Design Validation Report for Buttons

Report Prepared by : Vignesh Gnanasekaran Report Date: November 25, 2019.

Metadata	Metadata Input
Research Tagline	Design Validation for buttons
Activity Purpose	 The purpose of this study is to make the buttons meaningful and then keep them consistency across the product. We have some major problems are listed below "+" Playing the major role in add/create buttons and some other places too. Button literals are different from the action (Not conveyed the same meaning as what action does) There is no different from the primary and secondary buttons in some places. Misaligned buttons. Lot of duplicates & similar styles in the buttons.
Platform	Zoho CRM Web
Key Performance Metrics	Validate the buttons are actually able to convey the action message to the user or not. Validate the buttons connection between the action and the functionality is the same. Validate the buttons that user can able to identify the action buttons in the page/popup/dropdown/conditions etc.,. Validate the button styles based on the priority, and keep them all focused depends on the priority. The study will also provide us with: Metrics: Objective and behavioral performance data that provides a usability baseline to measure improvements. Audience insights: Actionable insights on how to optimize the user experience for our users. Actionable improvements: Concrete recommendations for improvements based on research findings.
Research Requested by	Dayanithi (CRM Visual Leadership staff)
Report Complied by	
Report Compiled date	November 25, 2019

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Pain Points:

- 1. +Menu is repeated in all the menus (One action repeated in all the places)
- 2. Save and Close placed next to save.
- 3. Different header is used here.

Solution:

- 1. Instead of showing +Menu in all the places we can show the Add menu when users hover on the particular menu.
- 2. As a user when I completed my work and I press the save button the expected behaviour is close the window and back to normal view. But unfortunately it's not close because the save and close placed as a secondary button. As a user I'm expecting the usual behaviour to view the normal mode but it's not happening here. Do we really need this two button here? My point is to keep the two buttons. Save and cancel is enough for this page instead of three.
- 3. Need to use the usual header(White) so that we can avoid the new style (fill white) here.

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Solution: 1. We need to Conclusion:	use "Add Acc	ount" as action here.		

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Pain Points: Here the shift hours newly created but we use the different literals "new shift hours". Solution: So the call to action should be "Create New Shift Hours"	
Conclusion:	

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Pain Points: A si	imple "+New" button not	convey the	e exact action.	
Solution: Need t	o change the +New butt	on as Pre	configure questions.	
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Pain Points: 1. +New use 2. +Add action	r - Here the actual functionality is invon in twitter.	iting the new user.	
Solution: 1. As a user User/Invite	I'm actually inviting a new user to the e Team.	e zoho CRM. So here action button should be Invite	

2. +Add button should be add account

Page Name : Add	l New User					
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Pain Points: The	functionality is Inv	viting the ne	ew user.	But it shows ad	Id the new user.	
Solution: Need to	change the title a	as Invite ne	w user a	nd the action b	utton should be Invite in	stead of save.
Conclusion:						

Page Name : groups			
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Marketplace	Vignesin G	▶ _	
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	Save		
Pain Points: As a user I'm What are we doing here, cre	create the new group eating? Or adding? de	b. But what is the purpose of having a "New group' elete?	' alone?
Solution: Need to change to detail page should explain the should be Create/Create Greate/Create Greate/Create/Create Greate/C	he call to action as "C he same message. S roup.	Create New Group". When user click the Create new Group of the title should be "Create New Group" and the	ew group the call to action

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lome Leads Contacts My	Jobs Accounts Deals Activit	ties Reportyt Analytics Products Quotes			Q 🛱 + 🖻 ⊠ 🛠 🌘
tup	Users Groups Activate	Users			
arch Q	Activate Llsers				(2) Help
	This page allows you to activate a	nd deactivate users. Note: your organization cannot	have more active users than use	r licenses.	() (telp
ieral		, ,			
rs and Control	FULL NAME	EMAIL ADDRESS	ROLE	PROFILE	USER STATUS
Users	Prakash Sekar	prakash.sekar@zohocorp.com	CEO	Administrator	
Territory Management	User1	ganeshnow+1@yahoo.com	CEO	Standard	
Security Control	User3	Deactivating a user's account does not reduce the	e number of user license your	andard	
Compliance Settings	User4	company is billed for. You must manage your subs license.	scription to cancel a paid user	andard	
Customination	Mathew Robinson	If you want to reduce the number of user licenses	Click here	andard	
own Customization	closed user test			andard	
omation	Carol Mackey	Close		andard	
ess Management	Suzanne	user.salesman+invite3@gmail.com	CEO	Standard	
Administration	invitation test	user.salesman+invitation@gmail.com	CEO	Standard	
ketplace eloper Space	Mandy invitation testinvitation testinvitation	incrediblyspecial+invite@yahoo.com	CEO	Standard	
nnels	Sreekanth	srk1084@gmx.com	CEO	Standard	
a	PM	user.salesman+pm@gmail.com	CEO	Standard	
	Bala Ganesh	user.salesman@gmail.com	CEO	Standard	
	Bryan Paul	loginname2@zoho.com	CEO	Standard	
	Peter Parker	loginname3@zoho.com	CEO	Standard	0
Chennels Contacta	Here is your Smart Chat (Ctrl+Space)			Illuctostar	🖳 Ask Zia 🏔 🕽 🏹
	vickey_invitation.ai			nustrator	
N Points: Whe	n I click the user	status its activated. And	d when I turn o	ff the active r	node the popup com
is one of the i	mportant messa	ges but it's not look like	important or it	s not readabl	le. First time I skip th
an info next tin	ne only I ready th	he information clearly	F		F
		ie mornation cleany.			



- 1. The button actually create the new territory but it looks like adding one.
- 2. Why do we need to expand all & collapse all button here?

Solution:

- 1. The button should be "create new territory"
- 2. As a user I can able to see the territory hierarchy at all the time. That's the purpose of visiting here. If I can able to add multiple territory means I can able to hide one and view another. But here I can see only one territory so there is no need of expand/collapse.

Page Name : Territory settings			
Territories Territory Rules Assign Territories			
Territory Hierarchy			? Help
New Territory Expand All Collapse All			View Settings
Don Bosco	Territory Settings		
E CEO Vignesh G	Territory Structure	From Role Hierarchy	
Manager Prakash Sekar	Created By	Prakash Sekar Apr 11, 2019 12:03 PM	
i sample ter Vignesh G	Deal Territory Rule	Disabled	Enable
Territories Territory Rules Assign Territories Territory Hierarchy New Territory Expand All Collapse All	De Fachie Deel Terine	. Dula	⑦ Help View Settings
🖂 Don Bosco		, Kule	
CEO Vignesh G	All your Deal will be re-as rules already configured.	signed with territories based on the [Jeals territory
sample ter Vignesh G	I Understand. Enable No	w. Cancel	
			_
Pain Points : Unexpected popup behavior.As a user I can se comes in the same place.	ee all the popup	at the top but sudder	ily this action
Solution: All popup should be placed on the top and should	follow the popul	o/alert/info style.	
Conclusion:			



Page Name : Vie	w Parent Terr	itory	
É Chrome File Edit View	History Bookmarks People	Window Help	📴 🎯 🕻 🛆 🖇 奈 🔹 68% 🗊 Sat 7:31 PM Q 😑
🔴 🖲 🌒 🍙 (46) - 😵 (1) Zo 🖽	Cliq - 🛛 🔟 How t 🗍 🖽 Buttor 😥	Zc 🗴 😥 Zoho 😥 Zoho 😰 Zoho 🖸 YUVA 🝸 - Mes 🎯 Searc 🎯 Dribb	bbi 💩 Add ic 🧰 Noun 🛛 G salest 📴 Use P 🗿 Amaz 🕷 Apple 🖉 (745) 🕇 🕂
\leftrightarrow \rightarrow C \cong crm.zoho.com/crm	m/org687371934/settings/territor	es/create	* O 🗢 2 🙀 🕹 🗶 🖍 🕅 🗔 🥺 💿 🙆 🔒 🗄 🗄
🗰 Apps 🗎 Zoho 📄 Design Ref [Imported From Fir 🔇 Order Fi	ow - Eagl 🍌 Highcharts demos 👿 10 rules for better 🚺 Data Tables Desig	🎓 Design Systems G 👩 Design Starter Kit 🛐 Dropdown Sema » »
\equiv Home Leads Contacts	My Jobs Accounts Deals	View Parent Rules	×
Setup	Territories Territor	Don Bosco	
(Second Color	Create Territory	sample ter	(7)
Search	To automatically assign		×
General	Territory Name	Account Rule	
Users	Territory Manager Ass	2. AND 44 is ffgkhl	
Territory Management	Parent Territory san	Criteria = (1 and 2)	
Security Control	Add Users U	Pattern	
My own Customization	Permissions Rea		
Automation			Cancel
Process Management			
Data Administration	Account Rule		View Parent Rules
Marketplace	(1) 49 ×	is ₊ trrhe5dkfgyu	+
Developer Space			
Channels	Description	6	
feaga			
	Create		
Dotts Channels Contacts	Here is your Smart Chat (Ctrl+Space)		
	- new j_nmanakai		
Pain Points: Whe	en I click the "v	iew parent rule" I got this popup. Info	formation with cancel button and close icon.

Solution: we should follow only one action to close the popup. It should be close or it should be "done". We don't use close icon for all the popup, we use buttons on the popup all over the place.

Page Name : Terr	itory Rules	
É Chrome File Edit View Hi	story Bookmarks People Window Help	📴 🎯 🎜 🔏 泠 🐠 64% 🔟 Sat 7:41 PM 🔍 🚍
	a- M How t E Butto Z c x Z Zoho Zoho Z Zoho Zoho Zoho Zoho Zoh	rUVA Image: Search in the
Setup	Te Edit Rule Manager	jgstehtrhhfsrtn + Savo Cancel
Users and Control	□ -Don Bosco	
Users	E -CEO	
Territory Management	-Manager	
Security Control Compliance Settings	Account Rule 1. 102 is hglafaojojgstehtrhhfsrtn	
Automation Process Management	Criteria = 1 Pattern 1	
Data Administration	sample ter	
Marketplace	-rthydtjktukyf	
Developer Space	Isnglbxdkjgbkjznd	
- Channels feaga		
Cheta Chernels Contacti	Here is your Smart Chat (Ctrl+Space) vickey_invitation.at	
Pain Points: Unex options on the left	pected button style. I can see all side.	the primary actions at the right side and the secondary
Solution: Button p cancel button shou	lacement should be changed in t Ild be left side.	he usual style. Save button should be on the right side and
Conclusion:		

Territories Territory Rules Assign Territories	
Assign Territories to Accounts	⑦ Help
Assign or reassign the territories to the Accounts using the Run Rule option. Search your Accounts as needed and run rules for them.	
My own criteria 🔻	
1 <u>None *</u> <u>None *</u> +	
Search	
Territories Territory Rules Assign Territories	
Assign Territories to Accounts	? Help
Assign or reassign the territories to the Accounts using the Run Rule option. Search your Accounts as needed and run rules for them.	
Territory 💌	
Search Territory	
Search	
n Points : Search? Here the description is too length so I skip that but I unders ount to run rule. But here I can see only search button.	tand I have to select an
ution: The button should be search account. So that user can able to understa	and that we can select the

Page Name : Sec	urity control - Prot	files				
\equiv Home Leads Contacts M	ly Jobs Accounts Deals Activities	Reportyt Analytic	s Products Quotes ***		Q 🗘 + 🖻) 🖂 🛠 🎯
Setup	Profiles Roles Data Sharin	g Settings Zoho Ma	ail Add-on Users			
Search Q	Profiles					Help
General	Profile is a set of permissions dealin	g with module access a	and operations, setup customizations, and access to va	rious apps. You can provide different	t	New Profile
Users and Control	set of permissions to various users.					
Users	PROFILE NAME	PROFILE DESCRIPT	ION	CREATED BY	MODIFIED BY	
Territory Management	Administrator	This profile will h	ave all the permissions. Users with Administrat More		Sep 23	
Security Control	Standard	This profile will h	ave all the permissions except administrative pr More			
Compliance Settings	vickey 2			Sep 3	🚯 Sep 23	
My own Customization	sf	dd		Sep 17	🕄 Sep 17	
Automation	vickey New			Sep 23	Son 23	
	ly Jobs Accounts Deals Activitie	Create New I	Profile	_		
Satur	Profiles Roles Data Shari					
		rione ruane				
Search Q	Profiles	Clone Profile	Administrator •			⑦ Help
General	Profile is a set of permissions deali set of permissions to various users	Profile Description	4	us apps. You can provide different		New Profile
Users and Control						
Users	PROFILE NAME		Cancel Create	CREATED BY	MODIFIED BY	
Territory Management	Administrator				🕼 Sep 23	
Security Control	Standard	This profile will he	ave all the permissions except administrative pr More			
Pain Points: Here	i'm creating a profi	le but the c	call to action is simply "Ne	w profile"		
Solution: CTA she	ould be Create new	profile				
Conclusion:						

Page Name : Securit	ty Control - Pr	ofile			
≡ Home Leads Contacts My Jobs	Accounts Deals Activitie	es Reportyt Analytics	s Products Quotes •••		५ ८ै + छ ⊠ % 👰
←Profile: Bigilueeee					Clone View Users
MODULE PERMISSIONS Basic Import/Export Send Email Tools Others SETUP PERMISSIONS	Basic Permissions Leads Contacts Accounts Deals Tasks	 View, Create, Ei 	dit, Delete		⊙ Help
E Home Leads Contacts My Jobs ← Profile: Bigilueeee MODULE PERMISSIONS Basic Import/Export	Accounts Users in Bi Basic Per Leads	igilueeee profile	DLE STATUS No users found	×	Q 🗳 + 🖻 🖂 💥 🚱 Cione View Users © Help
Send Email Tools Others = Home Leads Contacts My Jobs	Contacts Accounts Deals Accounts Deals Activiti	e		_	Q 🗸 + 🗉 🛛 💥 🚱
←Profile: Bigilueeee	_	Profile Name	rofile		Clone View Users
MODULE PERMISSIONS Basic Import/Export Send Email Tools Others	Basic Permissions Leads Contacts Accounts Deals	Clone Profile Profile Description	Bigilueeee Cancel Cre	A Nate	ී Help

Pain Points:

- 1. Here I can not able to see the Primary action. I don't know how to save these changes. And there is no information about auto save.
- 2. When I click View user I can see there is no users in this profile, But where can I add the users? There is no option here and I don't know how to add the user here.
- 3. When I click clone it ask me to create a new profile. Is it really a clone this profile or creating new profile?

Solution:

- 1. The primary and secondary action "Save" cancel should be on this page. We don't use auto save for other features so here we should follow the same.
- 2. As a user I'm expected to view the user and I can see there is no users in this profile. But I need an option to add users from here. So we need to have the button for "Add users" here.
- 3. The popup should have a clone profile title and the call to action should be clone profile.

Page Name : Rename	e & Delete		
	Accounts Deals	Are you sure you want to delete the profile Bigilueeee ?	Q 🛃 + 🖻 🖂 💥 🚱 Clone View Users 🚥
MODULE PERMISSIONS Basic Import/Export Send Email Tools Others SETUP PERMISSIONS	Basic Permissions Leads Contacts Accounts Deals Tasks	 View, Create, Edit, Delete ~ 	⑦ Help
E Home Leads Contacts My Jobs ← Profile: Bigilueeee MODULE PERMISSIONS Basic Import/Export Send Email Tools Others SET UR DEDMISSIONS	Accounts Deals Basic Permission Leads Contacts Accounts Deals	Profile Name Bigilueee Profile Description Cancel Save	Q Clone View Users () Help
Admin Level	Tasks	View, Create, Edit, Delete Y	

- 1. Delete popup is hidden half in the top. It's not a usual style we follow for the delete/alert popup. All of a sudden I can see button on the center. And the info of delete the profile in different style.
- 2. Why there is a profile description is renaming the profile? Do we really need this while renaming?

Solution:

1. Delete/alert popup should be same style so that as a user I can able to see the call to actions and the content of the alert in the same way.

Page Name : Security Control: Create New Role
Profiles Roles Data Sharing Settings Zoho Mail Add-on Users
Roles
This page will allow you to define how you share CRM data among users based on your organization's role hierarchy. For more information, refer to online help.
New Role Expand All Collapse All
Don Bosco
Profiles Roles Data Sharing Settings Zoho Mail Add-on Users New Role This page will allow you to create a new role based on your organizational hierarchy. Create a new role and associate it with a higher role. Role Name
Pain Points: New Role button
Solution: Here I'm creating a new role so the button should be "create new role" and the title should be create new role with Create Role button instead of Save.
Conclusion:

Page Name : Se	curity Control: Create / Edit Role
Profiles Rol	es Data Sharing Settings Zoho Mail Add-on Users
New Role This page will all Role Name	ow you to create a new role based on your organizational hierarchy. Create a new role and associate it with a higher role.
Reports To	CEO
Description	4
Cancel	Save
Profiles	Roles Data Sharing Settings Zoho Mail Add-on Users
Edit Role	
Role Name	sdgbtrn
Reports To	Manager
Description	
Save	Cancel
Pain Points: Wh changed to left si	en I click the create new button the alignment looks usual style. But when I edit the role it's de.
Solution: Need t	o change the button alignment.
Conclusion:	

Page Name : Security Control: Create New Role detail page & Delete Role
Profiles Roles Data Sharing Settings Zoho Mail Add-on Users
Role Details
Role Name : sample role
Description :
Edit Delete Go to Roles List
Associated Users:
NAME EMAIL ADDRESS USER STATUS CONFIRMATION STATUS REPORTING MANAGER
No users are associated with this role.
Profiles Roles Data Sharing Settings Zoho Mail Add-on Users
Delete Role
Before deleting, you must transfer users and subordinates with this role to a new role.
Transfer Users and Sub-roles:
Role to be Deleted aehtrdyjdtm
Transfer to Role
Cancel Transfer and Delete
 Pain Points: There is no back button to go back to list. Instead of that we use the go to list button which we don't use in all the places. There is no associated users here so How can I associate? There is no option to associate the users. Dete the role - By click the delete button I have to transfer my users to another role but it's not mandatory. It comes once I click the transfer button. And then I choose the user and click the button.
 Solution: Need to remove the back button and have to place it on top(before title) We need to place the new button "Associate Users" so that user can associate from here. The field should be mandatory. And need to change the button alignment.

Page Name : Edi	it All permission				
É Chrome File Edit View	History Bookmarks People Window He	elp		🛓 🖬 🕹 🖇 🛜	(i) 77% (○) Sat 11:59 PM Q :=
● ● ● ④ (46) - ▷ Zoho (□ ← → C ● crm.zoho.com/crm Ⅲ Apps □ Zoho □ Design Ref □	Cliq - M How tr C Buttor 🐶 Zol x 🐶 m/org687371934/settings/data-sharing/edit Imported From Fir 🔗 Order Flow - Eagl	Zoho 🤇 😥 Zoho 🤇 🎲	Zoho (🖸 YUVA) 📝 - Mess 🎯	Searci 🕘 Dribbi: 💩 Add ic 🧮 Nouni G salesi: 👩 Use P 🖈 😭 🦏 🏤 75 4 × 7 19 12 11 12 12 12 12 12 12 12 12 12 12 12	a Amazı ✓ (745) + Image: Image
	My Jobs Accounts Deals Reportyt ,	Analytics Activities	Products Quotes •••	a 4	+ 🖻 🗠 🍥 🖕
Setup	Profiles Roles Data Sharing S	Settings Zoho Mail A	Add-on Users	Dublic Dead/Write/Delate	
Search Q	Untitled:	Private	Public Read Only	Public Read/Write/Delete	*
General	ContactsXAccounts21:	Private	Public Read Only		
Users and Control	ClassRooms:	 Private 	 Public Read Only 	Public Read/Write/Delete	
Territory Management	Parents:	Private	O Public Read Only	O Public Read/Write/Delete	
Security Control	Accounts X Users:	O Private	O Public Read Only	Public Read/Write/Delete	
Compliance Settings	ContactsXAccounts X Users:	O Private	O Public Read Only	Public Read/Write/Delete	
My own Customization	New1:	Private	O Public Read Only	O Public Read/Write/Delete	
Automation	Red Module:	Private	O Public Read Only	Public Read/Write/Delete	
Process Management Data Administration	New1 X Users:	O Private	O Public Read Only	Public Read/Write/Delete	
Marketplace	New1 X Campaigns:	 Private 	O Public Read Only	O Public Read/Write/Delete	
Developer Space	Subform1 X Users:	O Private	O Public Read Only	Public Read/Write/Delete	
Channels	Leads X Users:	O Private	O Public Read Only	Public Read/Write/Delete	
feaga		Save	ncel		
Chers Cherviels Contacts	Here is your Smart Chat (Ctrl+Space)			Ask Zia	() / / / / / / / / / / / / / / / / / /
		N 🖓 🖓 🛐	i 🕲 🖻 🧿 📜 🕢 🔶 🚳 🗐 👔		
Pain Points: Call	to action is not visib	ole in the fir	rst visit		
Solution: Button	should be placed or	the top rig	ght with default	style. So that user can able to	easily identify.
Conclusion:					

Page Name : Sha	ring Rules				
Profiles Roles Da	ta Sharing Settings Z	oho Mail Add-on Users			
Sharing Rules					+ New Sharing Rule
SHARED FRO	M	SHARED TO	PERMISSION TYPE	SUPERIORS	ALLOWED
RS: Manage	er	RS: Manager	Read-only	0	
Accounts:					+ New Sharing Rule
SHARED FRC	M	SHARED TO	PERMISSION TYPE	SUPERIORS	ALLOWED
G: ergrhr		G: febrgn	Read/Write/Delete	~	
Contacts: E Home Leads Contacts M	Ay Jobs Accounts Deals Profiles Roles	Reportyt Analytics A Data Sharing Settings Zo	No sharing rules created. ctivities Products Quotes ··· oho Mail Add-on Users	Q	+ New Sharing Rule
Securp Search Q General Users and Control Users Territory Management Security Control Compliance Settings My own Customization Automation Process Management Data Administration	New Sharing I This page allows you to Records Shared From Records Shared To Access Type Superiors Allowed Cancel Create	Rule create sharing rules for the Groups • None • Groups • None • Read/Write/Delete	selected module.		. ∂ Help
Pain Points: 1. Repeated b	outton for ever	ry module. Ar	nd the buttons having "+"	instead of add.	

Solution:

- 1. Instead of showing all module with +New sharing rule button. We can change this as a single list and then ask the user to choose the module when created. So that we can avoid number of same buttons repeated in this page.
- 2. The button alignment should be default style(right aligned). The title should be create new sharing rule.

obs Accounts Deals Reportyt Ana	Organize Modules		Q L +
Modules and Fields Tab Groups	You can choose to show or hide modules, or change the order in which they are displayed in the tab.		
0	Q Search		Ourseiter Machile
C Search	C Delas Account link module		Organize Module
DISPLAYED IN TABS AS	Class Rooms	SHARED TO	LAST MODIFIED
Leads	Students specific	All Profiles	October 08, 201
Contacts	Projects	All Profiles	October 17, 2019
My Jobs	S II	All Profiles	August 29, 2019
Accounts	New1	All Profiles	October 01 2019
Deals			Santamber 17.2
Dears	v quide	All Desfler	September 17, 2
Reportyt		All Profiles	August 26, 2019
Analytics	Cancel Save	All Profiles	0
Activities	Activities	All Profiles	October 19, 2019
Tasks	Tasks	All Profiles	September 03, 2
Events	Events	All Profiles	September 03, 2
			₽ Ø.
n Points: 1. Button Alignment is different suddenly it goes down i should goes down?	erent. When I try to hide the module I n the list. I try to move to the same po	have uncheck the r sition and then clic	nodule in a list k the save. Why it
ution: 1. Button Alignment shoul so that I can understand	d be right side. And when I uncheck th d it's hide in the same position. When	ne module it should I needed I can click	be in the same plac

Page Na	ame : Mo	dule							
Loads									
Ledus									
Layouts	Layout Rules	Validation Rules	Fields	Links and Buttons	Summary				
Design you	ır own layouts to fit	your business proces	ses, then as	ssign them to your user	accounts basec	d on permission profiles.			
							New La	Layout Assignment	
NAME		SHARED TO	1			LAST MODIFIED		STATUS	
Leads									
Lovouto	Lavout Dulas	Validation Dulos	Fields	Links and Ruttons	Summani				
Layouts	Layout Rules	Validation Rules	Fields	LINKS and Buttons	Summary				-
Layout rule	s allow you to man	age sets of fields and	sections. De	efine your own rules to r	natch your layo	ut with how you do business.			1
All Layou	ts 👻							+ New Layout Rule	
NAME		PRIMARY FI	ELD		LAYOUT		LAST MODIFIED	STATUS	
Layouts	Layout Rules	Validation Rules	Fields	Links and Buttons	Summary				
Set validati	on rules to verify d	ata a user enters withi	n a record b	pefore saving.					4
All Layou	its 👻							New Validation Rule	Į
FI	ELD NAME	VA	LIDATE USIN	G	EXECUTES ON	LAYOUT NAME	LAST MODIFIE	D STATUS	
Pain Po	ints : Havi	ing Differen	t Style	buttons in t	he next	tabs looks inconsiste	nt of the create	outton.	
Solution Validatio	n: We sho on Rule.	ould follow th	ne sar	ne style in al	l these p	places. Create Layou	t, Create Layout	Rule, Create	
Conclus	sion:								

age Name : Fields					
Leads					
Layouts Layout Rules Valid	lation Rules Fields Li	nks and Buttons	Summary		⑦ Helj
		Field Listing	Field Permissions	Personal Fields	
All Layouts 👻 🔍 Search Fields	or Data Types				+ Create & Edit Fields
FIELD LABEL	DATA TYPE	CUST	OM FIELD	LAYOUTS	
Account	Lookup	✓ adsfdghg		adsfdghgh a	and Standard
Annual Revenue	Currency			adsfdghgh ,	Custom Layout and Standard
Attachements	File Upload	~		adsfdghgh a	and Standard
Average Time Spent (Minutes)	Decimal			adsfdghgh ,	Custom Layout and Standard
in Points: Got bit o	confusion about	the button.	Is it Add/Cre	eate/Edit field	ls
lution:Actual funct	ion is edit the fi	elds in the e	existing mod	ules so the c	all to action should be Edit Fields.
onclusion:					
ge Name : Links &	& Buttons				
Leads					
Layouts Layout Rules Valid	lation Rules Fields Li	nks and Buttons	Summary		(?) Help

Experience the power of customization by defining the action you want to be performed when a user clicks the link or button. Also, through a single-click action, you can connect Zoho CRM to third-party applications, other Zoho CRM modules, or other Zoho Apps. All Components 👻 NAME PLACEMENT PROFILES PERMITTED @} Link sample link **Details** Page Administrator and Standard Link sfdxgfc Details Page Administrator and Standard Button Red List View - Button for each record Administrator and Standard Button ofda Edit Dago Administrator Pain Points: Similar buttons with +New. Solution: We have this option to create new button/Link so the action should be "Create Button" "Create Link" So we can group the button with mostly used "Create button" first and then keep the link inside the dropdown.

Page Name : Field Permission						
É Chrome File Edit View	🗯 Chrome File Edit View History Bookmarks People Window Help					
	Clic X M Hov X C But: X V V m/org687371934/settings/modules/Leads/fie imported From Fir O Order Flow - Esgl My Jobs Accounts Deals Report.vt	oh x 😥 Zoh x 😥 Zoh Id-permissions Alighcharts demos 👿	x ₩ Zoh x YU\ x Al x Sec x ☆ 10 rules for better Data Tables Desig Design Systems oducts Quotes	See X ▲ Add X ■ Not X G sale X 2 Use X	+ & :: :: »	
← MODULES Q	Leads					
Contacts	Layouts Layout Rules Validation	Rules Fields Links a	ind Buttons Summary	(Help	
Accounts						
Deals			Field Listing Field Permissions Personal Fields			
Tasks	Administrator - O Search Fields			+ Crosta & Edit	ields	
Events	Administrator					
Calls	FIELD LABEL	READ AND WRITE	READ ONLY	DON'T SHOW	- 11	
Products	Account	۲	0	0	- 11	
Quotes	Attachements	٢	0	0	- 11	
Sales Orders	Average Time Spent (Minutes)	۲	0	0	- 11	
Purchase Orders	City	۲	0	0		
Invoices	Company	۲				
Campaigns	Country	۲	0	0		
Vendors	Created By	۲	0	0		
Price Books	Currency	۲				
Cases	Date/Time 1	۲	Save Cancel			
Image: Channel Chan (Chri-Space) Image: Channel Channel Chan (Chri-Space) Image: Channel Channel Chan (Chri-Space) Image: Channel Ch						
Pain Points: Save&Cancel button alignment is different.						
Solution:Button alignment should be on the right side of the page with default style (Primary on the right side)						
Conclusion:						

Page Nam	e : Module B	Builder					
\leftarrow Leads		adsfdghgh 👻 🛞				Cancel	Save and Close Save
New Fields \vee		CREATE					0
🖂 Single Line	🗔 Multi-Line						
🖾 Email	S Phone	Subform 1					
🖂 Pick List	∜⊟ Multi-Select	Single Line 1	Single Line 2 ····	Email 1 ····	Phone 1		
Date	Date/Time	Single Line		Email		+ Add Field	
123 Number	1- 2- Auto-Number						
\$ Currency	.00 Decimal	Subform 3					
% Percent	99 Long Integer	Subionin S					
Checkbox	N URL	+ Add Field					
🖳 Lookup	fx Formula	+ Add Heid					
& User	1. File Upload						

Pain Points:

- 1. When I click the save button it's not closed (expected behaviour not happen). Why we need Save&Close and Save button?
- 2. + & Add convey the same meaning but both placed in the single action.

Solution:

- 1. As a user if I wanted to check the changes means I need an option to preview the changes. So that I can be able to view the changes in the same page. In this case we can remove the button "Save and Close" and keep preview as second priority so that It won't be confusing to the user when click the save.
- 2. Need to remove "+" from the action and it should be "Add New Field". If we need the "+" in any case we should use the icon.

Page	Name : Layout Rule		
🗯 Chro	rme File Edit View History Bookmarks People Window Help 🛓 🛙 🕄 🖓 🛠 🎓 🕪 52% 😥 Sun 2:14 PM 🔍 🚍		
	🔄 (47) X 💱 Fee X 📮 Clic, X 🔲 Hov X 🗄 But: X 😥 Zoh X 😥 Zoh X 😥 Zoh X 🕼 Zoh X 👘 Zoh X		
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	in Show Eigld(/)		
	+ ingger an action		
	Choose an option		
Dain			
	-oints: Here the "+" conveys Add trigger an action		
1.	There is no save/Cancel button on this name		
3.	There is no separation between the Rule name and the rule.		
4.	As a user i need to add criteria here but it shows choose an option		
	•		
Soluti	ion:		
1.	Action should be "add action"		
2.	Need save/cancel button in this page. As we don't follow the auto save in other features we need to keep the consistency here		
3	Need a separation for the title and the rule		
4	Action should be "Add New Criteria"		
Concl	lusion:		
Page Name : Validatio	on Rule		
--	--	---	--
Chrome File Edit View History Bo O(47) × ♀ Fee × ♀ C lia × ← → C a crm.zoho.com/crm/org687371 Apps ⊇ Zoho ⊇ Design Ref ⊇ Imported Fr	okmarks People Window Help Mov x IB; Butt x IV IV </th <th>< < 20h x ■ YU\ x ♥ - M: x ● See x ● See 1446109?layoutId=3933324000001165003 ☆ 0 0 0 rules for better I Data Tables Desig ♥ Design Systems G</th> <th></th>	< < 20h x ■ YU\ x ♥ - M: x ● See x ● See 1446109?layoutId=3933324000001165003 ☆ 0 0 0 rules for better I Data Tables Desig ♥ Design Systems G	
■ Home Leads Contacts My Jobs A ← @ Leads / adsfdghgh Execute rule When WHER WHER	xccounts Deals Reportyt Analytics Activities Pro	ducts Quotes •••	Q C ⁴ + IP ⊠ % (⊗) Cancel Save I I ⊘ 1
is Ru google Co Ru Co	le applied for, mpany is zfbeshb le applied for, mpany isn't gveabsrtbn	show verb 9700 Enter your alert message here 0/00	
Add another option Specify criteria to validate Website	smart Chat (Ctrl+Space)		Ask Zia (2) 2/3 (2) 3
Website is R google C	Which records would you like to apply the ru All Records Choose based on specific City * is *	lie to? c conditions egsntrs	+
Add another option Pain Points:		Cancel	Done

- 1. I need an option to save the message. I don't know if it is saved/not.
- 2. As a user i need to add criteria here but it shows Add another option
- 3. Button alignments are different for edit criteria and add new criteria.

Solution:

- 1. When user type the alert message we should give a done/save button while typing the message.
- 2. The action should be "Add New Criteria"

3. Need to follow the same style(Primary on the right side) in all the places.

Page Name :Fields - Personal Fields						
	My Jobs Accounts Deals Repc	Personal Fields - Leads		Q C ⁴ + ⊞ ⊠ % 🚱		
 MODULES Leads Contacts Accounts Deals Tasks Events Calls Products Quotes 	Leads Layout Rules Valid All Layouts Q Search Field of Field LABEL Annual Revenue Attachements	FIELDS Annual Revenue Attachements Average Time Spen Company Country Add Field	PERSONAL DATA TYPE Normal Sensitive Normal Sensitive Normal Sensitive Normal Sensitive Normal Sensitive	Theip S Edit Personal Fields + Create & Edit Fields ut and Standard		
Sales Orders	Average Time Spent (Minutes) Company		Cancel Done	ut and Standard ut and Standard		
Invoices	Country First Page Visited	Normal	adsfdghgh, Custom La	yout and Standard		
Pain Points: "+" and "Add" convey the same meaning.						
Solution: Need to remove the "+" and the action is "Add Field"						
Conclusion:						

Page Name : Tag Group						
yt	Tab Grou	os ×	Tab Grou	ps ×		
oups	Name	Sales	Name	I		
	Tabs	✓ Home	Tabs	Home		
		✓ Leads		Feeds		
ıps. Jiffer		Contacts		Leads		
		Accounts		Contacts		
		✓ Deals		My Jobs		
		✓ Reportyt		Accounts		
	Permissions	PROFILES	Permissions	PROFILES		
		Administrator		Administrator		
		Standard		Standard		
		🗌 vickey 2		vickey 2		
		□ sf		□ sf		
		vickey New		vickey New		
		rockey		□ rockey		
		kjbkjbkj		□ kjbkjbkj		
Cancel Save						
 Pain Points: 1. First one is edit tab group and the another one is Create New Tab group. There is no difference between create and edit. 						
Solu	ution: 1. When 2. When be "Cr	I click the edit the title should be "Edit T I create New tab group the title should eate"	ab Group be "Create	". New Tab Group" and the call to action should		
Con	clusion:					

Page	Page Name : Tab Groups				
М	odules and Fields Tab Groups	Web Tabs			
Ta	ab Groups				
You	i can create un to 25 tab groups. Eac	ch tab group can contai	an unlimited number of tabs		
The	e tabs visible in a group may differ de	epending on the user's	profile permissions.		+ New Tab Group
	GROUP NAME	TAB	5		
	Sales	Ho	ne,Leads,Contacts,Accounts		
	marketing	Ho	ne,Feeds,Leads,Contacts		
	super deluxe	Ho	ne,Leads,Contacts,My Jobs		
Pain	Points:				
1.	Here the call to ac	ction is add ne	w but its purpose is	to create new tab grou	ıp.
2.	. We have a lot of s	space we not	yet show all the tabs	in the list.	
Solut	tion:				
1	Call to action shou	uld be "Create	e Tab Group"		
2	Need to show all ta	abs/maximur	n tabs in the list.		
Conc	lusion:				

Page Name : Web	Tabs
Modules and Fields Tab	Groups Web Tabs
Web Tabs Web tabs let you open web pa organization. You can also cre	ages, like intranet pages, company-wide announcements, or web applications, inside Zoho CRM. These tabs can be viewed by any Zoho CRM users in your ate your own applications using Zoho Creator and access them inside Zoho CRM.
	(You can create up to 25 tabs, each with a unique name.) + New Tab
TAB NAME	LINK
guide	https://material.io/components/buttons/#anatomy
Web tab	https://crm.zoho.com/crm/org687371934/settings/web-tabs
Modules and Fields Tab	Groups Web Tabs
Edit Web Tab	⑦ Help
Tab Name guideerrg	jwa4
Source OLinks	Widgets
Link https://ma	aterial.io/components/buttons/#anatomy
Append Parameters	
Web Tab Access	
Administrator × Standard ×	vickey 2 × sf × vickey New × rockey × kjbkjbkj ×
Ļ	
Save Cancel	
Pain Points: 1. Again the "+1 2. Button alignm	New Tab" nent is different than usual.
Solution: 1. Call to action 2. Button should	n should be Create Web Tab d be default style(Primary on the right side).
Conclusion:	

age Name . Tem	plates			
Templates	Email Inventory Mail Merge		All Modules 👻	Q Search Template
+ New Template	TEMPLATE NAME	MODIFIED BY	LAST USED	STATS
All Templates	☆ Sfdghn	Vignesh G		
Favorites	Leads • resdgh	Sep 02		
Associated Templates	☆ Welcome	Vignesh G	Aug 31	30.8%
Created by me	Contacts - Subject	Aug 28		4/13
Shared with me	A Red	Prakash Sekar	Oct 15	1%
Public Email Templates 🔗	🖉 Leads - hghgh	May 31		5/497
	🚖 Big Deal Alert		May 29	÷
	Deals • Big Deal Alert			
Leads 👻				Insert HTML / Plain Text
+ New Template	TEMPLATE NAME	MODIFIED BY		LAST USED
All Templates	☆ 🔄 Red.docx Leads	Prakash Sekar May 31, 2019		
avorites				
Created by me				
Shared with me				
Public Mail Merge Te 🖄				
ain Points: 1. Instead of c 2. Different sty 3. The icon loc	reating new one we use "+ new but /le for call to action oks like a download icon.	tton"		
1. Need to rep 2. This action 3. Need to rep	lace the literal as Create New Tem should be primary for this page so lace the icon with dropdown and in	plate. need to change this as side that we can show t	a primary bu the "import ter	tton. mplate" so that use



Page Name : Customize home page				
Customize Home pag You can create custom homepage lay	e youts for each role, making it easier f	or employees to complete their daily task effic	iently.	⑦ Help + New Home Page
NAME	SHARED WITH	DESCRIPTION	LAST MODIFIED	STATUS
New homepage	Manager	dsfdbf	Sep 24, 2019	
New Page	CEO	new homepage	Oct 15, 2019	
Untitled Homepage DASHBOARD > CUSTOM VIEW > E Home Leads Contacts My Jobs A New homepage ••• • • • • DASHBOARD > • • • • • CUSTOM VIEW • <	Accounts Deals Reportyt Analytics	Activities Products Web tab *** Deals IN PIPELINE :: 382 EAR : REVENUE TARGET - THIS YEA	Ac 1 La	Save & Share Cancel
		Entire Org ALL 3 456.00	Target : ALL 10 000.00	
Pain Points: 1. Primary action is 2. Button alignmen	s creating a new hor ht is different than the	nepage but is adding a ne e usual one.	w one to the list.	
Solution: 1. Primary action s 2. Button alignmer	should be "Create Ho nt - Primary should b	ome Page" e on the right side.		
Conclusion:				

Page Name : Custe	omize home page			
Translation Settings La	nguage Import History			
Translation Settin Translations allows you to tra translation.	NGS CO anslate field names and picklist values between 25 langu	uages within Zoho CRM. Export the language files you	u wish to translate. Import the	Help m back after the
			Add Language Imp	ort Export All
LANGUAGE NAME	LANGUAGE CODE	LAST TRANSLATED	STATUS	EXPORT
English (United States)) en_US		Yet to Translate	Export 🔟
Chinese(Taiwan)	zh_TW		Yet to Translate	Export 😃
English (United Kingdo	om) en_GB		Yet to Translate	Export 😃
Czech	cs_CZ		Yet to Translate	Export 斗
 Home Leads Contacts My. Setup Search Q General Users and Control My own Customization 	Jobs Accounts Translation S Delete Language - Chinese(Taiwan You are about to delete a language for which the this language will be lost and cannot be restored. Are you sure you want to delete this language Translation Translation sall	a) e translation has already been done. On deletion, all translated text i d. ge? Cancel Delete Language	Q 2 ³	+ I I I S S S
Pain Points: 1. Placed three 2. Alert/Delete	e primary buttons in a row. info is different than usual style			
Solution: 1. Primary butt 2. Need to follo	on should be "Add Language". An should be "Add Language". An source of the second style for all the alert/info	And the secondary buttons sh	nould be import a	and export all.

age Name : Schedules					
Schedules				⑦ Help	
Schedules are customizable actions that ca and other third-party applications.	n be triggered automatically using functions. So	chedules can be used to integrate your 7	Zoho CRM data with Zoho apps, you	ur company's website,	
Schedules Failures			+ 0	Create New Schedule	
SCHEDULE NAME	LAST RUN	NEXT RUN	FREQUENCY	STATUS	
fxgchvjbkn	Aug 28	Completed	Once		
gfdfdfd	Sep 13	Completed	Once		
in Points: "+" used before the call to action					
lution: Need to remove	the "+" and the call to action	on should be Create Ne	ew Schedule.		
onclusion:					

Page Name : Create Schedules			
Create New Schedule			⑦ Help
Schedule Name	wegrthey	Add Desc	iption
Function to be executed	red		
Execution Start Date	10/27/2019	05:00 PM	
Frequency	Every day 🔹		
Ends	Never		
	After 1 Times		
	On 10/27/2019		
Save			
Pain Points: For Creating the new schedul	e the call to action not exp	lain the same message.	
Solution: Call to action should be Create/C	reate Schedule. And align	ment should be right side.	
Conclusion:			

Page Name : Schedule Function	
sdfghj Function Description	Close Save & Execute Save
Deluge Tasks void fghij0 Edit Arguments	(?) Help
BASIC 1	
set variable	
add comment	
Info	
CONDITION	
x	
xvcbn Function Description	Close Save & Execute Save
Deluge Tasks void gfdhjb() Edit Arguments (?) Help	Console
CONDITION 1 vdaxfhhfadbanf c = <expression> ;}</expression>	Failed to save the function
<pre># 2 info <expression>; # 3 else if (<variable> <opr>> <expression>)</expression></opr></variable></expression></pre>	Syntax error. Expecting statement. Found 'c'. Line Number: 1
else if $4 \neq \frac{1}{5}$	
else 6 sendmail 7 - [
•	
Pain Points: Two primary buttons. Save&Execute,Save.	
Solution: There is no need for two buttons here. When as a user If I click the save it function. Same thing happen for save&execute. If anything error in the function I can side. It happens for both buttons. Then what is the purpose of two here. Suggestion to keep only one button save/Save&execute.	saves and execute the see the error on the right
Conclusion:	

Page Name : Ema	ail Notifications	
Setup	Email Notifications Tasks Field Updates Webhooks Functions	
Search Q	New Email Notification	^(?) Helo
General		
Users and Control	Name chetta	
My own Customization	Module Leads ~	
Automation	Email Recipients Show recipients	
Schedules	Additional Recipionte kautotičemail com unegračemail com	
Actions		
Assignment Rules	Email Template Słdghn	
Case Escalation Rules	From vignesh.gnanasekaran@zohocorp.com *	
Scoring Rules	Add Reply To	
Workflow Rules	Save Cancel	
Process Management		
Email Notifications Ta	Tasks Field Updates Webhooks Functions	
hello		Edit Delete
Name	hello	
Module	Contacts	
Email Pacinients		
Lindi Recipiento	Person associated to the Contact	
Email Template:	Welcome	
Related Rules		
	Not associated with any Automation rule	
Pain Points: 1. Button alig	gnment is different.	
need to de	elete this.	ne i need to edit of i
Show recip	pients and email template not looks like a button.	
Solution: 1. Button alig 2. Need to pro 3. We don't h kind of acti	gnment should be right side. rovide back button here. have seperate style in lyte. We already have designs for (Upload, cho tion. Need to follow the same.	ose recipient, browse)
Conclusion:		

Image in the life liped one where Weekhood is Functions Tasks Image one tasks seegneer to users where Workfrow Fulles, Blaupperter, or Approved Processes are associated. Image one tasks seegneer to users where Workfrow Fulles, Blaupperter, or Approved Processes are associated. Image one tasks seegneer to users where Workfrow Fulles, Blaupperter, or Approved Processes are associated. Statistic ALL MODIALS Y ALL MODIALS Y ADE DATE Processey Statistic Associated to the Processes are associated. Statistic ALL MODIALS Y ADE DATE Processey Statistic Associated to the Processes are associated. Reminifier for defended task-Statistics Statistic Tasks Berninder minus 1 day(s) Highest Defended Image: An approximation of the Processes Tasks Berninder minus 1 day(s) Highest Defended Image: An approximation of the Processes Tasks Berninder minus 1 day(s) Highest Defended Image: An approximation of the Processes Tasks Berninder minus 1 day(s) Highest Defended Statistic Statistic Tasks Berninder minus 1 day(s) Highest Defended Image: An approximation of the Processes Tasks Berninder minus 1 day(s) Highest Hi	age Name : Tasks					
Tasks Image: Control of the state state state where Woodflow Rules, Blueprinte, or Approval Processes are searched. Provinty State Adjustment of the state	Email Notifications Tasks Field Update	es Webhooks Functi	ons			
Image: Number of the start of a start of the start o	Tasks These are tasks assigned to users when Workf	low Rules, Blueprints, or Ap	proval Processes are executed.			⑦ Help + Create Task
Important Tests Reminder minus 1 day(s) Highest Watting for input Reminder for deformed task. \$Titaks.Subject] Tasks Reminder minus 1 day(s) Highest Deformed In Points: . New York New York New York New York 1. Need to remove the "+" in the create task button. . . . New York New York 2. Title and call to action is different than functionality. Here task is newly created so the title and CTA should be different. . . . 4ution: 1. Button text should be Create New Task. 2. Title should be create workflow task and the button text is create task. 	SUBJECT	ALL MODULES 7	DUE DATE	PRIORITY	STATUS	ASSIGNED TO
in Points: **** in the create task button. 2. Title and call to action is different than functionality. Here task is newly created so the title and CTA should be different. /ution: 1. Button text should be Create New Task. 2. Title should be create workflow task and the button text is create task.	Reminder task for - \$(Tasks.Subject)	Tasks	Reminder minus 1 day(s)	Highest	Waiting for input	
 in Points: 1. Need to remove the "+" in the create task button. 2. Title and call to action is different than functionality. Here task is newly created so the title and CTA should be different. ilution: Button text should be Create New Task. Title should be create workflow task and the button text is create task. 	Reminder for deferred task - \$[Tasks.Subject]	Tasks	Reminder minus 1 day(s)	Highest	Deferred	
 in Points: 1. Need to remove the "+" in the create task button. 2. Title and call to action is different than functionality. Here task is newly created so the title and CTA should be different. /ution: 1. Button text should be Create New Task. 2. Title should be create workflow task and the button text is create task. 						
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 2. Title and call to action is different than functionality. Here task is newly created so the title and CTA should be different. Indution: Button text should be Create New Task. Title should be create workflow task and the button text is create task. 	1. Need to remove the "+	" in the create t	ask button.			
 Iution: 1. Button text should be Create New Task. 2. Title should be create workflow task and the button text is create task. 	2. Title and call to action should be different.	is different than	functionality. Here task is	s newly crea	ated so the	title and CTA
 Button text should be Create New Task. Title should be create workflow task and the button text is create task. 	Jution					
 Button text should be Greate New Task. Title should be create workflow task and the button text is create task. 	Diution:	Oranta Navi T				
2. I Itie should be create workflow task and the button text is create task.	1. Button text should be (reate New 1 as	SK.	a taali		
	2. Little should be create	workflow task a	nd the button text is creat	e task.		

Page Name : Tasks		
Email Notifications Tasks Field Updates	Webhooks Functions	
cgvhbjknl		Edit Delete
Subject	cgvhbjknl	
Due Date	great minus 12 day(s)	
Priority	High	
Status	In Progress	
Module	Leads	
Assigned To	Vignesh G	
Notify Assignee	Yes	
Remind Assignee		
Description		
Pain Points : here is no way to I need to delete this.	go back. If a user come to this page th	nere is only two ways one I need to edit or
Solution: Need to provide back	k button here.	
Conclusion:		

Page Name : Fiel	d Update			
Email Notifications Ta	sks Field Updates Webhooks	Functions		
Field Updates Field update actions allow	you to update the values of specified f	ields when the associated Workflow Ru	es, Blueprints, or Approval Processe	? Help s are executed. + Configure Field Update
NAME	ALL MODULES ¥	FIELD TO UPDATE	NEW VALUE	
approval pr	Contacts	Assistant	vbj	
Lead	Leads	Company	google	
nsvdbv	Leads	Annual Revenue	1000	
Email Notifications	Tasks Field Updates Webh	ooks Functions		
	-			
New Workflow	/ Field Update			
Name				
Module	Leads 👻			
Undate	None = -			
	None -			
Save				
Cancer				
Pain Points: 1. + used in the	ne starting.			
Z. The and ca	all to action should be	the same.		
Solution: 1. Button sho 2. Here the fid New Field	uld be create field upo eld update is applicab update" as common fo	date. Need to remove ' le for blueprint, workflo or all. Call to action she	+" w, approval process buld be create.	so Title should be "Create
Conclusion:				

Page Name : Field Up	date					
Email Notifications Tasks F	Field Updates Webho	oks Functions				
Field Update Details						Edit Delete
Field Update Name	Lead					
Module	Leads					
Field to Update	Company					
New Value	google					
Related Rules						
Rule Name	Туре	Module	Layout	Field	Execute On	Status
sample	Workflow Rule	Leads			Create	~
Accounts Deals Reportyt An Email Notifications Task	aly ks	Are you sure you y	want to delete? ies, delete			
Field Opdate De	ldlis					Edit
Field Update Name	n	svdbv				
Module	Le	eads				
Field to Update	A	nnual Revenue				
Pain Points: 1. There is no way 2. Alert popup sho	/ to go back. ould be consist	ent all over the	pages.			
Solution: 1. Need back butto 2. Need to change	on on this page the alert info	e. So that we ca with title and pr	an keep consist oper descriptio	ency on all t n and button	he pages. alignment.	
Conclusion:						

Email Notifications Tasks	Field Updates Webhooks Functions		
Webhooks Webhooks let you communicate v	ith third-party applications by sending instant web notifications when a partic	ular event occurs.	⑦ Hel
ist of Webhooks Failures			Configure Webhoo
NAME	ALL MODULES Y URL TO NOTIFY	CUSTOM PARAME	TERS
Email Notifications Ta	ks Field Updates Webhooks Functions		
New Webhook			
Name			
URL to Notify	Example: https://yourdomain.com/getNotified.do	1.	
Method	POST		
Description		h	
Module	Leads 👻		
URL Parameters			
Append Entity Parame	iers		
• Append Custom Parar	eters (Like API Key, Auth Token, etc.)		
Preview URL	6	(Refresh)	
Save Cancel			
n Points : Title and bhooks.	call to action should be relevant to the mail	action. The functionality is	s creating new
ution: 1. Call to action s	nould be "Create new webhooks"		

Page Name : Functions

\leftarrow Existing Functions

Listed below are the functions created by users in your organization. Configure the functions based on your business needs.



? Help

Lead Scoring

Lead Scoring is a methodology used to rank leads based on a scale that represent...

My Jobs Ac	ccounts Deals Re	\leftarrow Configure Function			? Help	Q (2) +
	Email Notificat	Name	Capturing Sales Region Ec	dit Function		
Q	Functions Functions are w	Description	Global sales region is geographic categorized as US, UK, Europe-M (EMEA), SAMERICA (South Ameri Pacific (APAC). This function will c sales region based on c	ally iddleEast-Asia ica) and Asia letermine the		responses from third-party appli
ition	Functions Fai	Module to be associated	Select Module 💌			1 C C C C C C C C C C C C C C C C C C C
	NAME			Cancel	Save	2go Deluge
Pain Poin function s	nts: As a use so the configu	r when I click the con re button is irrelevan	figure function I hav t here.	ve to select the	e function	from gallery or existing
Solution: Need "select function/select" instead of configure. Third image: this is the place where I can configure the function. So the call to action should be configure instead of save.						
Conclus	ion:					

Pag	Page Name : Assignment Rule							
	Assignment Rules Assignment Rules helps you automa	tically assign records to users based o	n specified criteria.		+ New Assignment Rule	4		
	Rule Name	All Modules 🖤	Created By	Modified By				
	ddd	Contacts	Prakash Sekar	Prakash Sekar				
	dsdgfhjkhj	Contacts	Vignesh G	Prakash Sekar				
Pain Points: When as a user i'm creating the new assignment rule but CTA shows "+New"								
Solution: CTA should be Create assignment rule.								
Сог	nclusion:							

Page Name : Ass	signment Rule detail page	
Chrome File Edit View One Solution - x □ Cliq - 2 Apps ☐ Zoho ☐ Design Ref ☐	tistory Bookmarks People Tab Window Help Tue 9:51 PM Q =	
≡ Home Leads My Jobs A Setup	ccounts Deals Reportyt Analytics Activities Quotes Sales Orders ···· Q 4 + 19 22 % 10 Sample @ Contacts Description	-
Search Q General Users and Control	Create Rule Entry	e e
My own Customization Automation Schedules	Assign record to	9
Actions Assignment Rules Case Escalation Rules	Category Users Select Users Users matching certain conditions	2
Scoring Rules Workflow Rules Process Management	Would you like to check user availability before assigning? Yes	d d
Channels Data Administration Marketplace	No Followup Task + Add Task	9
Developer Space feaga	Save Rule Entry Cancel	

Pain Points:

- 1. Below the assign record the "select users" action not looks like a button.
- 2. As a user I have an option to assign/Associate task to this rule but it shows "+add task"
- 3. Title is different than "Assignment Rule". Call to action is looks like save the edited entry.

Solution:

- 1. Need a shuttle style for select users button.
- 2. Below the follow up task the action should be "+Assign Task"
- 3. Main CTA should be Create Rule.

Page Name : Assig	nment rule - Assign task.					
	Assign Task - Contacts				×	4 - 2 - 4
Setup	Q Search				+ New Task	
Search Q	Subject	Due Date	Priority	Status	Assigned To	
General	retre	Trigger Date plus 55 day(s)	High	Not Started		
Users and Control My own Customization	dfghngertg	Trigger Date plus 34 Business Day(s)	High	Not Started		
Automation	Associate Cancel					
	Assign Task - Contacts				×	.4 + 8 🛛 🛠 👘
Setup	Subject					
Search Q	Due Date	Trigger Date 👻 plus 👻	0000 Busine	ess Day(s) 👻		
General	Status	Not Started 👻				
Users and Control	Priority	High 👻				
Automation	Assigned To	Select Users * () If you do not assign the task to	a user, it will be	A automatically assigned	to the Record Owner.	
Actions	Notify Assignee					
Assignment Rules	Remind Assignee					
Case Escalation Rules	Description					
Scoring Rules Workflow Rules	O Type # to insert merge field			Save and Associa	te Cancel	
Pain Points: 1. Title and the 2. Again "+new	main call to action is different Task"					
Solution: 1. Once user se 2. Secondary b	elect the existing task the main utton "+New Task" should be	n call to action sho "Create New/Crea	ould be ate Ta	e Assign sk".	instead of	associate.

3. Second Image: Title should be create New Task and the call to action is save and assign.

ige Name : Workflow Ru	lles				
Rules Usage					
Workflow Rules					? Help
Workflow rules allow you to perform certain more.	automatic actions on specific records bas	sed on filter criteria. Workflow auto	omations can send er	mails, update fields, cr	eate records and much
Search Q				Reorder Rules +	Create Rule
Rule Name	All Modules 🛛	Execute On	Actions	Last Modified	All Status 🛛
sample	Leads	Create	3	Sep 02, 2019	
Task Test	Tasks	Create or Edit	2		
vbcnvcmbn,m.,	Contacts	Create	2		
in Points: "+ Create Rule	e"				
lution: Remove "+" and	use Create Rule.				
nclusion:					

Page Name	Page Name : Workflow - Assign task								
≡ Home Leads M	/ly Jobs Acco	Assign Task - Contacts				×	, ¹¹² , +		*
Add Description		Q Search				+ New Task			
WHEN	This ru	Subject	Due Date	Priority	Status	Assigned To			
	Recur	retre	Trigger Date plus 55 day(s)	High	Not Started				
		dfghngertg	Trigger Date plus 34 Business Day(s)	High	Not Started				
CONDITION	This ru	Associate Cancel							
Dala Dalata									

Pain Points:

- 1. Title and the main call to action is different.
- 2. Again "+new Task"

Solution:

- 3. Once user select the existing task the main call to action should be Assign instead of associate.
- 4. Secondary button "+New Task" should be "Create New/Create Task".
- 5. New task popup: Title should be create New Task and the call to action is save and assign.

Page Name : Workflow - add tag	I						
Me Leads My Jobs Accounts Deals Reportyt Analy Description WHEN This rule will be executed 1 Day(s) After (Recur Once	Add Tags Enter tags Overwrite existing Tags.	× Q Cancel Save					
 Pain Points: 1. Every popup in this feature have left alignment but this button alignment is different than others. 2. Add is more meaningful than save 							

Solution:

- Need to follow the same alignment for this popup.
 Need to change the CTA as Add tag/Add instead of save.

Page Name : V	Vorkflow - webhooks		
Leads My Jobs Acco	Webhook - Contacts	×	. 4 + 🖲 🛛 🛠
ription	Q Search	+ New Webhook	
EN This ru	Name	URL to Notify	
Recur	vfdgfbg	https://ionicframework.com	
	Associate Cancel		
Pain Points: 1. Title and 2. Again "+	d the main call to action is different. new webhook"		
Solution: 1. Need to	follow the "Assign Task" style here.		
Conclusion:			

Page Name : v	workflow - Email Notification		
Leads My Jobs Acco	Email Notification - Contacts		× 4 + 1 × ×
This ru	Q Search + Cru	eate Email Notification	
Recur	Name Email Template		
	fcghvjk Welcome		
	hello Welcome		
DITION This ru	□ Send this email notification at Best Time to Email. ①	Ssociate	
Leads My Jobs Acco	Email Notification - Contacts		× . 🗳 + 🖻 🛛 💥
This ru	Name		
Recur	Email Recipients Choose recipients		
	Additional Recipients Use commas to separate additional email addresses		
	Email Template Select Template		
This ru	Send this email notification at Best Time to Email. ①	Ssociate	
Leads My Jobs Acco	Email Notificatio Select Template	×	× 🗳 + 🖻 🖂
	All Templates All Templates C Search Template C All Template All Template		
EN This ru Recur	Email Recipients		
		-	
	Additional Recipients		
	Email Template	_	
Pain Points: 1. Popup t 2. "+" adde	type is not consistent for 1&2 image. ed before call to action in the template selection page.		
Solution: 1. Need to 2. Need to	o follow the "Assign Task" style. o remove the "+". And the call to action should be Create Templat	te.	
Conclusion:			

Page Name : Workflow - Rem	ove action, Cancel workflow								
Execute 3 hour(s) After	Rule Trigger Time								
Email Notifications	Demous Cale adula d Action								
asdfghj	Remove Scheduled Action								
+ ACTION	By doing so, all of its associated actions will be removed. Are you sure you want to remove it?								
Execute 2 hour(s) After	Rule Yes, remove Cancel								
+ ACTION									
WHEN This rule will be executed 1 Day(s) Recur Once	After Created Time.								
CONDITION This rule will be executed for all co	Cancel Workflow The changes made to this workflow rule have not been saved. Are you sure you want to discard your changes?								
	Yes Cancel								
	Scheduled Actions Execute 2 hour(s) AfterRule Trigger Time								
+ ACTION									
Pain Points: Two type of alert i	nessage style used in the same feature.								
Solution: Need to follow the sa	me style for alert/delete info.								
Conclusion:									

Page Nam	ne : Ali	ignment Issue		
	My Jobs Acc			× 🗸 + 🖻 🖂 🛠 👔
		Eult Email Notification - Leads		
		Name		asdfghj
		Email Recipients		Choose recipients
CONDITION		Additional Recipients		xvghv@fmh.com
		Email Template		Select Template Red
+ Add another	<i>∳</i> + Ir	From		vignesh.gnanasekaran@zohocorp.com •
condition	Tasks Follow			Add Reply To
	Field U			
	+ ACTI	«		Save and Associate Cancel
≡ Home Leads	My Jobs Ac	Edit Field Update - Leads		× , 🗸 + 🖻 🕱 🛠 🁘
		Name	Lead	d
		Module	Lead	Js
CONDITION	(1)	A Update	Com	npany 🔻 = google
				Save and Associate Cancel
+ Add another	%	Instant rotons		
Chrome File Edit	View History B	lookmarks People Tab Window Help		② ● C △Not Connected 3 奈 40) 82% ■) Tue 11:06 PM Q Ⅲ
 ♦ Inbox - × ♦ → C	Cliq - 2 × E Bu	utton x E. ListVie x Ø Zoho C x Ø Zoho C x 1934/settings/workflow-rules/3933324000001073129	Zoho C 🗙 😥 Zoho C 🗙 I	12/20ho x 12/20ho x 14/10uter x G Google x Δ Calenc x New Tab x + ☆ 0 ◎ 2m 4 & ? □ □ ☆ 1 □ ☆ 2 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0
🔛 Apps 📄 Zoho 📄 Desig	gn Ref 📄 Imported I	From Fir 📀 Order Flow - Eagl 🥠 Highcharts demos 👿 1	0 rules for better M Data T	Tables Desig 🎓 Design Systems G 💿 Design Starter Kit 🔄 Droadown Sema 😕 💌
	Ed	lit Task - Leads		
	Sub	pject	Follow up - \${Leads.L	Last Name) for \$(Leads.Company)
		e Date	Trigger Date 👻 plus	is + 2 Day(s) +
CONDITION 1	Stat	tus	Not Started 👻	
	Pric	prity	Highest 👻	
+ Add another condition	Ø+ In Taske	igned io	Select Users ~	A the task to a sure; it will be automatically assigned to the Record Owner.
	Follow Field U	Notify Assignee		
	Lead	Remind Assignee		
	+ ACTIC		1 day before due date	е × at 10:30 АМ
			Alert Mode: O Email O Pop-up	
	Des	scription		
	01	Type # to insert merge field		Seve and Associate Canvel
Save Cancel				
Costs Costrait C	A Here is your	- Smart Chat (Ctrl+Space)		
		<mark>n</mark> os@s	a i 🕐 🖬 🍪 🖉 🕰 🗚	
Pain Point on left side	ts : Wh e. Whe	en I create/assign ne n I click the edit all th	ew task/fi	eld update/email notification/webhooks the button alignment is alignments are different.
Solution:	Need t	to follow the similar s	tyle to all	the buttons for create&Edit pages.
Conclusio	on:		, <u> </u>	······································

Page Name : Workflow - Criteria	
Which accounts would you like to apply the rule to?	
Accounts matching certain conditions All Accounts	
1 None None	+
	Next
Which leads would you like to apply the rule to?	
Leads matching certain conditions	et any of the above conditions
1 Account • is • erdf	+
	Cancel Next
	Z⁺ Scheduled Actions
Execute 2 Hour(s) - After Rule Trigger Date	Execute 3 Hour(s) After Rule Trigger Date Next Cancel
Next Cancel	Email Notifications asdfghj
Pain Points: Used cancel for some places with different align	ment.
Solution: Need to keep consistency across all the criteria edi	tor.
Conclusion:	

Page Name : Workflow	- Add new criteria	a, Save button	
Chrome File Edit View History Bookr Solution → C ← crm.zoho.com/crm/org687371934 Apps ← Zoho ← Design Ref ← Imported From	narks People Tab Window Help X III, ListVie X III Zoho C X III Zoho I/settings/workflow-rules/39333240000010 Fir S Order Flow - Eagl M Highcharts of	inho C x ₽ Zoho C x ₽ Zoho C x ₽ Zoho C x ₽ Zoho C x № Zoho C x № Zoho C x ↑ 0 173129 ☆ 0 demos 10 rules for better 11 Data Tables Desig 12 Design Systems G	
⊟ Home Leads My Jobs Accounts Deel	is Reportyt Analytics Activities Q	Quotes Sales Orders •••	
WHEN This rule will be ex	ecuted when a lead is created.		2). 20. 20.
CONDITION 1 Lookup1 IS	zoho		ž.
+ Add another condition Tasks Follow up - \$[Leads. Field Updates	ns Exe Last Name) for \$(Em asc	Scheduled Actions ecute 3 hour(s) AfterRule Trigger Time nall Notifications dfghj	10. 40.
Lead + ACTION	+A	ACTION Add New Scheduled Action	ab.
Save Cancel	t Chat (Ctrl+Space)	। ় ଝ ଝ ซ 🧃 ଝ 🖻 🏹 ଓ 🔶 ଝ'⇔∣ 🗖 🗊	□ AskZia (注) ひ Zậ 〇 已 ,

- 1. "+" Add" used in the same place.
- 2. Call to action should convey the clear message.

Solution:

- 1. Need to remove the "+" from add another condition. This should be (Add New condition/ "+ condition")
- 2. Need to change the call to action "save" as "Save Rule". This is more meaningful than having a save.

Rules Usage					
Workflow Rules					⑦ Help
Norkflow rules allow you to perform	ecertain automatic actions on specific records b	based on filter criteria. Workflow aut	omations can send e	mails, update fields, cre	eate records and muc
Search Q			Save	Cancel + C	Create Rule
Rule Name	Leads ┰	Execute On	Actions	Last Modified	All Status y
≡ sample	Leads	Create	3	Oct 29, 2019	
≡ adfsghj	Leads	Create	1		
Points : When I cli bose of having reord	ck the reorder button I hav ler button here? Is this the	e an option to reord order system need	er my rules. to validate ti	But why? W he rule one b	hat is the y one?
ution: Need to give	some criteria for reorder s means show the purpose o	o that user can choo of button hint for "rec	ose the orde order button'	r in the criter ' so that as a	ia rules. In tl user everyc

Page Name : Workflow -	Lock Rule		
My Jobs Accounts Deals Repo	Lock Rule	×	Q 4 +
	Please explain why you're locking this rule. This will help other administrators understand how changing it will affects your CRM.		
his rule will be executed when a lead is			
	Lock		
1) Lookup 1 IS zoho			
Pain Points: Different but	ton alignment.		
Solution: Primary action	should be right side and the secondary on left side.		

Page Name : Workflow -	Alert message
My Jobs Accounts Deals	Please note that when you delete a workflow rule, all the instant and scheduled actions will be disassociated from this rule. Are you sure you want to delete the rule? Cancel Yes, delete
Accounts Deals Repo	Confirm You are trying to deactivate a workflow rule with scheduled actions that may have been scheduled for some records. You can choose one of the options listed below for the schedules that are associated to the records. Choose an option: Delete the Schedules Do Not Delete the Schedules Continue Cancel
Pain Points: Different sty	le for alert/delete popup.
Solution: Need to follow	the same style for all the alert/info messages.
Conclusion:	

Control of the con	<pre>i i i i i i i i i i i i i i i i i i i</pre>	Chrome File Edit View	History Bookmarks	People Tab Window H	elp			🛐 🚳 🕻 🛕 58d 🖇 🎅 🔹 71% 🔳 Wed 10:28 PM Q
In the case of	<pre>in a calculation of the cal</pre>	● ● 🔄 (7) - × 😅 Cliq ×	$ $ \mathbb{E}_{P} Butte X $ $ \mathbb{E}_{P} Li	stV 🗙 😥 Zoho 🗙 😥 Zoho	🗙 😥 Zoho 🗙 😥 Zoho 🗙	🛛 😥 Zoha 🗙 🗍 😥 Zoha	x 📴 OLX x 💩 Cale x 🕻	Supe X 🖸 Bigil X G sale: X 🏀 Sear X 🕂
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Setup Pipeling Norm Pipeling	<pre>setup per long in the prime to informate to the prime to the prim</pre>	Home Leads Contacts	My Jobs Accour	Create New Stage - s	Standard	-		
Sandard Upon Sandard Upon Very Cale Caleson Stage Open Peorline Open Peorline Peorline Device Peorline Peorline Caleson Stage Open Peorline Peorline Caleson Stage Open Peorline Peorline Peorline Peorline Peorline Cale Peorline Peorline Peorline Cale Peorline Peorline Peorline Cale Peorline Peorline Peorline Peorline Peorline Cale Peorline Peorline	Image: Second and a second a	Setup	Pipeline	STAGE NAME	PROBABILITY (%)	FORECAST TYPE	FORECAST CATEGORY	۲
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<pre>www.industry increases Management hannels wate Administration harketplace www.ioper Space www.ioper Space Pipelines his page allows you to manage various sales processes by organising the Deal stages in different pipelines. ayout Standard • Standard (Standard) 20 rew on 6 Qualification Needs Analysis Velue Proposition</pre>	Standard (Standard) In Points: 1. Button alignment is different. 2. Here the function is creating a new pipeline but we use "+". + explain the add new.	Individuons	Closed					_
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All Control of the synce Sharing X Representation of the synce Sharing	Pipelines Interpretation of the state of the st	Developer Space						
Image:	Pipelines Standard (Standard) 20 Weeds Analysis Value Proposition In Points: 1. Button alignment is different. 2. Here the function is creating a new pipeline but we use "+". + explain the add new. In Needs In Standard In the primary on left side and cancel on right side.	eaga						
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Pipelines This page allows you to manage various sales processes by organising the Deal stages in different pipelines. ayout Standard Standard Oulification Needs Analysis Value Proposition	Pipelines (3) This page allows you to manage various sales processes by organising the Deal stages in different pipelines. ayout Standard (* New Pipelin Standard (Standard) 20 I I I I I I I I I I I I I I I I I I							
his page allows you to manage various sales processes by organising the Deal stages in different pipelines. ayout Standard • New Pipelin • Standard (Standard) 20 new one 6 • None- Qualification Qualification Needs Analysis Needs Analysis Value Proposition Value Proposition	his page allows you to manage various sales processes by organising the Deal stages in different pipelines. ayout Standard • • New Pipelin • None- Qualification Qualification Needs Analysis • Value Proposition in Points: 1. Button alignment is different. 2. Here the function is creating a new pipeline but we use "+". + explain the add new. lution: 1. Need to align the primary on left side and cancel on right side.	Pipelines						(
Ayout Standard - Standard (Standard) 20 new one 6 Qualification Qualification Needs Analysis Value Proposition	ayout Standard • • New Pipelin • None- Qualification Needs Analysis • Value Proposition in Points: 1. Button alignment is different. 2. Here the function is creating a new pipeline but we use "+". + explain the add new. Iution: 1. Need to align the primary on left side and cancel on right side.	his page allows you to ma	anage various sal	es processes by organis	sing the Deal stages in d	ifferent pipelines.		
Ayout Standard Standard (Standard) 20 new one 6 Qualification Qualification Needs Analysis Value Proposition	ayout Standard • • New Pipelin • Standard (Standard) • New Pipelin • None- Qualification Qualification Needs Analysis Value Proposition Value Proposition in Points: 1. Button alignment is different. 2. Here the function is creating a new pipeline but we use "+". + explain the add new. lution: 1. Need to align the primary on left side and cancel on right side.							
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Standard (Standard)20new one6-None-QualificationQualificationQualificationNeeds AnalysisNeeds AnalysisNeeds AnalysisValue Proposition	 Standard (Standard) 20 None- Qualification Needs Analysis Value Proposition in Points: Button alignment is different. Here the function is creating a new pipeline but we use "+". + explain the add new. lution: Needs to align the primary on left side and cancel on right side. 							
-None-QualificationQualificationNeeds AnalysisNeeds AnalysisValue Proposition	-None- Qualification Qualification Needs Analysis Needs Analysis Value Proposition in Points: 1. Button alignment is different. 2. Here the function is creating a new pipeline but we use "+". + explain the add new. lution: 1. Need to align the primary on left side and cancel on right side.	Standard (Standard)	20	new one	6			
Qualification Needs Analysis Needs Analysis Value Proposition	Qualification Needs Analysis Needs Analysis Value Proposition in Points: 1. Button alignment is different. 2. Here the function is creating a new pipeline but we use "+". + explain the add new. lution: 1. Need to align the primary on left side and cancel on right side.	-None-		Qualification	i			
Needs Analysis Value Proposition	Needs Analysis Value Proposition in Points: 1. Button alignment is different. 2. Here the function is creating a new pipeline but we use "+". + explain the add new. lution: 1. Need to align the primary on left side and cancel on right side.	-None-		Needs Anal [,]	ysis			
	 in Points: 1. Button alignment is different. 2. Here the function is creating a new pipeline but we use "+". + explain the add new. lution: 1. Need to align the primary on left side and cancel on right side. 	Qualification		Value Propc	sition			
	 in Points: 1. Button alignment is different. 2. Here the function is creating a new pipeline but we use "+". + explain the add new. Iution: Need to align the primary on left side and cancel on right side. 	Qualification						
	 Button alignment is different. Here the function is creating a new pipeline but we use "+". + explain the add new. Intion: Need to align the primary on left side and cancel on right side. 	Qualification Needs Analysis						
in Points:	 Here the function is creating a new pipeline but we use "+". + explain the add new. Intion: Need to align the primary on left side and cancel on right side. 	Qualification Needs Analysis						
in Points: 1. Button alignment is different.	lution: 1. Need to align the primary on left side and cancel on right side.	Qualification Needs Analysis in Points: 1. Button alig	gnment is	different.				
 in Points: 1. Button alignment is different. 2. Here the function is creating a new pipeline but we use "+". + explain the add new. 	Iution:1. Need to align the primary on left side and cancel on right side.	Qualification Needs Analysis in Points: 1. Button alig 2. Here the f	gnment is function is	different. creating a ne	ew pipeline bu	It we use "-	+". + explain the	e add new.
 in Points: 1. Button alignment is different. 2. Here the function is creating a new pipeline but we use "+". + explain the add new. 	 Need to align the primary on left side and cancel on right side. 	Qualification Needs Analysis in Points: 1. Button alig 2. Here the f	gnment is function is	different. creating a ne	ew pipeline bu	t we use "⊣	+". + explain the	e add new.
 in Points: 1. Button alignment is different. 2. Here the function is creating a new pipeline but we use "+". + explain the add new. 		Qualification Needs Analysis in Points: 1. Button alig 2. Here the f Jution:	gnment is function is	different. creating a ne	ew pipeline bu	it we use "-	+". + explain the	e add new.

Page Nan	Page Name : Pipeline - Create New								
Repc	Create Pipelin	e							
	Pipeline Name	new							
anage	Layout	Standard							
	Stages	Add Stages							
20	Set as Default								
		Cancel Save							
_		Neeus Analysis							
Pain Points : CTA is different. We use save for edit and other places. For creating a new one why we use the same.									
Solution:	we can use "Create"	so that it looks more relavant to this page.							
Conclusio	on:								

Page Name : Segment	ation			
Accounts Deals Reportyt A	Add New Label Enter the label name and i	ts respective recency, frequency and monetary		
	score in numerals or range	e. Eg: 4,4-5		
v you can start labelling seg	Label Name			
te labels for different patterns of Kr	2	E.L.		
	Recency	Enter a score		
ment labels	Frequency	Enter a score	Frequency	
jment Labels	Monoton	Enter a score	Frequency	
ampion	Monetary		4-5	
ral customer		Submit Cancel	4-5	
cent customer			1	
mising		3	1-2	
stomer needs attention		2-3	2-3	
Accounts Deals Reportyt ,	Edit			
T SEGMENT	Linking field	Account Name		
	Recency field	Created Time -		
Segmented On : Accounts	_	By count By field	nking field : Account Name	
	Frequency field		onetary field : Sub Total	
lecency neid . Oreated finite	Monetary field	Sub Total 🔹		
Segmentation Rule Entry		Save Cancel		
This rule will be executed for all Acco				
Contacts My Jobs Accounts Add C	riteria		Q / +	1
Segmented On	anteria -		ame	
Recency field :	Created Time * is *	10/31/2019 01:00 AM	+ 1	
Q			2 mil	
Segmentation		Submit	Cancel	
This rule will be executed t	for all Accounts.			
Pain Points: All button :	alignment is diffe	Prent		
Solution: Need to align	the primary but	ion on the right side. And car	ncei on the left side.	
Conclusion:				

Page Name :Segmentation - Add Criteria						
	Recency	Frequency Monetary				
	Score	Criteria				
	5	+ Add Criteria				
	4	+ Add Criteria				
	3	+ Add Criteria				
	2	+ Add Criteria				
	1	+ Add Criteria				
Pain Points: "+" and "Add" used in the same place.						
Solution: Need to remove the "+" from the beginning/Use "+Criteria" instead.						
Conclusion:						

je Name : Blue	eprint				
Blueprints Usage					
Blueprint					
Design and define a proces	s that matches your organizational po	licy while making sure that y	your data is streamlined ar	nd adhere to your team's work style	and method.
Note: * denotes the dra	ft copy of the published blueprint.				
Search	Q			Reorder Blueprint	+ Create Blueprint
Blueprint	All Modules 🛛	Layout	Field	Last Modified	All Status ア

Page Name : Blueprint - Deactivate						
Accour	Attention!					
Blueprints	There are 3 records associated with this Blueprint.					
	You can either,					
luepr	 Continue processing the records with this Blueprint 					
esign and	 Exit all records out of Blueprint with last known state 					
Note: *						
Search				Cancel	Deactivate	
Blueprint		All Modules 🔽	Layout	Field	Last Modified	
Pain Points: Different style for alert/delete popup.						
Solution: Need to follow the same style for all the alert/info messages.						
Conclusion:						

Page Name : Blueprint						
My Jobs En	try criteria for this Blueprint			Records that are already into this Blueprint	t will not be modified.	
1	Account *	is 🔻	zoho\$	+		
					ayout: Stan	
				Do	ne Cancel 5\$	
	. /				Available States +	
My Jobs Accour	Create new Bluer	orint			Q 🗳	
Blueprints	Blueprint name		test			
	Module		Leads 👻			
Bluepri Design and	Choose Layout		Standard 👻		aam's work style and me	
Note: *	Choose field 👔		Lead Status 👻		eans work style and me	
Search	Define criteria for which Leave this field blank if you v	records are associated w vant all records to be eligible	vith this Blueprint.		Reorder Blueprints	
Blueprint	1 Account *	is 👻	zoho\$	+	dified /	
Task Proce	Description					
Task Proce				Advanced configuration	t 24, 2019	
				Next Cancel		
	_					
Pain Points : button alignment - When we use the call to actions on the right side need to follow the primary on the right side and the secondary on the left side.						
Solution: Need to follow the button alignment						
Conclusion:						
Page Name : Blueprint						
--						
\equiv Home Leads Contacts My Jobs Accounts Deals Reportyt						
Simply dra						
Publish Save as Draft Cancel						
Pain Points: Two primary button next to each other gives some confusion on what to do first.						
Solution: Publish should be primary and the "Save as draft" should be secondary.						
Conclusion:						

Page Name : Blueprint - Transition					
Start (-None-)	Info and States Transitions				
	Transition name				
Pre-Qualified	Description				
Contact in Future	Save				
Pain Points : Every transitions and every actions have cancel next to the save. When I don't have "cancel" here suddenly I don't understand how to cancel this transition.					
Solution: Need cancel button here to cancel this transitions.					
Conclusion:					

Page Name : Blueprint - Al	ert message	
Contacts My Jobs Accounts Deals	There are one or more loops found in your Blueprint. When stuck in a loop, record remains inside this Blueprint with no possible exit through transitions. Review Save anyway	Continuous + Description Module: Leads Layout: Standard
Pain Points: This alert mess	age is not readable. And totally out of all other models.	
Solution: Need to follow the	same style for all the alert/info messages.	
Conclusion:		

Page Name : Blueprint - Button alignment		
Info and States Transitions		
EMAIL NOTIFICATION Lead Associate existing Name	testing fsgdfhcdxfbc	
Email Recipients Choose recipients	BEFORE DURING	AFTER
Additional Recipients	INSERT MESSAGE AND FIELDS:	
Email Template Select Template	☐ Make Notes as mandatory	$\uparrow \downarrow$
Done Cancel	☐ Make Attachment as mandatory	$\uparrow \downarrow$
	+ ADD	
 Pain Points: 1. Used two different alignment buttons in side I 2. "+" and "ADD" convey the same message. W 	Nav bar. /hen I see this first time I got a question	n "Add What"
 Solution: 1. Need to follow the same style in all the place 2. We can use "Add Action" as CTA literal. 	S.	
Conclusion:		

Page Name : Blueprint - show recipients, Select ter	nplate
Info and States Transitions	
← EMAIL NOTIFICATION Lead Associate existing	← EMAIL NOTIFICATION Lead Associate existing
Name	Name
	sample
Email Recipients Choose recipients	Email Recipients Show recipients
	Additional Recipients
Email Template Select Template Done Cancel	ewrgehg Email Template Select Template Sfdghn From vignesh.gnanasekaran@zohocorp Add Reply To Done Cancel
 Pain Points: 1. Show recipients & Select template not look like 2. When I choose the recipients I don't get any information template name showed here. Two different type 	a button. o about recipients. When I select template I got the es of input buttons used here.
Solution:1. Need to create new button style for this/follow th2. Need a consistency in all the input selection but places.	he existing style. ttons. If we showed in a place need to follow in all other
Conclusion:	

Page Name : Blueprint - Alert Message	
My Jobs Accounts Deals Repc (1) You have not saved your changes. Are you sure you want to move away from this page? Yes, Leave Page Stay Here	Info and States test Continuous + Description
Pain Points: Different style for alert/delete popup.	
Solution: Need to follow the same style for all the alert/info messages.	
Conclusion:	

Ρ	age Name : Approval Process				
	Approval Process Automate the submission of records for approval from one or more managers using app	roval process.			
				Reorder Processes	+ Add Approval Process
	PROCESS NAME	MODULE -	EXECUTE ON +	#RULES	STATUS -
	City is Chennai_Approve vickey	Leads	Create or Edit	2	
	fhgjhkj	Contacts	Create	1	
Ρ	ain Points: + & Add used in the beginning. It's act	ually creating a n	ew one.		
S	olution: Need to remove "+" and the call to action	should be Create	e approval	process.	
С	onclusion:				

Page Name : Approval Process - Create New				
New Approval Process				
Module	Module 👻			
Name	Name			
Description	Description	1.		
When to Execute	Record Creation Record Edit			
+ Add Rule to this process Cancel				
Pain Points: Title and call to action is differen	t. Primary action not look like a primary button			
Solution: When creating a new approval process the creating part should convey the message. So the title should be "Create New approval process" and need to remove "+" in the beginning. Button style should be primary here.				
Conclusion:				

Page Name : Approval process - description	
sample dfsrezhrtnnsmzns dgzksejtnh	
Pain Points: When I add the description there is no save/cancel/done button to save the description.	
Solution: Need to use save/cancel icon/button what we followed in other places.	
Conclusion:	

Page Name : App	proval process - A	dd Task	
Г			7
Assign Task	qwertyuio	•	
0 - 1:	qwertyuio	Preview	
5. Action(s) upon 7	task assign		
Configure Action After	+ Cr	reate Task	
Update Fields			1
Pain Points: 1. "+" before 2. When I clic	Create New. ck the preview it do	esn't work like preview,	edit opens in a popup.
Solution: 1. Need to re 2. There is no	move "+" and use to need to preview h	the Create task alone. here. Need to change the	e text as "Edit"
Conclusion:			

Page Name : A	pproval Process - pre	eview		
É Chrome File Edit View Histo	ry Bookmarks People Tab Window Help		🔯 🕲 🕻 🛓 58d	浅 🤶 ■1) 48% ■D Thu 12:04 AM Q :三
● ● ●	Butt: x EL ListV x 😥 Zohc x 😥 Zohc x 😥 Zohc x	😥 Zohc 🗙 😥 Zohc 🗙 😥 Zohc 🗙 🔤	DLX 🗙 🧙 Cale 🗙 🖸 Supe 🗙 🖸 Bigil	I 🗙 G sale: X 📵 Sear X +
\leftarrow \rightarrow C \triangleq crm.zoho.com/crm/org	687371934/settings/approval-process/create		🖈 🖸 🕮 🖓 🖄 🗶 🧨 🛛	
👖 Apps 📄 Zoho 📄 Design Ref 🗎 Imp	ported From Fir 🧿 Order Flow - Eagl 🦙 Highcharts demos 🗓	🛛 10 rules for better 🚺 Data Tables Desig 🕤	Design Systems G 💿 Design Starter Kit	Dropdown Sema » »
\equiv Home Leads Contacts My	Edit Task - Leads		×	
Setup	This task will be automatically assigned to the next approver. Subject	qwertyuio		Execute On Create Only -
Search Q	Due Date	Record Submission date plus 1 Day(s)	*	
General Users and Control	Status	Not Started 👻		
My own Customization	Priority	High 👻		
Automation	☑ Notify Assignee		Notification emails will be sent only to active and confirmed users.	
Process Management	Remind Assignee			nd set the order in which their approval is given.
Blueprint		Same day as due date 👻 at 01:00 A	м	
Approval Processes		Alert Mode:		
Orchestration	Description			
Channels				un pertorna ante a recent na prese approven.
Data Administration	Type # to insert merge field		Save and Associate Cancel	
Marketplace	ų.			
feaga	Update Fields			
	Carlinum Anton Alter Final Annual			
	Conngure Acoon Anter Final Approva			, 0 ,
Cheta Chernela Certaita	e is your Smart Chat (Ctrl+Space)	ñ 🖪 🛞 🖻 🌍 🗐 🕢 😽 🍪 🛱 🗐		Ask Zia (22) D 766 O O
Pain Points: Bu	utton alignment is differ	ent.		
Solution: Prima	ary button should be on	the right side ar	nd the secondar	ry on the left side.
Conclusion:				

Dago Namo	· Approval process - Assi	an Task						
rage Name		gii lask						
Contacts My	Assign Task - Leads						×	18
	Q Search					+ New Task]	
Q	Subject		Due Date	Priority	Status	Assigned To		
	vwertyuio		APRule Trigger Date plus 1 day(s)	High	Not Started			
ation	task assign		APRule Trigger Date plus 22 day(s)	High	Not Started			
ent	Associate Cancel						b	e performe
	Update Fields							
Pain Points: 1. Title a 2. +New	: and the CTA is different. v Task for creating a new or	ne.						
Solution: 1. The la 2. For c	abel of CTA should be Assigned the contract of CTA should be Assigned to the contract of the c	gn. should be Crea	ate Task.					

Page Name : App	proval process sav	e
		On 1 st approval vbj
لیّے Update Fields	⊢⊙ Call Webhooks	
Done	Cancel	Save Cancel
Pain Points: Done	e/cancel comes bef	ore save this process. Do we really need this?
Solution: We don	't need done/cance	before save/cancel here.

Page	Name : Approva	l Process - Deactivate	Rule
	EXECUTE ON +	#RULES	STATUS -
	Create	2	
	Create	1	
	Create or Edit	Deactivate Pule	
		Deactivate Rule	
		Do you want to de	eactivate this process?
		Deactivat	e Now Cancel
		_	
Pain F	Points : Button alig	gnment is different.	
Soluti	on: Need to chan	nge the alignment to left	t side.
Concl	usion:		

Page	Page Name : Approval Process - Popup					
My	Assign Task - Leads					×
	Q Search				+ New Task	
	Subject	Due Date	Priority	Status	Assigned To	
	v qwertyuio	APRule Trigger Date plus 1 day(s)	High	Not Started		
	task assign	APRule Trigger Date plus 22 day(s)	High	Not Started		
	Associate Cancel					

My	Email Notification - Leads			×
L	Q Search		+ Create Email No	tification
	Name	Email Template		
	asdfghj	Red		
	v qwertyj	Red		
	fesrdfhg	Red		
	sampledsgrdthfjytkugilolgsdhgfjgkljk	Sfdghn		
	Associate Cancel			
	Capturing Sales Region			
Му	Call Functions - Leads		+ New	Function
	Name	Description	Language	
	Capturing Sales Region	Global sales region is geographically categorized	Deluge	
	Associate Cancel			_
	Not Started	- neposran		
Pain	Points: Repeated issues for create new	w button.		
Solut Need	ion: Some popup has "+New" "+Create to follow the same button style for cre	e" like that. ating the "New" from popup. So	that everything looks o	consistent.
Conc	lusion:			

Page Name : Approval Process - Add another rule
sample Module Leads Execute On Create Only
1 Account IS sdgdfxtnf AND 2 Annual Revenue = 3455677
 Pain Points: 1. Primary action button style is different. 2. Here the action is adding another one so the CTA should be "Add another rule/Add new rule". Need to remove the "+"
 Solution: 1. This should be Primary blue button. 2. Here the action is adding another one so the CTA should be "Add another rule/Add new rule" & Need to remove the "+".
Conclusion:

Page Name : Approval Process - Repeated buttons	
Save	Reorder Rules + Add Another Rule
City is Chennai_Approve vickey Add Description 1 1 Country IS india OR 2 Appust Pervenue = 1000000	Vodule Leads Execute On Create or Edit -
Pain Points: 1. Repeated call to actions. Reorder rules and add another rules used at the	ne top and the bottom.
Solution: 1. Need to remove the repeated buttons in the bottom.	
Conclusion:	

Page Name : Approval Process - delet	e rule		
 Imported From Fir My Jobs Accounts Deals Reportyt Ana City is Chennai_Approve vickey Add Description 	crm.zoho.com says Do you want to delete this rule from this app	roval process? Cancel OK	sign Systems G
1 Country IS india OR 2 Annual Revenue = 1000000 Vignesh G / Prakash Sekar		Dete	eted <u>Undo</u>
Pain Points: 1. Showing the browser popup style 2. When I delete the rule we showed	gives confusion. d the thumbnail and option to "Undo	o" the deleted rule.	
Solution:1. This all functions are totally difference.2. We don't follow this style in any or undo the actions.	ent from other features. ther places. If used delete the reco	rd it will be deleted and	I not able to
Conclusion:			

ge Name : Ch	annels - Email configuration
Email Sharing Permissic	ins
 Private - Only Me Keep my customer emit 	uil conversations private.
Public - Share with Share my customer em	ails with other users in my organization.
Custom - Record-Level	Sharing ustomer emails to share with other users.
	Save Cancel
Chrome File Edit View	ــــــــــــــــــــــــــــــــــــ
Inbox - Zoho Mail (vignes)	igne x 😥 Zoho CRM - Setup Page x 😥 Zoho CRM - Setup Page x 🏚 Settings x 🛛 YouTube x 🖸 Top 11 X Facts Tamil Mei 🐗 x +
→ C 🔒 crm.zoho.com/crm	/org687371934/settings/email-configuration/email-settings?action=mailSelect 😓 0 🐵 7778 🌢 🔅 🖍 🧖 🛱 😒 🙆 🐵 🔝 😐 🕹 🗄
pps 🗎 Zoho 🗎 Design Ref 🛽	🗄 Imported From Fir 🤡 Order Flow - Eagl 🦙 Highcharts demos 🔟 10 rules for better 🚺 Data Tables Desig 🍞 Design Systems G 🧿 Design Starter Kit 🚺 Dropdown Sema »
Home Leads Contacts I	hy Jobs Accounts Deals Reportyt Analytics Activities Products Quotes … Q 🗳 + 🖻 🖂 💥 🁘
etup	Email Configuration Email Parser BCC Dropbox Email Deliverability Email Intelligence
Search Q	Mainwagnet C
eneral sers and Control	Label the emails in your Mailbox 🜑
y own Customization	Categorize the emails in your mailbox using labels generated based on the 'Potential Stage' and 'Closing Date'.
ocess Management	Deals CTM 🔞
nannels	Open Deals ()
Email	Customers 💿
Telephony Social	Email Sharing Permissions
Chat	Private - Only Me Keep my customer email conversations private.
SalesSignals	O Public - Share with
Portals	Share my customer emails with other users in my organization.
ata Administration	Custom - Record-Level Sharing
arketplace	Let me choose which customer emails to share with other users.
eveloper Space	Update
	0
vs Channels Contacts	Here is your Smart Chat (CtrH-Space)

Pain Points:

- 1. Button style and alignment is different while adding a new email ID.
- 2. Without doing any actions the primary buttons visible at all times gives confusion about what I have changed.

Solution:

- 1. Need to follow the default button style. Here all the details in left so alignment should be left side.
- 2. Button should be disable by default. It should be enabled once the user changes anything.

Page	Name : Channels -	Email configuration public	
My Jo	bbs Accounts Deals Email Configuration MailWagnet Zoho CRM can intelligently Time of the emails will be n	You have chosen to share the email communications from Leads and Contacts with other users. All users within this Zoho CRM account can view all communication with the Leads/Contacts. We strongly recommend that you specify your email domain in the <i>Exclude Domain(s)</i> field. With this, you can restrict access to confidential emails sent or received from your colleagues. For more information, click Online Help.	e notifications in MailMa
	Label the emails in your M Categorize the emails in you	Mailbox C	
Pain	Points [.]		
1.	When I configure m And used the differe	y email private to public I got summary with confirm text. Which is i ent style for buttons.	not clear to read.
Solut	ion:		
1.	Alert/info needed to purpose of this pop	o follow the similar or same style. Here We need to give the clear in up and need to follow the default button style and alignment.	fo about the

age Name : Channels - Email configuration/Organization emails				
Email Configuration Email Par	ser BCC Dropbox Email Deliverability Email In	telligence		
Email Email Sharing	Organization Emails			
Organization Email A Add the email addresses of your v addresses have to be verified before New Email Address	Addresses arious departments from which you send and receive cus are you can use them.	stomer emails. You can use these address	$\ensuremath{\overline{\ensuremath{\mathcal{R}}}}$ es as the 'From' and 'Reply to' addresses. The email	
DISPLAY NAME	EMAIL ADDRESS	CONFIRMATION STATUS	WHO CAN USE	
555	10@dfdf.vom	Click to confirm	Administrator, Standard	
vignesh	vigneshtest123@gmail.com	Click to confirm	Administrator, vickey New	
vickey	vickeytest123@gmail.com	\checkmark	Administrator	
vignesh1234	vigneshg@gmail.com	Click to confirm	Administrator, vickey 2	
In Points : Primary action is placed in different position. Plution: All the primary button in the list page(feature) should be right side. Need to follow the same style in the places.				
Inclusion:				

Page Name : Channels - Email parser
Email Configuration Email Parser BCC Dropbox Email Deliverability Email Intelligence
Email Parser
Automate the process of extracting customer information from incoming email and add them as records in CRM. If an email containing customer information uses the same template, you can automate record creation in CRM with the Email Parser. Create a parser mailbox for each template, configure parsing details, and start sending those emails to the parser email address.
No parsers have been created yet
Pain Points: Primary action is placed in different positions.
Solution: All the primary button in the list page(feature) should be right side. Need to follow the same style in all the places.
Conclusion:

Page Name : Channels - Email configure
Deals Would you like to deactivate the integration? Juration
Email Sharing Organization Emails
Accounts Deals I would like to enable Mail Magnet functionality by storing email meta data. Confirm Cancel Email Email Sharing Organization Emails
 Pain Points: 1. Different style for alert/delete info. There is no detailed info here. If a user deactivate the integration we should inform the problem of deactivating.

For enabling the mail magnet we don't show this kind of popup while activate other process/feature.

Solution: Alert/info button should be consistent in all the places.

Page Name : Channels - Email deliverability
Email Configuration Email Parser BCC Dropbox Email Deliverability Email Intelligence
Email Authentication Email Relay
Email Authentication + Add domain Improve deliverability of emails sent from Zoho CRM by adding SPF (Sender Policy Framework) and DKIM (Domain Keys Identified Mail) in your DNS settings.
Email Configuration Email Parser BCC Dropbox Email Deliverability Email Intelligence
Email Authentication Email Relay
Email Relay Settings Image: Send emails from your company's server by setting up relay server(s) and enhance deliverability of bulk emails Image: Send emails from your company's server by setting up relay server(s) and enhance deliverability of bulk emails
+ New Server
Pain Points:
 "+" and "Add" conveys the same message. Alignment is different.
Solution:
 Need to remove "+" and keep the CTA as "Add Domain" "Add New Server" We need to follow the same style for create new button here. All the primary buttons are placed in the right hand side. So we need to follow the same here.
Conclusion:



2. We can use "+New email" here.



Page Name : Telephony



Page Na	me : Social - Branding	
Orchestration	Contacts My Jobs Accounts Facebook account details Facebook accounts configured	× Q 42 + 13
٩	Vickey Vignesh Cancel Delete and	Use account
ion	Vickey @Vickey16192	Mar
ent	Actions	Permissions
	Can Tweet, Reply to Tweets and Direct Message (DM), Retweet, Favorite, and View.	Administrator vickey 2 × sf × rockey × kjbkjbkj × Test × sdfd: + Add Profile
	Can only Reply to Tweets and DM, Favorite, and View.	+ Add Profile
	Can only View.	+ Add Profile
Pain Poir my accou me to del	nts: This is totally a different approach for adding the a int and unfortunately not mapped my page. Again I'm c ete my account and add a different account.	ccount. This popup comes once I logged into licking the add account it comes. It suggest
Solution: come as a	: Add Account/Use account is relevant to this action an a primary and it will be an option to be shown nearby p	d it should be Primary here. Delete should not rofile.

Page Name : Social - Branding	
Brand Settings Admin Settings Automate Lead Generation	
Import Brands from Zoho Social NOTE: You are importing brands from donbosco.	1 Brand selected. Clear all Import
Brand Settings Admin Settings Automate Lead Generation	
Brands	
New Brand Connected to: + Vickey16192	
f V6 Design Studio Create New Brand	
NOTE: This account is synced with donbosco in Zoho Social.	
 Pain Points: 1. For import the brand I have to select the brand and then I have to import. I for the first time? 2. Once I add my social media it will be visible in a card and the "create new 	Do we really need this import brand" is in a different style.
 Solution: 1. No need of import for the first time, We have to place the import on the bra button for Create New brand as common. 2. Create New brand should be common. We have to follow the button style of the button sty	and card/we have to place the



Page Name : Social - Admin settings	
Vickey @Vickey16192	Manage 🧄 🖞
Actions	Permissions
Can Tweet, Reply to Tweets and Direct Message (DM), Retweet, Favorite, an	Administrator vickey 2 × sf × rockey × kjbkjbkj × Test × sdfds × + Add Profile
Can only Reply to Tweets and DM, Favorite, and View.	+ Add Profile
Can only View.	+ Add Profile
Brand Settings Admin Settings Automate Lea Social Permissions Social Admin Social Admin Admin	ad Generation Iministrator vickey 2 × sf × rockey × kjbkjbkj × Test × fds × + Add Profile Iministrator Standard × sf × vickey New × rockey × kjbkj × Test × + Add Profile
Social Profiles Ad rod rod Pain Points: "+Add Profile used in all the plate Solution: Need to remove "+" and make the	Iministrator Standard × vickey 2 × sf × vickey New × ckey × + Add Profile
Conclusion:	

Page Name : Soci	al - Brand	
n Contacts My Jobs Brand Settings Brands	Are you sure you want to delete this social brand account from CRM? WARNING: Deleting the brand will delete all social accounts and related data associated with the brand.	
Pain Points: Used	different popup style here.	
Solution: Need to t	follow the similar style for delete/alert popup.	
Conclusion:		

Page Name : Chat			
Visitor Tracking (powered by Zoho Salesk	۵)		Help 👻
Follow these instructions:			
 Copy and paste the code on all your web pages If you are not sure how to add the tracking code 	to track activity or chat with visitors. Place it in the source to your website, please click "Send to Webmaster" to ser	e code just before closing the <body> tag. nd the embed code and instructions to your</body>	webmaster or web developer.
Choose Portal dfghn 👻			Settings
WEB EMBED NAN ✓ dfghn	DEPARTMENT	STATUS	
dfghn + Associate more Portals.	dfghn	1	Embed
	Click here to Deactivat	te	
Pain Points: "+ Associate more meaning.	portals" Here I'm actually Asso	ociate new portal but u	sed the "+" gives differnt
Solution: Need to remove the "-	r" from the beginning.		
Conclusion:			

Page Name : Chat - Integra	ation		
Contacts My Jobs Accounts	SalesIQ - Add Porta	al	
	Portals available to configure	dfghn 👻	
	Portal URL	https://salesiq.zoho.com/dfghn	ors
		Cancel Associate portal	
Pain Points: Here the title a	and the description is diffe	erent. Are we adding the portal or asso	ociate the portal?
Solution: Need to follow the be associate portal.	e same literal for title or th	e button. Here we have existing porta	al so the title should

Page Name : Chat - Visitor Tracking				
Contacts My Jobs Accounts Visitor Tracking (powe	Visitor Tracking All visitors who provide be pushed to your Zoh	g Configuration: e an email address while visiting your website will to CRM account.		
Follow these instructions:	Push new visitors as	Contact		
 Copy and paste the code on If you are not sure how to add 	Assign these Contact to Visitor Notification	Chat Attendee ♥User Vignesh G ♥	efore closing the <body> tag.</body>	
Choose Portal dfghn WEB EMBED NAME dfghn		Save Cancel	STATUS	
		Click here to Deactivate		
Pain Points: Button alignment is different.				
Solution: Primary should be on the right side and the cancel should be on the left side.				
Conclusion:				

Page Name : Chat - Visitor Tr	acking	
Visitor Tracking (powered by Zoho Sales	Q)	Help 🔻
Follow these instructions:		
 Copy and paste the code on all your web page If you are not sure how to add the tracking code 	s to track activity or chat with visitors. Place it in the source code just before closing the <body> tag. e to your website, please click "Send to Webmaster" to send the embed code and instructions to your webmaste</body>	r or web developer.
Choose Portal dfghn 👻		© Settings
WEB EMBED NAME	DEPARTMENT STATUS	
dfghn	dfghn 🗸	Embed
Contacts My Jobs Accounts	Click here to Deactivate Deactivate	
Visitor Tracking (powe	You are about to deactivate Zoho CRM's Visitor Tracking integration. The following changes will take place:	
Follow these instructions: Copy and paste the code on If you are not sure how to add	 The 'Visit Summary' fields will be removed from the Lead and Contact Details pages. Live visitor notifications will be disabled. New visitor information will not be pushed to Zoho CRM. Are you sure you want to deactivate this integration?	efore closing the <body> d code and instructions to</body>
Choose Portal dfghn 👻	Yes, Deactivate Cancel	
WEB EMBED NAME	DEPARTMENT	STATUS
dfghn	dfghn	\checkmark
	Click here to Deactivate	
Pain Points:1. For deactivate the integ2. Button alignment is different and the integeneration of the inte	ration we used switch button in all the places. Here we use erent.	the different style.
Solution: 1. Need to follow the same 2. Button alignment should	e style for activate/deactivate action. I be left side.	
Conclusion:		

Contacts My J	Send Instruct	ions to my Webmaster	
	From	vignesh.gnanasekaran@zohocorp.com	
Visitor Tr	То		
Follow these ir	Subject	Embed Zoho SalesIQ Code in Our Website	
 Copy and 	B Z ∐ abe X₂ X nege ↓	2 <u>A</u> 参 秀 近 Nr 副書書書 語言語語 # 经 ◎ 榮 ⊞ 語 n ⊠ ◎ ♥ « Plain Text	ody> tag.
 If you are 			ons to your we
Choose Portal	<script 19bfe<br="" type="text/j
{widgetcode:">{},ready:function(){ d=document;s=d.c o.com/widget";t=d.</th><th>avascript">var \$zoho=\$zoho II {};\$zoho.salesiq = \$zoho.salesiq II p709705209c8617d9508d4917ba874964a756bd44ce73695660b0324b542", values: \$zoho.salesiq.<u>floatbutton</u>.visible('hide');}}var reateElement("script");s.type="text/javascript";s.id="zsiqscript";s.defer=true;s.src="https://salesiq.zoh getElementsByTagName("script")[0];t.parentNode.insertBefore(s,t);</script>		
WEB EMBED N dfghn	For detailed instruction chat.html#chat-widget	ns please refer to the user manual at http://www.zoho.com/salesiq/help/getting-started-with-live- is	
-	Regards,		-
		Send Cancel	
	_		
Pain Points: Bu	utton alignment is	s different.	
Solution: Prima	ary should be on	the right side and the cancel should be on the left side.	
Conclusion:			

Page Name : Portals				
Portals Portal URL: https://crm.zoho.com/j	portal/DonBosco/crm/login.sas			 Help + New User Type
PORTAL USER TYPE	NUMBER OF USERS	CREATED BY	LAST MODIFIED BY	STATUS
Client Portal Default	0	Aug 12, 2019	Nov 06, 2019	
red	0	Aug 26, 2019	Nov 06, 2019	
test user	0	Nov 06, 2019	Nov 06, 2019	
Pain Points: "+" added	before primary call to	action. And the CTA	name should be relev	vant to the action.
Solution: Button shoul	d be "Create Portal Us	ser".		
Conclusion:				

Page Name : Portals - User Type
Portals
User type Portal Tab Configuration Field Permissions
Portal User Type Portal allow admins to name and customize access for different portal users like clients, partners, vendors or resellers, within a domain. Give a name to the portal user type, then configure its tabs and field permissions. For example, if a portal user is the type of client that's been sourced from a webform and you want to give the access to the portal, you can create a user type with the name "Client" from Webform and click Next to configure it further. Enter Portal User Type partner
Next Cancel
Pain Points: Button alignment is different.
Solution: Need to follow the right side alignment for the buttons.
Conclusion:

Page Name : Portals						
Tabs	Layouts	Permissions	List View	Filter By		
Contacts	Standard ~	View ~	Default List View 👻	-		
Deals	Standard, Locker ${\scriptstyle\lor}$	View ~	Default List View 👻	Contact Name		
Products	Standard 🗸	View ~	Default List View 👻	-		
Quotes	Standard ~	View ~	Default List View	Contact Name		
Sales Orders	Standard ~	View ~	Default List View	Contact Name		
Purchase Orders	Standard ~	View ~	Default List View 👻	Contact Name		
		Next Back				
Pain Points: Butt	on alignment is differe	ent.				
olution: Need to follow the right alignment for the call to actions.						
onclusion:						
ain Points: Button alignment is different. olution: Need to follow the right alignment for the call to actions. onclusion:						

ge Nan	ne : Portal - Configuration	
Standard		
Product	Information	
	Product Owner Lookup	
	Product Name* Single Line	
	Product Code Single Line	
	Product Active	
	Manufacturer Option 1 +	
	Multi-Select Option 1 Option 2	
		Save and Next Finish
n Poin	ts: Two primary buttons are p	blaced in the same place.
u tion: es. We ish" bu	Here the user need to configue e can keep the "Next" for mov atton alone as primary.	ure each and every tabs so we don't need finish button for all the ing from one page to another page and in the last page we have
	be we need to give save cha	nges button instead of these two primary buttons.

Ра	Page Name : Portal - user portal					
~	partner Module for which partner is c Portal Tab Configuration Ec	reated : Contacts			⑦ Help Portal Preview	
	TABS	LAYOUTS	PERMISSIONS	LIST VIEW	FILTER BY	
	Contacts	Standard	View	Default List View		
	Deals	Standard , Locker	View	Default List View	Contact Name	
	Products	Standard	View	Default List View		
	Quotes	Standard	View	Default List View	Contact Name	
	Sales Orders	Standard	View	Default List View	Contact Name	
	Purchase Orders	Standard	View	Default List View	Contact Name	
	Notes	Standard	View	Default List View	-	
	Field Permissions Edit					
Pa hav	in Points: Primar /ing it separately	ry action is missing and th and having edit button he	ere is no data in field re?	permission then what	at is the purpose of	
So	 Portal previe Do we really keep both in 	w is the primary action he need this list view? We h a single edit.	ere. ave two list view here	e. Instead of showing	the title only we can	

Page Name : Port	al - Alert Popup			
Chrome File Edit View Hils G ③ (3) - Inbox - Zoho Mail (∨ x ← → C ■ @ crm.zoho.com/crm/a	story Bookmarks People Tab Window Help 2 Zoho CRM - Setup Page x 2 Zoho CRM - Layouts x rq68/73/1934/settings/client-portal	😥 Zoho CRM - Setup Page 🗙 🏼 🍪 Search Desi	C C A37d X S C C C A C C	
🚻 Apps 📄 Zoho 📄 Design Ref 🗎	Imported From Fir 🧿 Order Flow - Eagl 🦙 Highcharts demos.	👿 10 rules for better 🚺 Data Tables Desig	Design Systems G 🔮 Design Starter Kit 🛐 Dr	opdown Sema » »
≡ Home Leads Contacts My	Jobs Accounts Deals Reportyt Analytics Activiti	es Products SalesInbox •••	Q 2	<u>*</u> + • × * *
Setup Search Q General Users and Control My own Customization Automation Process Management Channels Email Telephony Social Chat SalesSignals Portals Data Administration Marketplace Developer Space	Field Permissions Choose the fields to be displayed for every selected tabs Contacts Deals Products Quotes Seles Standard Contact Image Contact Image Contact Information Lead Source Option 1 Pick List 1 Pick List 2 Pick Li	In the ClientPortal portal user type. Orders Purchase Orders Invoices (I have not saved your changes. you sure you want to move away from this p Yes, Leave Page Stay Here Save and Next F	Cases age?	
Portals Portal URL: https://crm.zof	Portal User Type dis	sabled successfully. ×		Help
PORTAL USER TYPE	NUMBER OF USERS	CREATED BY	LAST MODIFIED BY	STATUS
Client Portal Default	1	Aug 12, 2019	Nov 21, 2019	
red	0	Aug 26, 2019	Nov 06, 2019	
fesgr	0	Nov 06, 2019	Nov 06, 2019	
ā partner	0	Nov 21, 2019	Nov 21, 2019	
retyugi	0	Nov 21, 2019	Nov 21, 2019	
Pain Points: 1. Alert popup 2. For deactiv	is used in different position	s. n before disable the r	portal.	
Solution: Need to	follow the similar style for a	lert/info style		
Conclusion:				

Page Name : Portal - Edit name						
← Client Portal	Save	Cancel				
Module for which Client Portal is created : Contacts						
Pain Points: While editing the name we used different style here.						
Solution: Need to change the style that having tick with green and close icon.						
Conclusion:						

		Send Email Edit
S Ms. Sha	nnon Price	Clone Share
Chennai Chennai	ghjuhiuubui] +	Delete
Contact Owner	Sam Maxwell	Print Preview
Email	balademoeter@yahoo.com	Find and Merge Duplicat
Home Phone	Send Portal Invitation	Meet Now!
Mobile	% 123893	Schedule Online Meeting
Department	_	Send Portal Invitation
Territories	Assian	Run Macro
Territories	<u>A221911</u>	Customize Business Card

Pag	ge Name : P	ortal - Delete Portal			
	Pc	Do you want to delete the	e fesgr portal user type ?	×	⑦ Help
		Yes, pro	oceed		STATUS
		40x 1,	Aug 12, 2015	1404 21, 2015	
	red	0	Aug 26, 2019	Nov 06, 2019	
	fesgr	0	Nov 06, 2019	Nov 06, 2019	
	partner	0	Nov 21, 2019	Nov 21, 2019	
	retyugi	0	Nov 21, 2019	Nov 21, 2019	
Pai	n Points : De	elete popup style is different th	nan other styles.		
Sol	ution: Need	I to follow the similar style for a	alert/delete popup.		
Со	nclusion:				

Page Name : Data Administration - Import			
Drag and drop the files you've exported from Source System here			
- or -			
Browse Files			
Only csv files are supported			
Pain Points: Here the button is the primary action. But it showed in secondary style/			
Solution: Need to follow primary button style for browse file.			
Conclusion:			

Pa	ge Name : Da	ta Administrati	on - Import				
		Vpioad	Module - File Mapping Field Map	ping Review Finish			
	All Modules (40) Ma	apped Modules (0) Unmapped	Modules (40)			QCr	eate New Module
						S	
	Accounts Map files	Accounts X De Map files	Accounts X Sal Map files	Accounts X Us Map files	Attachments Map files	Calls Map files	
Pai	i n Points : Thi	s is not look like a	a button.				
So	lution: Need t	to follow the seco	ndary button st	yle.			
Co	nclusion:						

Chrome File Edit View History Boo	kmarks People Tab	Window Help				c o	🛦 35d 🔽 🖇 🛜 🛚	() 57% [4] Fri 11:23 AM
(3) - Inbox - Zoho M × K Contacts	× 😥 Conta	cts 🗙 😥 2	Zoho CRM - Setup i	🖻 🗙 🛛 🍘 Search Design	s on D × L Lorem lpsum	- All the x Search	icons - 1,160 🗙 🛛 🖸 Kan	gal Neeye - ⊖ 🔲 🗙 📔 🕂
→ C 🌘 crmplus.zoho.com/priti123/inde	x.do/cxapp/crm/org6873	71934/settings/migratio	on/3933324000	003184006?step=modu	leMapping 5	🗧 🖸 💷 72 📥	× / N I 8	0 0 1 0 2 :
ops 🗎 Zoho 🗎 Design Ref 🗎 Imported Fro	om Fir 🔇 Order Flow - E	agl 🦗 Highcharts de	mos UX 10 rule	es for better 🚺 Data 1	ables Desig 📦 Design S	ystems G 👩 Design S	tarter Kit 🛐 Dropdowr	n Sema »
IP Admin Panel CRM								×
ta Migration		Upload M	lodule - File Mapping					
								×
ASSOCIATED FILES	DONE BY	ACTION	MODULE	RECORD NAME	RELATED MODULE	RELATED NAME	ACCOUNT NAME	AUDITED TIME
A R Audit Log cov	Prakash Sekar	ProcessEntry	Deals	Mashaun Terry	Deals	Mashaun Terry		09/02/2019 11:45 AI
Audit Log.csv	Prakash Sekar	ProcessEntry	Deals	Deal 33	Deals	Deal 33		09/02/2019 11:45 Al
UNMAPPED FILES	Prakash Sekar	updated	Deals	Blueprint	Deals	Blueprint	Sheet	09/02/2019 11:45 Al
No files	Prakash Sekar	updated	Deals	Second Potential	Deals	Second Potential	Sheet	09/02/2019 11:45 AI
	Prakash Sekar	updated	Deals	Loreal-	Deals	Loreal-	Sheet	09/02/2019 11:45 Al
	Prakash Sekar	updated	Deals	Loreal-	Deals	Loreal-	Sheet	09/02/2019 11:45 Al
NS	Vignesh G	Mass Restored 4	records					09/02/2019 02:15 P
	Prakash Sekar	ProcessEntry	Deals	Shannon Price	Deals	Shannon Price		09/02/2019 11:45 AI
1	Prakash Sekar	ProcessEntry	Deals	Second Potential	Deals	Second Potential		09/02/2019 11:45 AI
01	Prakash Sekar	updated	Deals	Mashaun Terry	Deals	Mashaun Terry	Sheet	09/02/2019 11:45 Al
	Prakash Sekar	updated	Deals	Loreal-	Deals	Loreal-	Sheet	09/02/2019 11:45 Al
	Prakash Sekar	updated	Deals	Deal 33	Deals	Deal 33	Sheet	09/02/2019 11:45 Al
	Prakash Sekar	updated	Deals	Shannon Price	Deals	Shannon Price	Sheet	09/02/2019 11:45 Al
	Prakash Sekar	updated	Deals	Louise Toothman	Deals	Louise Toothman	Sheet	09/02/2019 11:45 Ai
Save Cancel	Prakash Sekar	updated	Deals	AT	Deals	AT	Sheet	09/02/2019 11:45 AI
card Migration	Post prove the prove (DA)		CUCHARDON.	reactive		rayoth	1.0000000	Next
😤 🚢 Here is your Sr	nart Chat (Ctrl+Space)						Ask Z	ia Zá "S) 🖹 😇
Criannels Contacts		R 📀 🔇	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	P3 🧿 📬 🕝 💎 🚭 (9 🛯 🖈 🖾 🥤			iv w R

Solution: Need to follow the right alignment for the button here. (Right alignment and the position should be right side.

Page Name : Data Adminis	stratio	on - Impor	t					
	Upload	Module - File Mapping	Field Mapping	Review				
Fields Mapping Assign Default Value								
All Fields Mapped Fields (1) Unmapped Fields	(7)						+ Create N	ew Fields
FIELDS IN FILE FIELDS IN ZOH	O CRM						SAMPLE DATA FROM FILE	
Done By Select Field To I	mport	¥				Prakash Sekar	Prakash Sekar	
Action Select Field To I	mport	~				ProcessEntry	ProcessEntry	
Pain Points: There is no pur	pose	of having "·	+" in the	button				
Solution: Need to remove th	າe "+"	button.						
Conclusion:								

Page Name : Data Administration - Import					
Discard Migration Reset Mapping Auto Map					
Pain Points: This is totally a different style for call to actions. And both positive and negative actions are					
laced in the same place.					
Solution: We used box style for primary and secondary buttons. We should change this as a button style instead of link style.					
Conclusion:					

Page Name : Data Administration - Import - alert			
	Current migration will be stopped and you will be redirected to field mapping Cancel OK Data Migration is in progress. We will send an email notification to vignesh.gnanasekarance once it is complete.	zonocorp.com	
Fields Mapping Assign Def All Fields Mapped Fields (1)	Apply Auto Mapping When you apply auto mapping, the remaining unmapped fields will be mapped with the matching fields in the file.		+ Create Nev
Deno By		Drakash Sakar	SAMPLE DATA FROM FILE
Fields Mapping Assign D All Fields Mapped Fields (1)	Discarding this migration will permanently delete the uploaded files and mapping settings. Are you sure you want to proceed? Cancel Discard Migration		+ Create New F
FIELDS IN FILE	FIELDS IN ZOHO CRM		SAMPLE DATA FROM FILE
Done By	Select Field To Import	Prakash Sekar	Prakash Sekar
Fields Mapping Assign Def All Fields Mapped Fields (1)	Cancel Reset		+ Create Ne
FIELDS IN FILE	FIELDS IN ZOHO CRM		SAMPLE DATA FROM FILE
Done By	Select Field To Import	Prakash Sekar	Prakash Sekar
Pain Points: Alert popup style is different and it's totally not readable for the user.			
Conclusion:			
Page Name : Data Administration - Import			

Discard Migration Edit Mapping and re-run Migration.			
Pain Points: Need to follow the button style instead of link. Edit and discard should be in a different place.			
Solution: Edit map button should be on a different place. Discard button should be button style instead of link style.			
Conclusion:			

Page Name : Data Administration - Export	
Export Data 📀 Help	
This page helps you export data as a .CSV file (maximum: 3000 records) from your Zoho CRM account.If you want to export your data to analyze it further or back it up, please use the Request Data Backup option.	
Select Export Module Users +	
Export Cancel	
Pain Points: Button alignment and field alignment is different.	
Solution: Need to follow the right side alignment for the buttons.	
Conclusion:	

Page Name : Data Administration - Backup	
My Jobs Accounts I Stopping Recurring Backup	Q 4 +
Data Back By stopping recurring backup, you will be no longer received Set up to downloor Your subscription	e archivals of backup once in a month.
Backup Sumn	ancel I understand. Stop backup
Backup repeat type Once in a month Current Backup status Scheduled	Stop Backup
Pain Points: Alert popup is different style.	
Solution: Need to follow the similar style for alert/info population	Э.
Conclusion:	

Chrome File Edit View	History Bookmarks People Tab Window Help			G C ⊗ ∆ %	🤶 🖣 26% 🕞 Sun 1:05 PM	Q
 (9) - Inbox - Z X X 	Zoho CRM - R 🗴 😥 Zoho CRM - S 🗴 🛛 🍪 Veerappa Sam	x 🛛 🍘 Pradeep Kuma x 🗍 🗋 Lorem Ip:	uum - x 🕄 Search icons - x	🖸 YouTube 🛛 🗙 🛛 😥 Zoho CRM - H	× Facebook × +	
→ C (crm.zoho.com/crm	n/org687371934/settings/recyclebin		口 女) 🔓 🎭 🎢 🍐 🙏 🗡 🖪 🗀	. 8 0 6 🛛 😫 :	
opps 🗎 Zoho 🗎 Design Ref 🗎	🗎 Imported From Fir 🔇 Order Flow - Eagl 🦙 Highcha	arts demos 👿 10 rules for better M	Data Tables Desig 📦 Design Sj	ystems G 👩 Design Starter Kit 📘	Dropdown Sema »	
Home Leads Contacts M	ly Jobs Accounts Deals Reportyt Analytics	Activities Products SalesInbox		Q 2	🖞 + 🖻 🖾 🛠 🎨	
etup	Recycle Bin				? Help	
	The Recycle Bin displays all the records you have	re access to that have been deleted in	your Zoho CRM account.			
Search Q						
eneral	- After records are deleted, they will be stor	ed in the Recycle Bin for 60 days. Afte	r that, they will be deleted pern	nanently.		
sers and Control	- Only users with an administrator profile ca	n delete records in the Recycle Bin.				
y own Customization	 Non-admin users can restore their own red 	cords from the Recycle Bin. Depending	on their permissions, they may	y also be able to restore other users' r	ecords as well.	
utomation						
ocess Management	Restore Delete				Empty Recycle Bin	
nannels					Displaying 1 to 5 of 5	
					Y	
ata Administration	□ NAME	TYPE	DELETED BY	DELETED TIME -		
ata Administration	NAME Sowers David A Trustee	TYPE	Vignesh G	11/24/2019 01:04 PM		
ata Administration Import	NAME Sowers David A Trustee Summers Alistair & Joyce	TYPE Contacts Contacts	Vignesh G Vignesh G	11/24/2019 01:04 PM 11/24/2019 01:04 PM		l
ata Administration Import Export	NAME Sowers David A Trustee Summers Alistair & Joyce Hammon Robert	TYPE Contacts Contacts Contacts	Vignesh G Vignesh G Vignesh G	DELETED TIME ↓ 11/24/2019 01:04 PM 11/24/2019 01:04 PM 11/24/2019 01:04 PM		
ata Administration Import Export Data Backup	NAME Sowers David A Trustee Summers Alistair & Joyce Hammon Robert Shaw Brady Matthew	TYPE Contacts Contacts Contacts Contacts	Vignesh G Vignesh G Vignesh G Vignesh G Vignesh G	DELETED TIME ↓ 11/24/2019 01:04 PM 11/24/2019 01:04 PM 11/24/2019 01:04 PM 11/24/2019 01:04 PM		
ata Administration Import Export Data Backup Storage	NAME Sowers David A Trustee Summers Alistair & Joyce Hammon Robert Shaw Brady Matthew Portice Judy G	TYPE Contacts Contacts Contacts Contacts Contacts Contacts	Vignesh G Vignesh G Vignesh G Vignesh G Vignesh G Vignesh G	DELETED TIME ↓ 11/24/2019 01:04 PM 11/24/2019 01:04 PM 11/24/2019 01:04 PM 11/24/2019 01:04 PM 11/24/2019 01:04 PM		
ata Administration Import Export Data Backup Storage Recycle Bin	 NAME Sowers David A Trustee Summers Alistair & Joyce Hammon Robert Shaw Brady Matthew Portice Judy G 	TYPE Contacts Contacts Contacts Contacts Contacts	Vignesh G Vignesh G Vignesh G Vignesh G Vignesh G	DELETED TIME ↓ 11/24/2019 01:04 PM 11/24/2019 01:04 PM 11/24/2019 01:04 PM 11/24/2019 01:04 PM 11/24/2019 01:04 PM		
ata Administration Import Export Data Backup Storage Recycle Bin Audit Log	NAME Sowers David A Trustee Summers Alistair & Joyce Hammon Robert Shaw Brady Matthew Portice Judy G	TYPE Contacts Contacts Contacts Contacts Contacts	Vignesh G Vignesh G Vignesh G Vignesh G Vignesh G	DELETED TIME • 11/24/2019 01:04 PM 11/24/2019 01:04 PM 11/24/2019 01:04 PM 11/24/2019 01:04 PM 11/24/2019 01:04 PM		
ata Administration Import Export Data Backup Storage Recycle Bin Audit Log Sandbox	 NAME Sowers David A Trustee Summers Alistair & Joyce Hammon Robert Shaw Brady Matthew Portice Judy G 	TYPE Contacts Contacts Contacts Contacts Contacts	Vignesh G Vignesh G Vignesh G Vignesh G Vignesh G	DELETED TIME - 11/24/2019 01:04 PM 11/24/2019 01:04 PM 11/24/2019 01:04 PM 11/24/2019 01:04 PM		
ata Administration Import Export Data Backup Storage Recycle Bln Audit Log Sandbox arketplace	NAME Sowers David A Trustee Summers Alistair & Joyce Hammon Robert Shaw Brady Matthew Portice Judy G	TYPE Contacts Contacts Contacts Contacts Contacts	Vignesh G Vignesh G Vignesh G Vignesh G Vignesh G	DELETED TIME ↓ 11/24/2019 01:04 PM 11/24/2019 01:04 PM 11/24/2019 01:04 PM 11/24/2019 01:04 PM		
ata Administration Import Export Data Backup Storage Recycle Bln Audit Log Sandbox arketplace aveloper Space	NAME Sowers David A Trustee Summers Alistair & Joyce Hammon Robert Shaw Brady Matthew Portice Judy G	TYPE Contacts Contacts Contacts Contacts Contacts	Vignesh G Vignesh G Vignesh G Vignesh G Vignesh G	DELETED TIME ↓ 11/24/2019 01:04 PM 11/24/2019 01:04 PM 11/24/2019 01:04 PM 11/24/2019 01:04 PM 11/24/2019 01:04 PM		

Pain Points:

- 1. Without select any record there is no need of showing restore and delete button at all the time.
- 2. Positive and negative buttons are used in the same place.

Solution:

1. Restore and delete button should be visible once any record is selected. And both button style should be secondary. Not in a different colors.

Conclusion:

Page Name : Data Administration - Export	
Audit Log	? Help
The audit log provides you with a chronological sequence of actions performed by the users in Zoho CRM.	
	Export Audit Log
Today - Sunday, Nov 24, 2019	
01:08 PM Vignesh G has emptied the Recycle Bin	
01:04 PM Vignesh G deleted 5 Contacts	
12:55 PM Vignesh G exported Leads	
Pain Points: CTA should be in a button style here.	
Solution: Need to follow the primary button style to "Export" the audit logs.	
Conclusion:	

Page Name : Marketplace - Zoho

New	New	Ę
Zoho Webinar (Powered by Zoho Meeting) Schedule and edit webinars, view registrants, and analyze reports all from your CRM. Setup now	Zoho Backstage Stay in sync with all your event from within CRM Setup now	Zoho Meeting With the Zoho Meeting integration, Zoho CRM users can conduct meetings online from
Zoho Projects The Zoho Projects integration allows you to plan, execute, and monitor customer projects from	D D D D D D D D S D D S D D S D S D S D S S D S S S S S S S S S S	Zoho Survey Zoho Survey integration allows you to send surveys and view responses from contacts within
Pain Points: Call to actions are in diffe Solution: CTA should be in primary blu	rent color.	

Page Name : Marketplace - Google	
Contacts Calendar Google Ads Chrome Extension for Gmail	
Zoho CRM for Gmail ⑦ Help A smart Chrome extension that makes adding and viewing contextual information from Gmail to your Zoho CRM quick and easy.	
 Highlights Create new leads and contacts from Gmail. See the complete details of a lead or contact when you open an email. Add tasks, events, and log calls for a customer. Create deals and notes for your leads and contacts. 	
Install Extension Contacts Calendar Google Ads Chrome Extension for Gmail Zoho CRM for Google @ Help Zoho CRM for Google makes it easier for your business to collaborate, communicate and share information with others. @ Help Google Ads Integration With the Google Ads integration, you can now track your Leads and Contacts generated from Google advertisements inside Zoho CRM.	>
 Highlights Access your Google Ads information from Zoho CRM. Use webforms as your Google Ads pages and track your customers in Zoho CRM. Manage your Google Ads spending more effectively and increase your ROI. Automatically export Zoho CRM sales conversion data to Google Ads. 	
Get Started	
Pain Points: Call to actions are in different color.	
Solution: CTA should be in primary blue color.	
Conclusion:	

Page Name : Marketplace - Microsoft
Office 365 Outlook Word
Microsoft Office 365
Events Take your Zoho CRM Calendar to Office 365 and manage Zoho CRM Calendar from Office 365. Enable
Contacts Take your Zoho CRM Contacts to Office 365 and manage Zoho CRM Contacts from Office 365 Enable
Pain Points: For the main action we use primary button in other places. But we used secondary style here.
Solution: CTA should be in primary blue color.
Conclusion:

Page Name : Connection	ns
✓ All Connections ^{⑦ He}	Add Connection +
hghfx ^{hghfx}	
Pain Points: "+" used at t	he last for add connections. What is the purpose of having "+" at last?
Solution: Need to remove	e "+" and the call to action should be Add connections.
Conclusion:	

Page Name : Conr	nections
Search Q	← Create Connection
General Users and Control My own Customization Automation	
Process Management Channels Data Administration Marketplace	Source Connection Details
Developer Space Zia Voice ^{New!} APIs	Connection Name Create and Connect Cancel
Connections	
Pain Points: Visua	lly buttons and components are not aligned.
Solution: Need to a	align properly.
Conclusion:	

Page Name : Marketplace - Microsoft
← Delete Connection
Ponto hghfx → filter hghfx
Are you sure you want to delete this connection ?
Yes, Delete Cancel
Note: Please revoke permission from the third party service
Pain Points: Totally a different style for delete. And there is no confirmation before delete the connection.
Solution:
Conclusion:

ge Name : Functions			
My Functions Gallery			
Attention:Usage Your organization Jan 1, 2020. Down	of deprecated V1 API found is still using the deprecated V1 API in funct aload the file which contains functions to be	ions. Those functions will stop working from migrated to V2 Read More	
Listed below are the functions available for your organization.	These functions can be associated to	the various features only from the respective places	? Help
All Q Search Functions			+ New Function
Name	Category	REST API	
Success Rate of your Accounts Associated This action will determine the success rate of each accou	Button		
n Points: Here we actually creating	a new function but he	ere we have "+ new function"	
ution: CTA should be "Create New	Function"		

e Name : Functions - Gallery			
My Functions Gallery			
Listed below are the functions available in the gallery. You can make use of them by ins	talling it.	Help	
All Q Search Functions			
Name	Places 🕐		
This function helps you create projects in Zoho CRM for every potential you win. Th	Automation		
Roll-up Potential Amount to Accounts Won't it be simpler to view the total revenue generated by all potentials of an accou	Automation		
Closing Tasks of Junk Leads There are many sources for lead generation within Zoho CRM. When you validate th	Automation	Install	
aetTimeSheet InhsframZahaPeonle			

Home Leads Contacts My	γ Jobs Accounts De	Function Det	tails	×	Q 🗸 + 🖲 🛛 💥
Setup	My Functions	You can make us available for you	se of the function for your organization by installing it. Once you install it, it will lunder "My Functions". Later it can be associated to the respective features.	be	
Search Q General Jsers and Control My own Customization Automation Process Management Channels Data Administration Marketplace Developer Space	Listed below are t All Name Zoho People helps Sum Up Potentia If you want to calcu Associate Produ Zoho CRM allows y Saasu_getInvoic Online accounting : Mass update of Automatically update of	Display Name Description Category	Mass update of Child Contacts <u>View Code</u> Automatically update changes in shipping and billing address of a parent account in all the child contacts. Here are the step by step instructions to configure the custom function: 1. Select Accounts as your module. 2. Map the field "AccountId" of Account module to the argument name "accid". 3. Save the configuration. How to make it work? Associate this custom function under appropriate workflow rule to automate the changes to appear in all related contacts when there is a change in shipping and billing address of a parent account. automation	ow	Help
APIs	ZohoRecruit_getJo Zoho Recruit helps you	pOpenings u keep track of job op	enings for respective accounts within Z Related List		
Pain Points: Butt	on colors are	different.			
Solution: We should follow the Primary button (Fill Blue) color.					
Conclusion:					

Page Name : Functions - Create Function				
Leads Contacts My Jobs Accounts	s Deals Create New Fu	unction	×	Q (² + 🖲 🖂
My Function	Gall Function Name			
Q	Display Name			pp working from
d Control	Description v are the fi			y from the respective places ⑦ He
Customization	Category	Select	•	+ New Func
on Management Success This action	Rate of yo will determine the success rate of each	Neccou	ext Cancel	
ninistration				
Pain Points: Button alig	nment is different	t than usual style.		
Solution: Primary butto right alignment.	n should be on th	e right side and the cancel but	tton should	be left side. Both should be
Conclusion:				

Page Name : Function - Write

fdgxc Function Description		Close Save & Execute	Save
Deluge Tasks	void sfdg() Edit Arguments		⑦ Help
BASIC set variable add comment info CONDITION if	<pre>1 /// 2 else if (<variable> <opr> <expression>) 3 ~ { 4 } 5 <variable> = invokeurl 6 ~ [7 url: <expression> 8 type: <expression> 9 parameters: <expression> 10 heeders: <expression> 11]:</expression></expression></expression></expression></variable></expression></opr></variable></pre>		
ain Poir	nts: Two primary button placed in the sam	place. when I create something and click the save	buttor

it shows some error in the code. Same happens for save&Execute. We don't have draft option here, If something error I may not able to save this function. So it's unnecessary duplicate buttons placed here.

Solution: Primary button should be Save/Save&Execute. There is no need of both button here. Only one primary action is enough for this place.

Conclusion:

Page Name : Function - Alert			
BASIC set variable acd comment Info local Info consumant if else if else if else if else if else if send mail INTERGATIONS webhook	Failed to save the function Syntax error. Expecting statement. Found '<. Line Number: 1		
Leads Contacts My Jobs Accounts Deal My Functions My Functions Delete Function - vghj Deleting the function will permanently delete it from your organization's repository and can't be recovered. Are you sure you want to delete it? Yes, Delete Function Cancel	Q \swarrow^5 + in working from		
Control			
Pain Points: Popup style and positions are different than usual style. Two types of po	pup style used here.		
Solution: Alert/popup/info should be same style in all the places.			
Conclusion:			

Page Name : Widgets		
Widgets Widgets are simple embeddable UI components that can be written using your own JS Framework to perform the custom a with your application data by providing a single sign-on between Zoho CRM and any third-party applications.	actions. It can ensure a seamless inte	🤊 Help
All Types 👻 🛛 All 👻		+ Create New Widget
Name	Widget Type	
sdfsdf Installed	Settings	
bb ghvgv Installed	Related List	
Pain Points: "+" is added before "Create".		
Solution: Need to remove "+" and the CTA should be "Create New Widg	et"	
Conclusion:		

Page Name : Widgets - popup				
Contacts My Jobs Accounts Deals Rep	Are you sure you want to delete this widget?	Q (19) +		
Widgets	Cancel Yes, Delete Now			
Q Widgets are simple embeddated with your application data by pro	viding a single sign-on between Zoho CRM and any third-party applications.	tom actions. It can ensure a seamless integration		
All Types 👻 🛛 All 👻		+ c		
Pain Points: Popup style is differ	rent than usual style.			
Solution: Alert/popup/info should	d be same style in all the places.			
Conclusion:				

ge Name :	Variables			
CRM Variat CRM variables are merge fields in em	DIES pseudo-module field ail templates, or as re	s that are used to store static and reusab usable authentication parameters in fund	le information in your Zoho CRM account. They ttions and APIs.	 Help can have a unique set of values and can be used as
All Variables 👻	Q Search Variabl	es, API Name, Data Type		+ Create New Variable
VARIABLE	NAME	DATA TYPE	VALUE	GROUP NAME
asdfgg		Single Line	df	asdsfgxc
dsfdgh		Date/Time	11/30/2019 11:40 AM	bigil
hjknl		Number		General
sdfsdf		Single Line	dfg	General
n Points: " ution: Nee	+" is added ed to remov	before "Create". e "+" and the CTA shou	Ild be "Create New Variable	es"
nclusion:				

Page Name : Variables - Create new				
Create CR	M Variable			
Variable Name	Variable Name			
Description				
Variable Type	Select			
Grouped Under	asdsfgxc			
Save Cancel				
Pain Points : Button alignment is different. Here we create the new variable so the CTA should be Create instead of save.				
Solution: Need to remove "+" and the CTA should be "Create New Variables"				
Conclusion:	Conclusion:			

Page Name : Variables - Delete				
Leads Contacts My Jobs Accour	Are you sure you want to delete this CRM variable asdfgg ?	Q 🗳 + 🗊		
C RIVI V CRM variat merge field	ariables Delete Cancel bles are pseudo-1 Is in email templates, or as reusable authentication parameters in functions and APIs.	nt. They can have a unique set of values and can be		
Pain Points: Delete popup is different style.				
Solution: Need to remove "+" and the CTA should be "Create New Variables"				
Conclusion:				

Pag	Page Name : Webform					
	Webforms Auto-Response Rules	Unsubscribe Form				
	Webforms Seamlessly push data from your custom Module : Leads -	webforms into your CRM system. Make your webforms c	compatible with Google sites, I	Facebook, Joomla, Word	Press, and more! + Create Web Form	•
	FORM NAME	CREATED BY	STATUS	LAYOUT NAME		
	Sample Test	Vignesh G 26 Aug, 2019		Standard	Embed options	
Pai	n Points: Here the fund	ctionality is creating a new webfo	orm. So "+" not n	eeded here.		
Sol	ution: CTA should be	"Create New Webform"				
Со	nclusion:					

Page Name : Webform - delete			
Leads Contacts My Jobs Acco Webfor Webf Seamlest	Are you sure you want to delete Sample Test? Zoho CRM will no longer accept any data submitted through this form. Delete Cancel oomla, WordPress, and more!		
Sustomization Module : Leads +	+ Create Web Form		
Contacts My Jobs Accounts Deals F Webforms Auto-Resp	Are you sure?		
Auto-Response Auto-response rules allow	Rules bu to specify criteria that select the required email templates to be sent when a record is generated through webforms.		
Pain Points: Popup style and	positions are different than usual style. Two types of popup style used here.		
Solution: Alert/popup/info sh	uld be same style in all the places.		
Conclusion:			

Page Name : Webform - auto response rules				
Webforms Auto-Response Rules Unsubscribe Form				
Auto-Response Rules Auto-response rules allow you to specify criteria that select the required email templates to You can only have one active Auto-response rule for a module.	o be sent when a	record is generated through we	oforms.	?) Help
Module : Leads 👻			Crea	te Rule
RULE NAME	STATUS	CREATED BY	CREATED ON	
hgvjkl		Vignesh G	11/27/2019	
mn,,		Vignesh G	11/27/2019	
Webforms Auto-Response Rules Unsubscribe Form				
Create Auto-Response Rule for Web-to-Lead				? Help
Rule Name				
Make this auto-response rule active for this Web-to-Lead. \Box				
Save				
Rule Information				
Rule Name hgvjkl	Ø			
Created By Vignesh G on 11/27/2019				
Active				
Rule Entries: Create Rule Entry				
ORDER CRITERIA	EMAIL TEMPLATE			
Edit + Delete 1 Address field is gfhjk		Sfdgh	n	
Pain Points : When I create new rule it asking name or Again I have to click the rule and give the rule entry.	nly. Once I	save the name it	come back to list pa	ige.
Solution: Need to rework the feature.				
Conclusion:				

Page Name : Webform - auto response rules	5		
Webforms Auto-Response Rules Unsubscribe Form			
Auto-Response Rules Auto-response rules allow you to specify criteria that select the required ema You can only have one active Auto-response rule for a module.	il templates to be sent when a r	ecord is generated through w	Help vebforms.
Module : Leads 👻			Create Rule
RULE NAME	STATUS	CREATED BY	CREATED ON
hgvjkl		Vignesh G	11/27/2019
mn,,		Vignesh G	11/27/2019
Pain Points : When I create new rule it asking r Again I have to click the rule and give the rule e	name only. Once I entry.	save the name i	t come back to list page.
Solution: Need to rework the feature.			
Conclusion:			