



Keyboard Shortcuts in Zoho CRM

Keyboard shortcuts are combinations of key presses that perform specific actions or functions within a system, allowing you to execute commands quickly and efficiently. Instead of using a mouse to navigate menus and click on options, keyboard shortcuts provide a faster alternative by utilizing various keys or key combinations.

Why we need Keyboard Shortcuts

Some of the tasks we perform in Zoho CRM can be done more quickly and efficiently if we use keyboard shortcuts. These shortcuts can save a substantial amount of time while multitasking. They also allow you to switch between tabs, screens, windows, and modules faster than with mouse navigation.

Keyboard Shortcuts in Zoho CRM

Zoho CRM has several built-in keyboard shortcuts, such as focusing or moving the cursor to the next field while entering data in forms. Additionally, Zoho CRM also provides configurable keyboard shortcuts. These keyboard shortcuts are categorized into three types:

- General
- Record Pages
 - Record's Create Page/Edit/Clone Page
 - Records View
 - Record Details View
- Switch Tabs

Keyboard shortcuts can be configured for the above-mentioned attributes. Zoho CRM has multiple default shortcuts provided for these features, which can be customized later based on your requirements. Frequently-accessed actions are included for shortcuts. The below table shows the actions that have keyboard shortcuts.

General	Record's Create Page/Edit/Clone Page	Records View	Record Details View	Switch Tabs
<ul style="list-style-type: none"> • Open Record Search • Open Help • Open Setup • Open Notification • Show/Hide Chat Box • View Shortcuts • Close Popup 	<ul style="list-style-type: none"> • Focus Next Field • Focus Previous Field • Move to Next Section • Move to Previous Section • Save • Save and New • Cancel • Switch Layout 	<ul style="list-style-type: none"> • Focus Next Record • Focus Previous Record • Open Record • Edit Record • Select Record • Delete Record • Show/Hide Advanced Filter • Show Custom Views • Select All Records • Create Record 	<ul style="list-style-type: none"> • Back to List View • Edit Record • Send Email • Call Now • Add Task • Log a Call • Add Meeting • Add Note • Add Appointment • Move to Next Record • Move to Previous Record • Go to Page's Top • Go to Page's Bottom 	<ul style="list-style-type: none"> • Home • Tasks • Meetings • Choose modules - and create your own shortcuts

Accessing Keyboard Shortcuts

To access keyboard shortcuts, navigate to **Setup > General > Personal Settings > Accessibility > Motor > Keyboard shortcuts**.

Keyboard shortcuts are disabled by default for all accounts. Users have to enable them manually. Once enabled, click **View Shortcuts**.

The built-in shortcuts cannot be modified.

← **Keyboard Shortcuts**

Reset shortcuts 

Keyboard shortcuts allows you to perform certain actions quickly.

General

- Open Record Search: /
- Open Help: Z, H
- Open Setup: Z, S
- Open Notifications: Z, N
- Show/Hide Chat Box: Z, C
- View Shortcuts: Z, /
- Close Popup: Esc
- Open Command Palette: C, C
- Open Voice Assistance: Ctrl, Z, V

Record's Create/Edit/Clone Page

- Focus Next Field: Tab
- Focus Previous Field: Shift, Tab
- Move to Next Section: Shift, ↓
- Move to Previous Section: Shift, ↑
- Save: Enter
- Save and New: Ctrl, Enter
- Cancel: Z, Esc
- Switch Layout: Z, L

Records View

Back to List View: Z, Esc

Once shortcut keys are enabled, the categorized shortcut keys are displayed in different sections. They can be used as they are defined, or they can be modified accordingly.

General

- Open Record Search: /
- Open Help: Z, H
- Open Setup: Z, S
- View Shortcuts: Z, /
- Close Popup: Esc

Record's Create/Edit/Clone Page

- Focus Next Field: Tab
- Focus Previous Field: Shift, Tab
- Move to Next Section: Shift, ↓
- Move to Previous Section: Shift, ↑
- Save: Enter
- Save and New: Ctrl, Enter
- Cancel: Z, Esc
- Switch Layout: Z, L

Switch Tabs

- Home: G, H
- Tasks: G, T
- Meetings: G, M

[Add shortcut](#)

Records View

- Focus Next Record: ↓
- Focus Previous Record: ↑
- Open Record: Z, Enter
- Edit Record: Z, E
- Select Record: Z, X
- Delete Record: Z, D
- Show/Hide Advanced Filter: Z, F
- Show Custom Views: Z, V
- Select All Records: Z, A
- Create Record: Shift, R

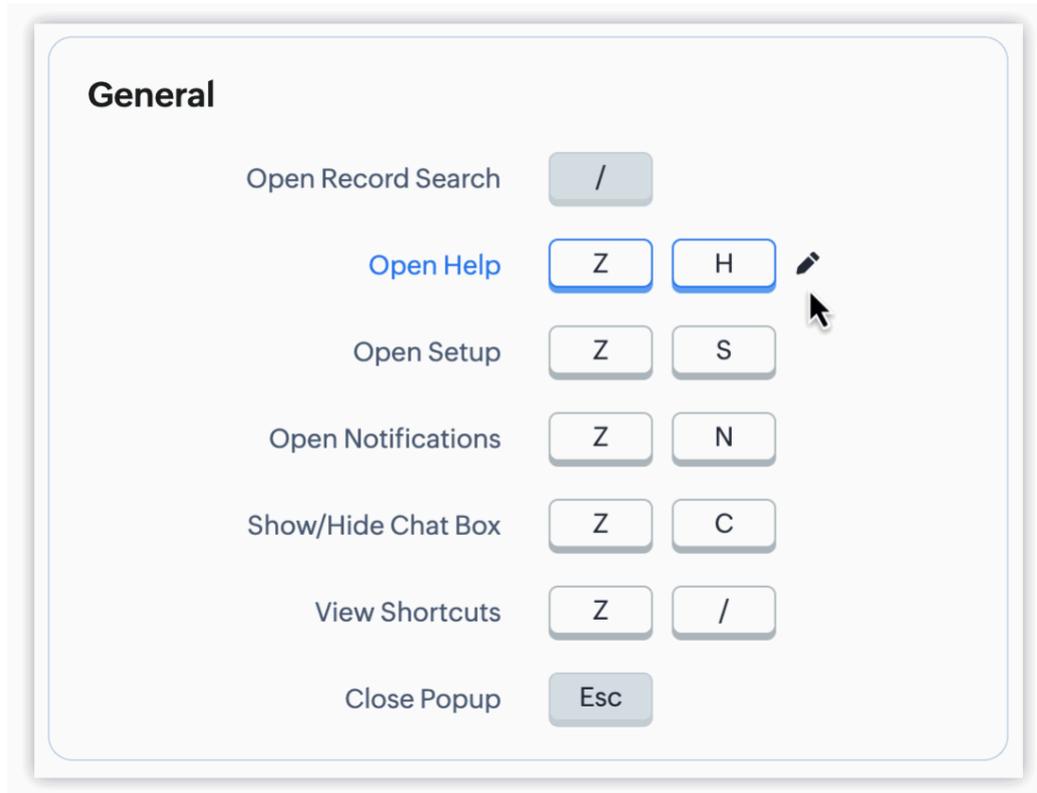
Record Details View

- Back to List View: Z, Esc
- Edit Record: Z, E
- Send Email: Z, M
- Add Task: Shift, T
- Log a Call: Shift, C
- Add Meeting: Shift, M
- Add Note: Shift, N
- Move to Next Record: Z, →
- Move to Previous Record: Z, ←
- Go to Page's Top: Z, ↑
- Go to Page's Bottom: Z, ↓

 **Note:** The built-in shortcuts will work by default, even when **Keyboard Shortcuts** is disabled.

Configuring Keyboard Shortcuts

When you hover on the list of shortcuts, the edit icon will display. Click on this to modify the shortcut key.



 To coincide with the shortcut for CRM Plus, we changed the default shortcut for record search from "alt"+"space" to "/".

A shortcut can contain a minimum of one key to a maximum of three keys. The keys are not case-sensitive. If you do not want a shortcut key for certain action, you can just leave the field empty. There are certain limitations for using certain keys, which are mentioned below.

Completely Restricted
U
Cmd Shift +
Ctrl Shift +
Ctrl Space
Cmd Space
Shift Space
Alt Space
Tab Space
Ctrl Shift Space
Ctrl Tab
Ctrl ArrowUp
Ctrl ArrowDown
Ctrl ArrowLeft
Ctrl ArrowRight
Shift Tab
Cmd Tab
Ctrl + T
Ctrl + W or Ctrl + F4
Ctrl + N
Ctrl + Tab or Ctrl + Shift + Tab
Ctrl + F
Ctrl + P
Ctrl + S
Ctrl + R or F5
Ctrl + Shift + R or Ctrl + F5
Ctrl + Shift + T
Ctrl + Shift + N
Ctrl + Shift + Delete
Command + T
Command + W
Command + N
Command + Option + Arrow Right/Left
Command + F
Command + P
Command + S
Command + R
Command + Option + R
Command + Shift + T
Command + Shift + N
Command + Shift + Delete
Ctrl + C
Command + C

Combination Restricted
Esc
Tab
Dead
Caps Lock
Home
End
Insert
PrintScreen
Pause
Page Up
Page Down
NumLock
ScrollLock
Context Menu
Backspace
Delete
AltRight
IntlBackslash
AudioVolumeDown
AudioVolumeUp
AudioVolumeMute
MediaPlayPause

The above combination of keys has been identified to create conflicts inside Zoho CRM, so it is better to avoid the above-mentioned keys while configuring shortcut keys.

To get a clear detail about keyboard shortcuts, let's look at a few examples.

- System shortcuts will be prioritized over any CRM shortcuts provided in this document. For instance, this would apply if a specific CRM operation required the CMD+SPACE key combination. When using this shortcut, we only launch spotlight, because the system shortcuts take precedence.

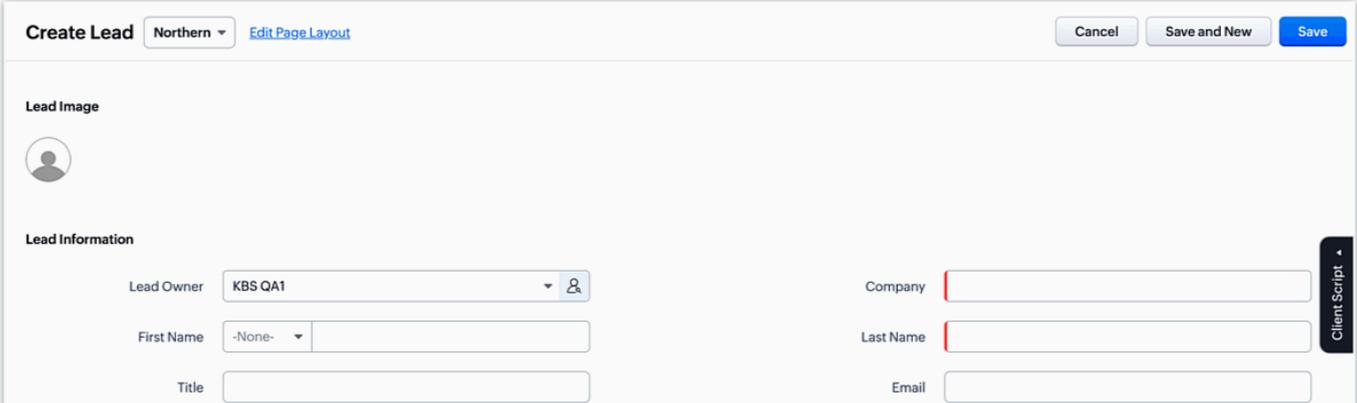
Scenario 1

Zylker Real Estates is a organization that has two layouts in their account. One layout handles customer details from the southern region and another layout handles customer details from the northern region. You are a user in Zylker, and you constantly have to shift between layouts while operating in CRM. Switching from one layout to another layout by navigating through the mouse seems a bit tedious. What if there were a simpler way to switch between layouts?

Yes, you can use the keyboard shortcuts to switch between layouts. Using keyboard shortcuts can save a lot of your time, and it also eases the process.

Solution: To create a shortcut for switching layouts, navigate to **Setup > General > Personal Settings > Accessibility > Motor > Keyboard shortcuts > View Shortcuts**. Under **Record's Create Page/Edit/Clone Page** section, navigate to **Switch Layout**.

Create the shortcut that you need for switching layouts, By default, the shortcut is Ctrl + I. You can configure your own shortcut if needed, or use the existing one.



Scenario 2

For just about any organization, there is a need for constant switching between modules.

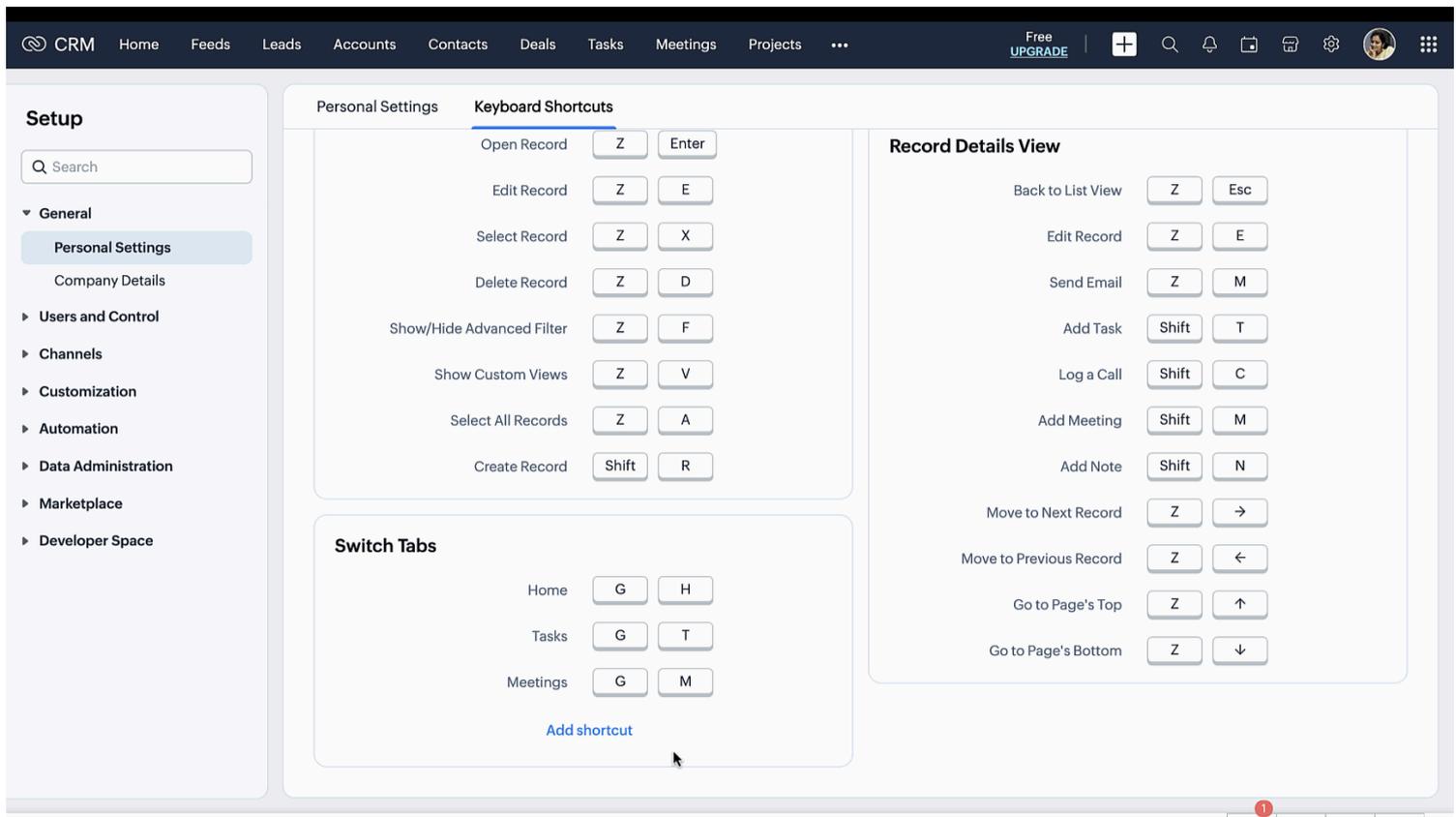
Zylker, a home services company, provides services like cleaning and renovation. Based on the service available, they will book the appointments, so there is a constant switch between the service and appointment modules. Doing so using a mouse might be tedious. What if we could switch from one module to another by simple keyboard actions?

Yes, you can switch from one module to another by using keyboard shortcuts.

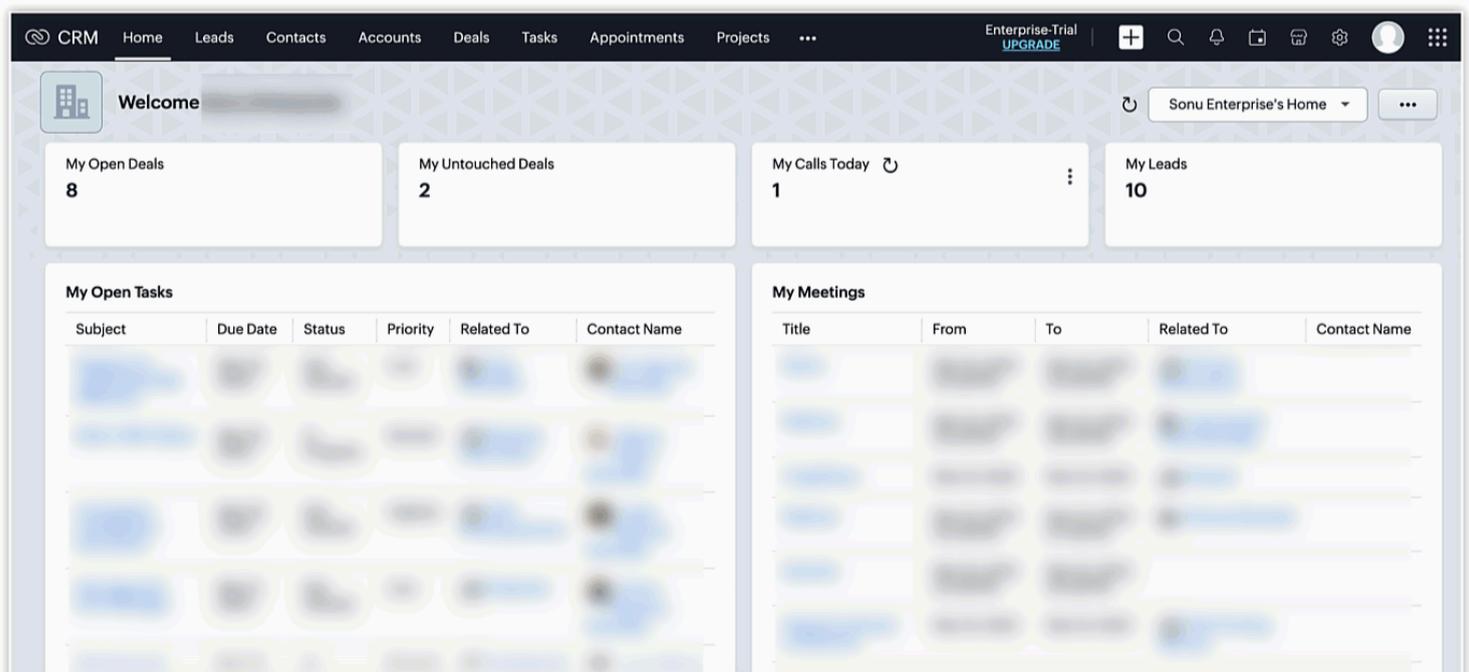
Solution: To create a shortcut for switching from one module to another module, navigate to **Setup > General > Personal Settings > Accessibility > Motor > Keyboard shortcuts > View Shortcuts**. Under **Switch Tabs** section, click **Add Shortcut**.

Zoho CRM provides a default shortcut only for Home, Tasks, and Meetings modules, which can be modified later. For other modules, user can create their own shortcuts.

A popup box will appear. Choose the module for which you need to create a shortcut, then configure the shortcut you need for switching to the particular module.



In this case, choose Service Modules, and configure the required shortcut. Next, do the same for Appointment Module, as well. After configuration, you can use those shortcut keys to switch to that specific module.



 The shortcut action for Home cannot be deleted. Additionally, the shortcut for modules is limited to a total of 25 modules.

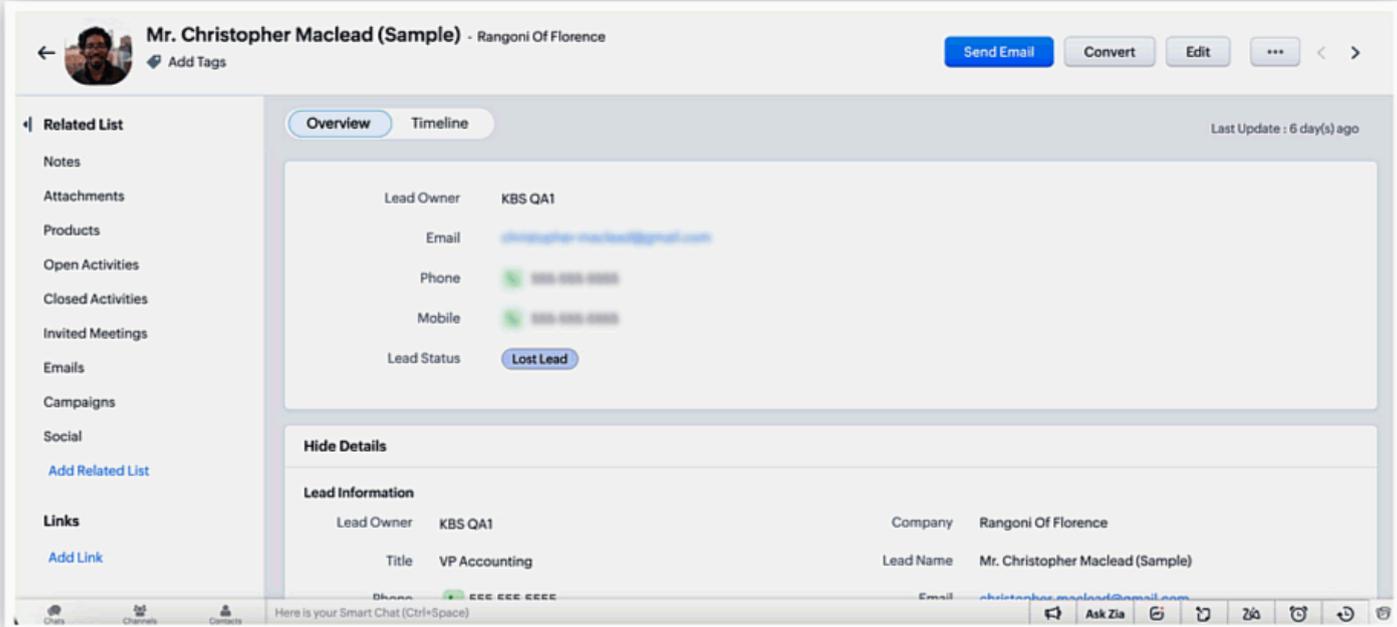
Scenario 3

For any organization, the sales representative has to follow up with customers regularly. One of the most commonly-used follow up techniques is via email. What if you could open your mailbox with just a click?

Yes, you can create keyboard shortcuts to open mailbox, once the shortcut key is configured you can email directly by pressing the keys on the keyboard.

Solution: To create a shortcut for sending a email, navigate to **Setup > General > Personal Settings > Accessibility > Motor > Keyboard shortcuts > View Shortcuts**. Under the **Record Details View** section, navigate to **Send Email**.

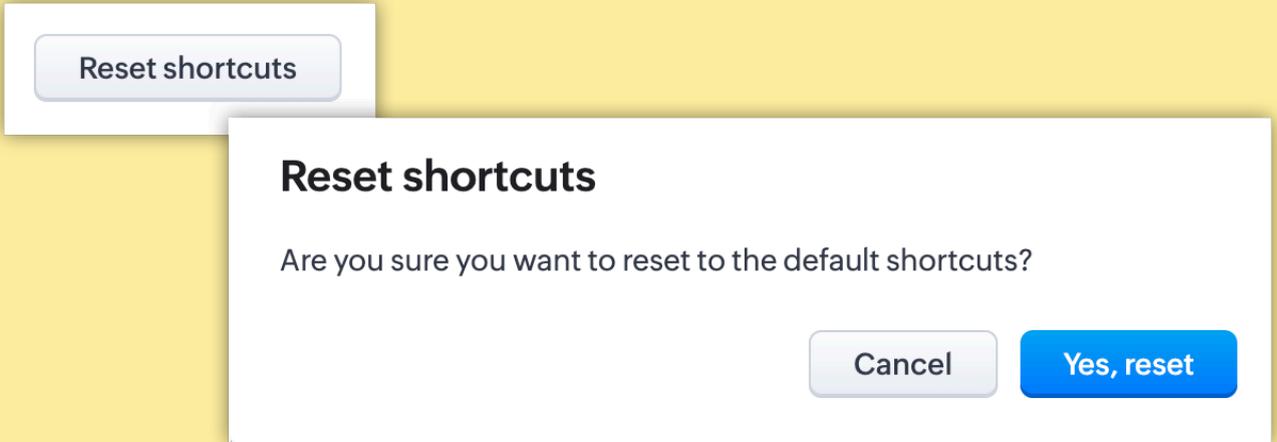
Configure a shortcut for opening the mailbox, or use the existing shortcut key.



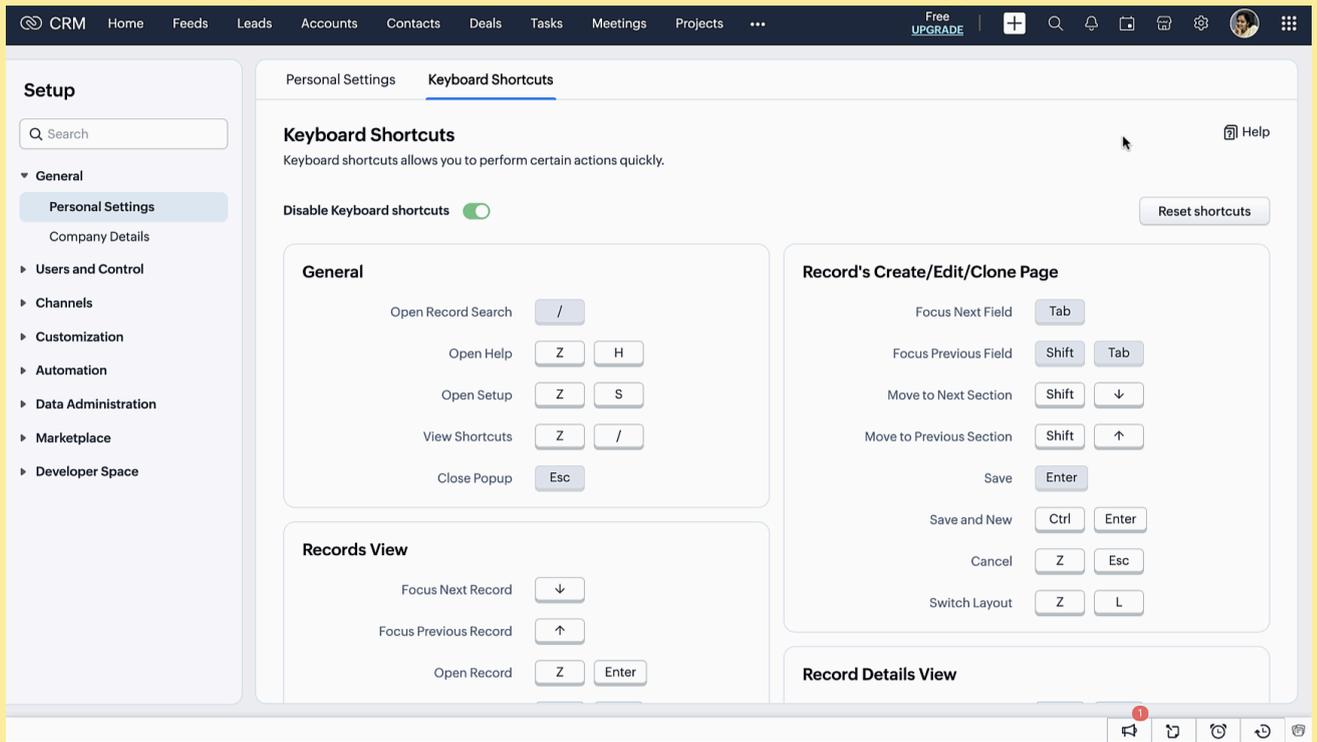
The screenshot displays a Zoho CRM lead record for Mr. Christopher Maclead (Sample) at Rangoni Of Florence. The interface includes a navigation menu on the left with sections for 'Related List' (Notes, Attachments, Products, Open Activities, Closed Activities, Invited Meetings, Emails, Campaigns, Social) and 'Links' (Add Related List, Add Link). The main content area shows the lead's details under the 'Overview' tab, including Lead Owner (KBS QA1), Email (christopher.maclead@gmail.com), Phone, Mobile, and Lead Status (Lost Lead). Below this is a 'Lead Information' section with fields for Lead Owner, Title, Company, and Lead Name. At the top right, there are buttons for 'Send Email', 'Convert', and 'Edit'. The bottom of the screen features a chat bar with the text 'Here is your Smart Chat (Ctrl+Space)' and a toolbar with icons for 'Ask Zia', search, and other functions.

Notes

- The shortcut created for Open Help only works only if the particular feature is connected to the help document page.
- You can always reset the shortcuts that you configured.



- You can also view all the shortcuts created, by pressing "Z and /", which is a default shortcut created for viewing the shortcuts. This can also be customized accordingly.



- Shortcut action for Show/Hide Chat Box is not supported in CRM Plus and Zoho One editions.

Limitations

- Projects, Desk, Marketplace, and other Integrated modules will not accept shortcuts.

- The standard English keyboard layout is compatible with the default shortcuts. You might need to reconfigure the combinations if the layout is modified. The shortcuts won't function unless the user edits that shortcut when the user language is switched from English to another language, or from another language back to English.
- You can avoid using the commonly-used shortcut combinations that are already assigned to browser or OS actions.
- The shortcut might not function if it has previously been assigned to an OS or browser action.
- Close Popup might not work for all the popups in Zoho CRM.
- The default list view and canvas view both support shortcuts. However, the kanban view does not. Shortcuts supported in standard detail view page layout are not available in canvas and custom views.
- The modifier keys (CMD, Ctrl, Shift, and Alt) should be used in combination with any other key. The user can't type these keys alone while changing the shortcut, it is accepted only if it is along with other keys.

Availability

This feature is available for all editions.