

Managing Multiple CRM Organizations

Access multiple CRM accounts using one sign-in

Zoho CRM allows users to access multiple organizational (CRM) accounts using the same email address. This is especially useful for organizations that maintain different CRM accounts to manage their business, such as a franchisee or a subsidiary.

For example, imagine a software company has two different business units under one company portfolio, each one has a separate customer base, marketing strategy, and revenue generation plans. Thus the company maintains two CRM accounts to manage sales and customer information. The CEO and management often have to log in to both accounts to understand business growth and derive insights which are used to prepare reports, agendas, and ideas for future planning. It can be difficult to remember different login credentials and broadcasting important data directly from the CRM accounts in a board meeting can become challenging.

To improve multiple account accessibility, Zoho CRM allows users to configure multiple orgs and manage them from one account with a common login credential. They can easily swap between the accounts whenever required. There are two ways a CRM user can be part of multiple org accounts:

- By creating org accounts
- By accepting invitations from other org accounts

❗ Please note that this feature does **NOT** provide any kind of data sync between the accounts. The sole purpose of creating multiple accounts is to provide users with ease of access to the different CRM organization accounts.

Creating multiple CRM organizations

CRM super admins and administrators both have the privilege to create multiple org accounts. This will allow them to log in to multiple accounts using a common login credential. Non-admin users can be invited to join these org accounts. They can accept the invitation and be part of multiple org accounts.

There are some key points that you must note before creating multiple org accounts:

CRM edition of the new org

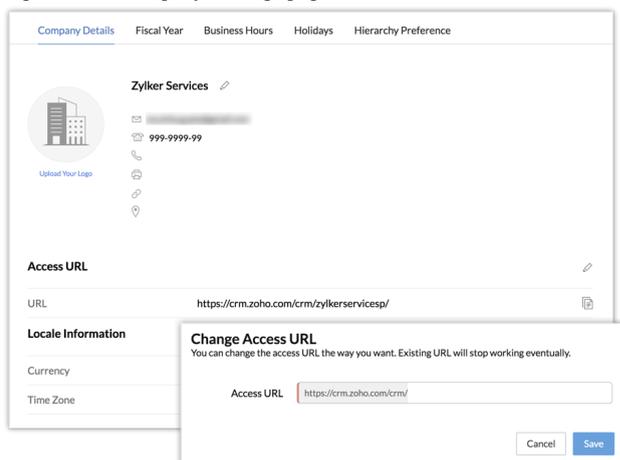
The new organization account that is created will always be set to the Enterprise trial edition by default. The administrator must upgrade to the required subscription before the trial ends. A user can be part of orgs that are in different editions.

User licenses for the CRM orgs

The user licenses must be purchased separately for each account. [Read more](#) about purchasing users' licenses.

Access URLs of the org accounts

Each account has a unique access URL which can be changed either at the time of account creation or later. The access URL can be changed only by the super admin of the org from the Company Settings page in the CRM account.



Privilege to create org accounts

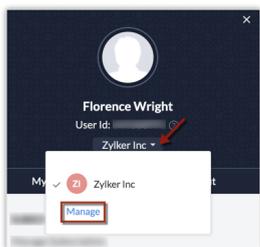
To create multiple org accounts, a user must be an admin or super admin in one of the CRM accounts. For example, if John is a standard profile user for Zylker Products and an admin for Zylker Services, he will be allowed to create accounts. However, if he has a standard profile in both the orgs, he will be restricted from creating a new account.

Number of accounts

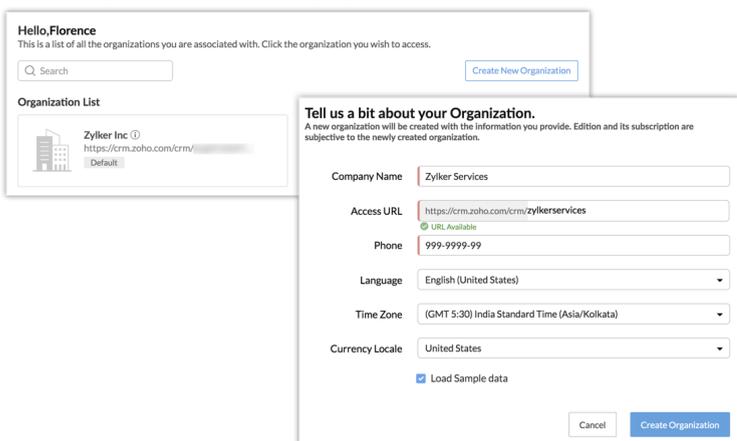
- Any user can be part of 10 accounts at a given point. These accounts can be in different editions (Standard, Professional, Enterprise, Ultimate, CRM Plus, or Zoho One).
- A user can only create ONE CRM Plus account and can be part of up to nine other CRM Plus accounts through invitations received from other CRM Plus orgs.
- A user can be part of only ONE Zoho One account and be part of other Zoho One accounts as an external user. [Read more](#) about external users.

To create multiple organizations

- Log in to your CRM account with administrative privileges.
- Click the **profile icon** in the top-right corner.
- In the profile pop-up, click the arrow next to the company name and click **Manage**.



- In the *Organization Listing* page, click **Create New Organization**.
- Enter the organization details: **company name, access URL, time zone**, etc.



- Check **Load sample data**, if needed.
This will populate some sample data in this new organizational account for you to work with and explore the CRM features.
- Click **Create Organization**.
You will be redirected to the CRM account of the new organization.

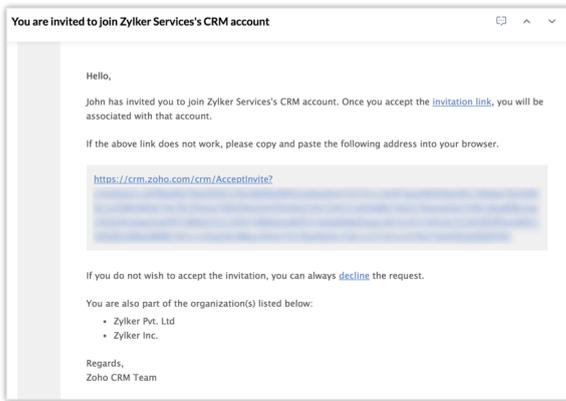
Sending invitations to users from different organization accounts

CRM users who are already part of a CRM account can be added and invited to multiple org accounts. They will be able to accept the invitation from another account without having to disassociate from your existing account. [Read more](#) about adding and inviting users.

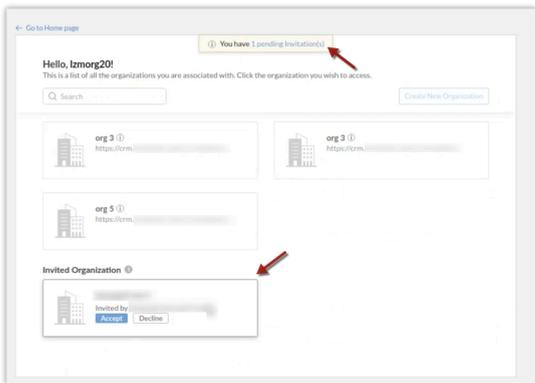
Accepting or declining invitations

The user can accept or decline the org invitation within 7 days from the following places:

- Email:** The email invitation that is sent by the host will have the option to accept or decline the invitation. If the user is part of other org accounts, those account names will be listed in the email.



- **Organization listing:** The user can go to the profile icon and click **Manage**. The list of Invited organizations will be available under **Organization Listing**.



❗ Invitations sent from CRM Plus and Zoho One accounts or any CRM account that has Cliq integration or IP restriction enabled will NOT be listed in the Organization Listings. Invited users can accept the invitations for these types of accounts ONLY from the invitation email they receive.

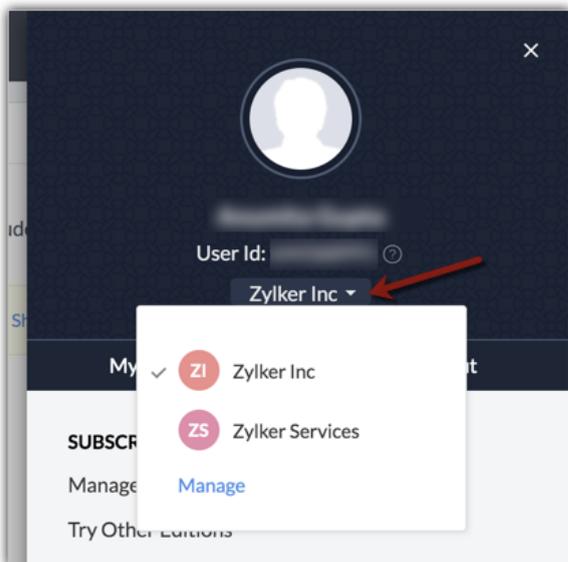
Managing multiple org accounts

Switching between accounts

Users who are part of multiple accounts can switch between accounts by clicking on the profile icon.

To switch between accounts

1. In your CRM, click the **Profile** icon.
2. Click the drop-down arrow next to the org name.
3. Select and click on an org of your choice.

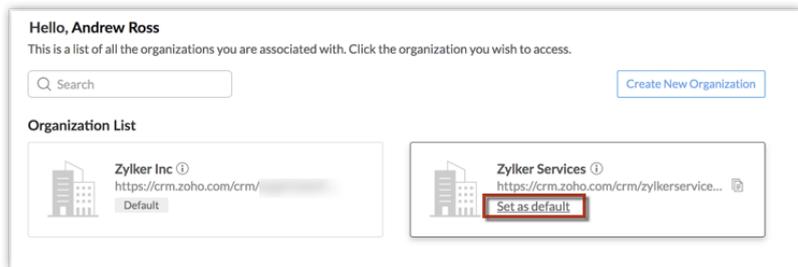


Setting an org account as default

The organization account from which the first account is created is considered the default org account. However, a user can set any account as the default org account. Setting a default account allows the user to land into that account whenever they log in to Zoho CRM. The user can also enter an organization's access URL to directly log in to that particular organization.

To set an account as default

1. Go to the **Organization Listing**.
2. Hover over the desired org account and click **Set as Default**.



Dissociating users from their default org account

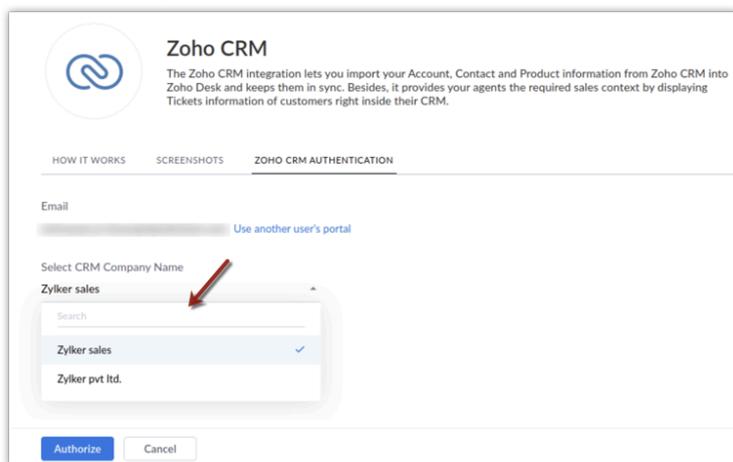
In case a user is dissociated from an account that is set as default by them or the default account is deleted by the admin or super admin, then upon next login, they can set another account as default from the organization listing.

Multiple org accounts and integration

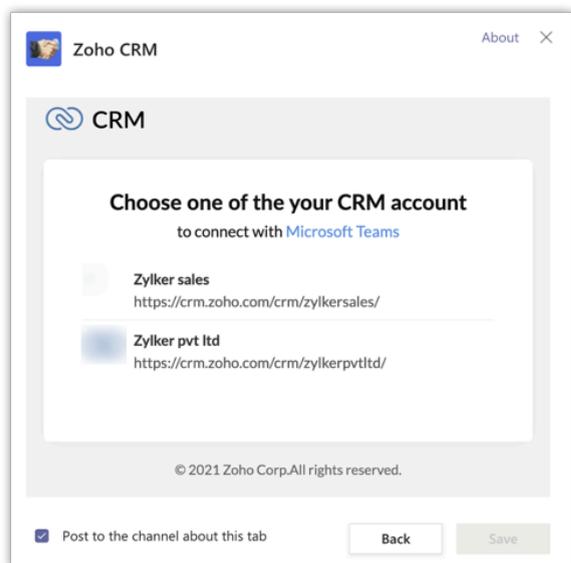
If you are using other Zoho products or any third-party applications that you want to integrate with Zoho CRM, you will be prompted to choose one of the org accounts during integration. The selected org account will be integrated with your application.

For reference, we have included screenshots from some applications to show the multi-org selection:

CRM - Desk integration (Desk UI)

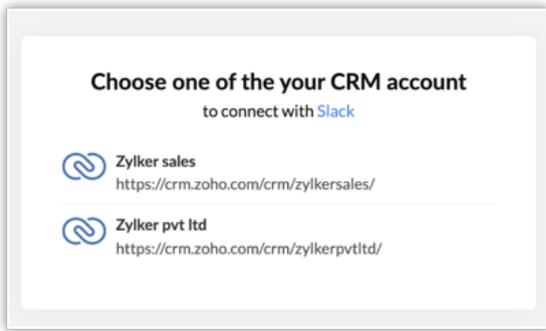


MS Teams-CRM integration (MS Teams UI)

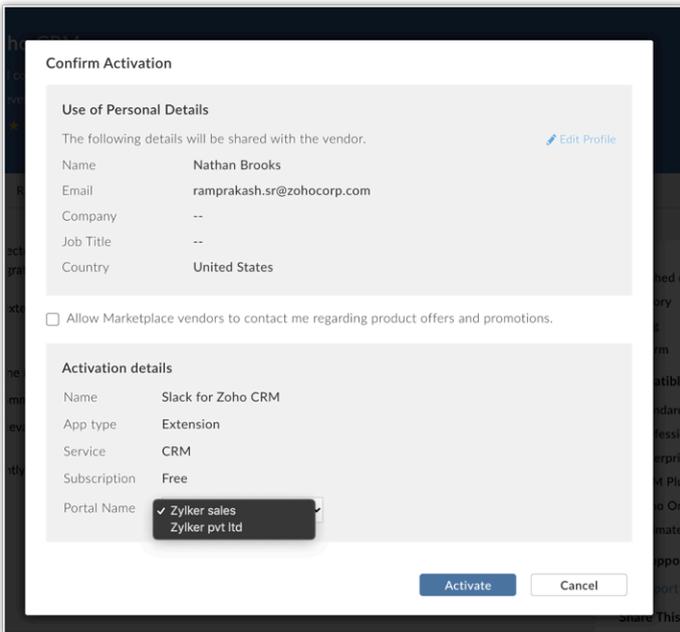


CRM-Slack integration

a) If the integration of Slack and CRM is enabled from Slack



b) If the integration was enabled from Zoho CRM Marketplace.



The table below highlights the way multiple org accounts will work with integrations:

Applications	Integration type
<ul style="list-style-type: none"> • Zoho Desk • Zoho Projects • Zoho Survey • Zoho Webinar • Zoho Backstage • Zoho Cliq • Zoho Meeting • Zoho Forms • Zoho Social, Zoho Finance 	One-to-one mapping. That is, only one org account can be associated with a Zoho Desk, Zoho Backstage, Zoho Cliq etc. portal.
<ul style="list-style-type: none"> • Zoho Campaign • Zoho Creator • Cisco Teams 	Multiple CRM org accounts can be associated with one Zoho Campaigns or Zoho Creator org and Cisco Teams.
Zoho Analytics	One report can be integrated with multiple CRM accounts.
Google and Office 365	One-to-one mapping. That is, one Gmail (contact or calendar) and Office 365 folder can be associated with one CRM account.
MS Teams	One-to-one mapping from MS Teams only. One portal from Teams can be associated with one CRM account. The integrations allow integrating of the following:

	<p>a. Tabs: Multiple tabs from different orgs can be configured to display CRM analytics. A tab can show analytics data from Org 1 while another tab can show from Org 2.</p> <p>b. Messaging Extension: One-to-one mapping where the user can map one org at a time. They can change the org whenever needed.</p>
Slack	One-to-one mapping. One Slack account can be associated with one CRM account.
Sales IQ	One-to-many mapping. That is, one CRM org account can be associated with up to five SalesIQ accounts.

Listed below is the platform from where a user can initiate integration:

From both CRM and Zoho app	Only from Zoho CRM	Only for other services
<ul style="list-style-type: none"> ▪ Zoho Desk ▪ Zoho Backstage ▪ Slack ▪ Zoho Campaign ▪ Zoho Analytics ▪ Sales IQ ▪ Zoho Meeting ▪ Zoho Forms 	<ul style="list-style-type: none"> ▪ Zoho Projects ▪ Zoho Survey ▪ Zoho Webinar ▪ Zoho Cliq ▪ Cisco Teams ▪ Google ▪ Office 365 ▪ Zoho Social ▪ Zoho Creator 	<ul style="list-style-type: none"> ▪ MS Teams