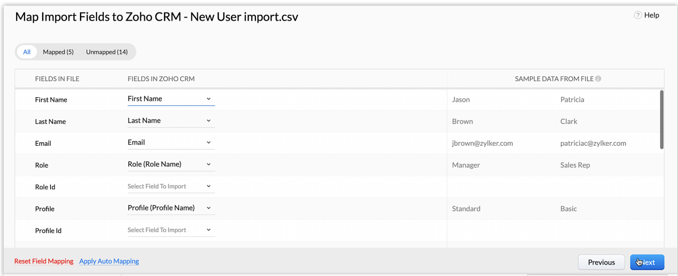
3. In the **Import Users** page, you can either **Drag and drop the file** , or **Browse the file** . You can also download a sample file to fill the user data and import it.



4. Click **Next** .
5. In *What do you want to do with the records in file?* , choose **Add as new user** or **Update existing users only** , or **Both** .
6. If you choose Update existing Users only or Both, then do the following:
   - In Find existing users based in, choose **User ID** or **Email.**
   - Check *'Don't update empty values for existing users'* to avoid overwriting of empty values for existing users.



7. Click **Next** .
8. Map the imported fields with the appropriate CRM fields
9. Click **Next** to finish the import.



See also : [Importing Data to Zoho CRM]
Based on the subscribed CRM edition and the number of available user licenses , users will be imported. For instance, if your CRM edition allows 3 users and you already have 2 users then only one user (the first user mentioned in the import file) will be added to the CRM account.

Note:
Data Center mismatch
While adding a user or importing users to your account, if the user's email address is already registered with a data center you will not be able to register it with another data center. For example, if Mr. John Parker is registered with email address john.parker@zylker.com in EU data center, you will not be able to add him in the US data center using the same email address.
However, you can add the same user to your account by using the options below:

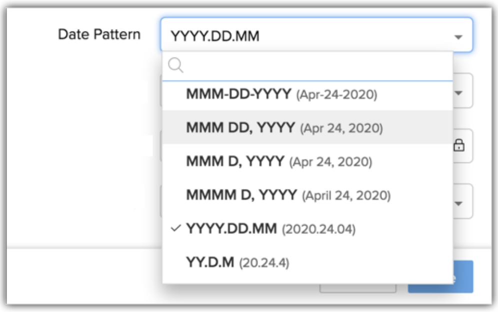
- Request the user to delete the registration with the existing data center and then add them to your account.
- Request the user to migrate his/her account to your organization's datacenter.

Modifying Users

When you add a user, you will start by be specifying only their name, email address, role and profile details. You can add the user's other details such as phone numbers, address, photo, fax, website, date of birth, language, etc., later, when you need.

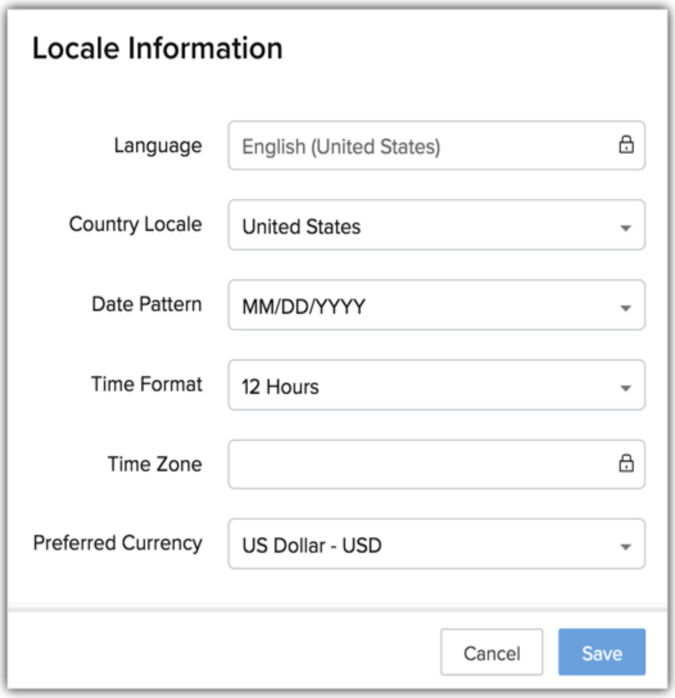
To modify a user's details

1. Go to **Setup** > **General** > **Users**.
2. In the *Users* page, select the user from the list to modify the user details or add more information.
3. In the *User's Details* section, click **Edit** for the corresponding section in which you want to modify the user's details. You can provide the following details:
    - **Phone** , **Mobile** , **Website** , **Fax** and **Date of Birth** : Enter contact and biographical information about the user.
    - **Address Information** : Enter the user's full address details.
    - **Language** : Set the language for the user's Zoho CRM account.
    - **Country Locale** : Select the user's country from the list.
    - **Date Pattern:** Select the preferred pattern of the date from the list of available options. (The date pattern will be populated based on the user's country locale which can be change based on individual's preference).



    - **Time Format** : Choose between a 12-hour or 24-hour time format.

- **Time Zone** : Set the time zone for the user's Zoho CRM account.

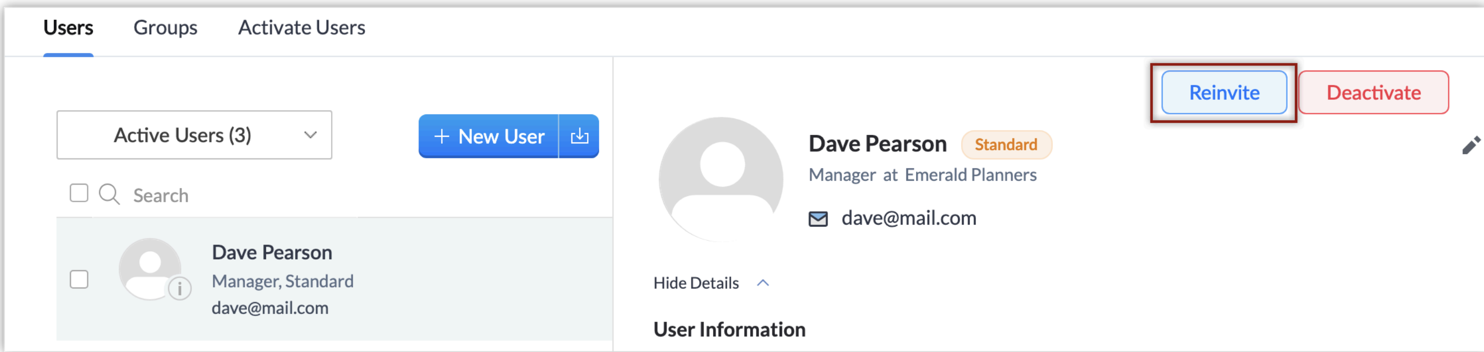


4. Click **Save** .

Re-inviting Users

Any user added manually will receive an email invitation with a link to join the CRM account .If a user does not accept the invitation sent by the Administrator within seven days, the administrator can resend the invitation to the users. Users who have not accepted the invitation to join the organization's CRM account will be listed under *Unconfirmed Users* . Here you can resend an invite only to the unconfirmed users. If the user is deactivated, you will need to activate them first. **See Also** **[Activate Users]**

Alternatively, if you import users through the import user functionality, the invite email using the Re-invite option has to be manually sent to each user.



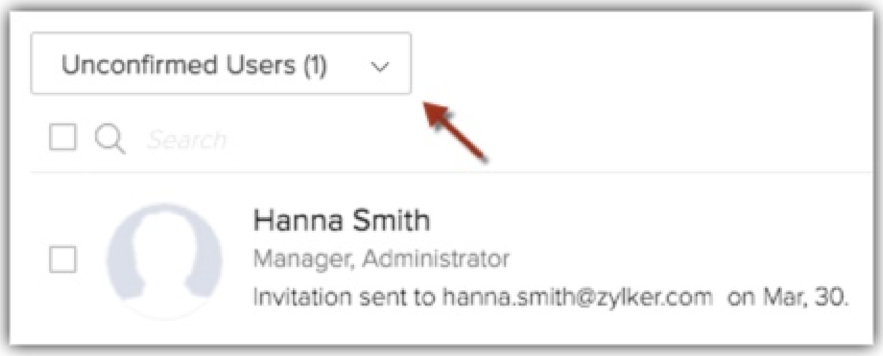
To re-invite a user

1. Log in to Zoho CRM with **Administrator** privileges.

2. Go to **Setup** > **General** > **Users**.

3. In the *Users* page, select the required user. In the *User's Details* section click Re-invite.

4. Alternatively, you can also go to the **Unconfirmed Users** view and select the user to re-invite. An invitation email will be sent to the user's email address.



Points to remember:

When you are invited to Company A's CRM account and...	What you need to do
You do not have an existing CRM account.	Click on the access link in the invitation email to join Company A's account.
You are already part of Company B's organization account.	Ask the Super Administrator of Company B's CRM account to delete you from that account. Then click on the access link in the invitation email to join Company A's account.
You are already part of Company B's organization account. Also, you are the Super Administrator in the same account.	In Company B's CRM account, make another user as the Super Administrator and ask the same user to delete you from that account. Then click on the access link in the invitation email to join Company A's account.
You are already part of Company B's organization account. Also, you are the only active user in the account.	Delete Company B's CRM account and then click on the access link in the invitation email to join Company A's account. In this case, Company B's Zoho CRM account will be closed and all the data will be securely erased. An email

	will be sent to you with a link to download the final backup of your data.
You are already part of Zoho Docs/Zoho Mail/Zoho Creator in Company B's organization account.	Ask the Administrator of Zoho Docs/Zoho Mail/Zoho Creator (of Company B) to delete you from the corresponding product's account. Then click on the access link in the invitation email to join Company A's account.
You are already part of Zoho Docs/Zoho Mail/Zoho Creator in Company B's organization account. Also, you are the Administrator of the account in these products.	In Company B's Zoho Docs/Zoho Mail/Zoho Creator account, make another user the Administrator and ask the same user to delete you from that account. Then click on the access link in the invitation email to join Company A's account.
You are already part of Zoho Docs/Zoho Mail/Zoho Creator in Company B's organization account. Also, you are the only active user in the account.	Delete Company B's Zoho Docs/Zoho Mail/Zoho Creator account, and then click on the access link in the invitation email to join Company A's account. In this case, Company B's Zoho CRM account will be closed and all the data will be securely erased. An email will be sent to you with a link to download the final backup of your data.

SEE ALSO

[Activate and deactivate users]
[Manage subscriptions]
[User layout - customization]
[Managing Profile Permission]
[Role management]