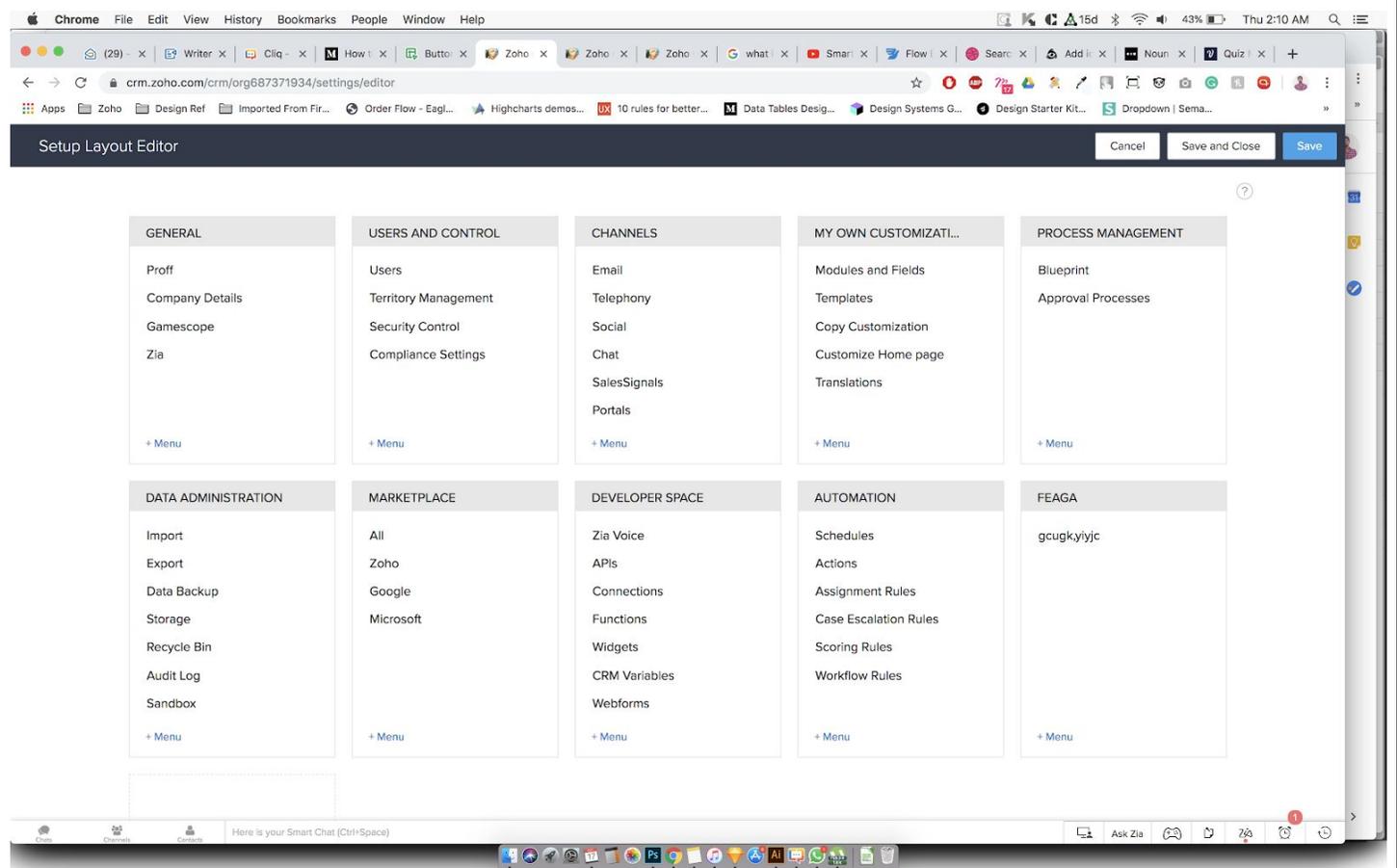


Design Validation Report for Buttons

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

Metadata	Metadata Input
Research Tagline	Design Validation for buttons
Activity Purpose	<p>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</p> <ol style="list-style-type: none"> 1. “+” Playing the major role in add/create buttons and some other places too. 2. Button literals are different from the action (Not conveyed the same meaning as what action does) 3. There is no different from the primary and secondary buttons in some places. 4. Misaligned buttons. 5. Lot of duplicates & similar styles in the buttons.
Platform	Zoho CRM Web
Key Performance Metrics	<p>Validate the buttons are actually able to convey the action message to the user or not.</p> <p>Validate the buttons connection between the action and the functionality is the same.</p> <p>Validate the buttons that user can able to identify the action buttons in the page/popup/dropdown/conditions etc.,.</p> <p>Validate the button styles based on the priority, and keep them all focused depends on the priority.</p> <p>The study will also provide us with:</p> <p>Metrics: Objective and behavioral performance data that provides a usability baseline to measure improvements.</p> <p>Audience insights: Actionable insights on how to optimize the user experience for our users.</p> <p>Actionable improvements: Concrete recommendations for improvements based on research findings.</p>
Research Requested by	Dayanithi (CRM Visual Leadership staff)
Report Compiled by	Vignesh Gnanasekaran
Report Compiled date	November 25, 2019

Page Name : Customize setup



Pain Points:

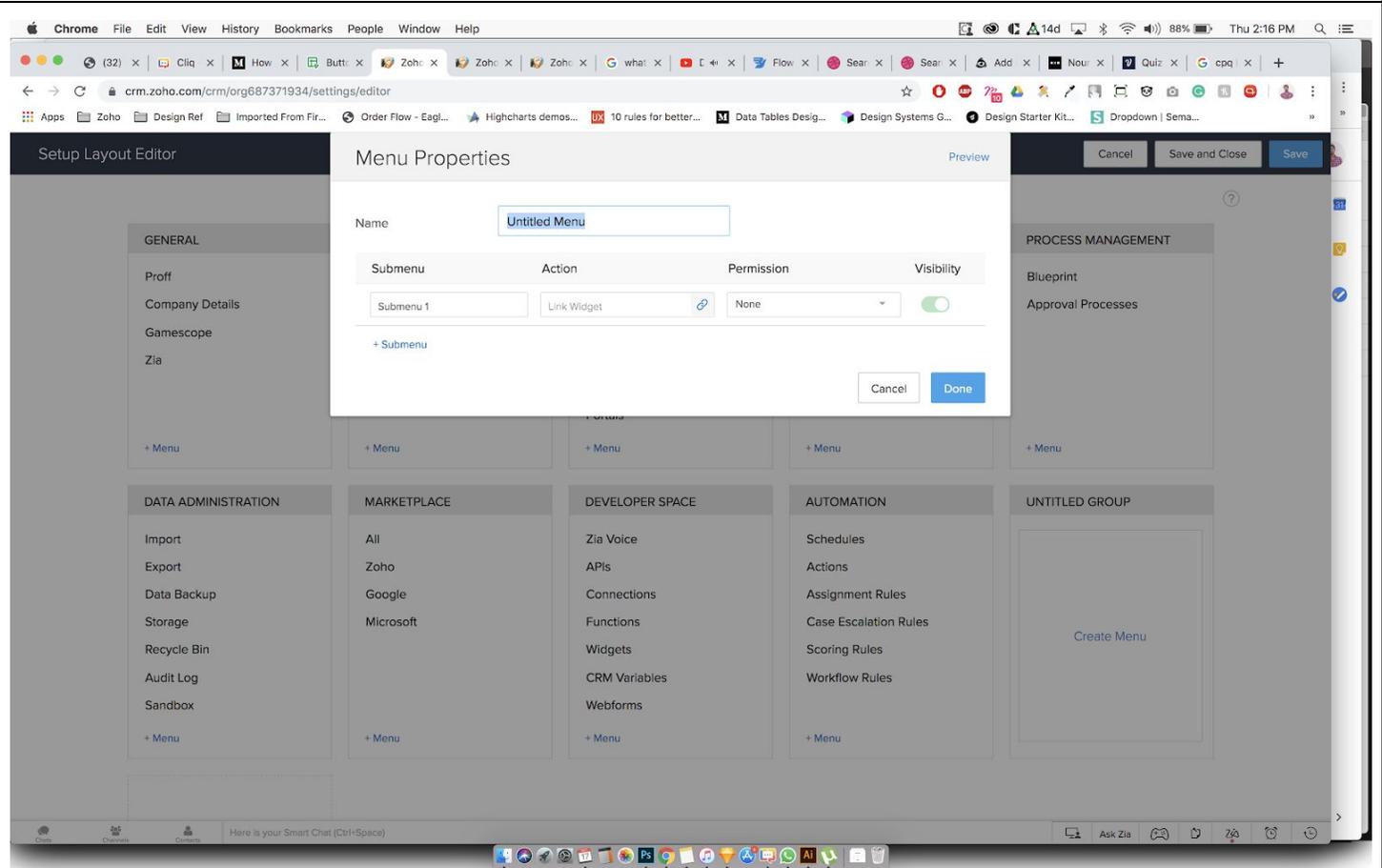
1. +Menu is repeated in all the menus (One action repeated in all the places)
2. Save and Close placed next to save.
3. Different header is used here.

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.

Conclusion:

Page Name : Add New Menu



Pain Points:

1. As a user when I click the add new button the title shows the different title and the call to action is not similar to the action.

Solution: As a user when I click the add menu button in the setup page I can able to see the title as "Add New Menu" Instead of Menu properties. And the call to action should be Add Menu. So that It gives more meaningful to this popup.

Conclusion:

Page Name : My account

The screenshot displays the Zoho CRM 'My account' settings page. The user profile is for Vignesh G, Administrator, CEO at Don Bosco, with email vignesh.gnanasekaran@zohocorp.com. The 'Social Profiles' section includes a field for Twitter with a '+ Add' button. The 'Locale Information' section lists settings: Language (English (United States)), Country Locale (United States), Time Format (12 Hours), Time Zone (India Standard Time), Shift Hour (- None -), and Preferred Currency (Albanian Lek - ALL). The left sidebar shows navigation options like Setup, General, Company Details, etc.

Pain Points:

1. "+ Add" used here to add new twitter account. (+ conveys the message of add and we use the Add text next to the icon)

Solution:

1. We need to use "Add Account" as action here.

Conclusion:

Page Name : Business Hours

The screenshot shows the Zoho CRM interface for the 'Business Hours' settings page. The browser is Chrome, and the URL is 'crm.zoho.com/crm/org687371934/settings/business-hours'. The page has a dark navigation bar with options like Home, Leads, Contacts, My Jobs, Accounts, Deals, Activities, Reportyt, Analytics, Products, and Quotes. A left sidebar contains a 'Setup' menu with categories like General, Users and Control, Channels, My own Customization, Process Management, Data Administration, Marketplace, Developer Space, Automation, and feaga. The main content area is titled 'Business Hours' and includes a 'Help' icon. Below the title is a descriptive paragraph: 'Business hours define the operational hours of your organization. Set business hours to help your employees ensure that the activities are carried out at the operational hours of your organization.' There are three settings rows: 'Week starts on' set to 'Monday', 'Business Days' set to 'Monday - Friday', and 'Business Hours' set to '24 Hours'. A 'Closed' row is set to 'Saturday, Sunday'. Below this is a 'Shift Hours' section with a 'Help' icon and a blue 'New Shift Hours' button. The bottom of the page shows a taskbar with various application icons and a system tray with a clock showing 'Thu 3:02 PM'.

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:

Page Name : Business Hours

Page Name : Business Hours

Chrome File Edit View History Bookmarks People Window Help

crm.zoho.com/crm/org687371934/settings/business-hours/createShiftHours

Home Leads Contacts My Jobs Accounts Deals Activities Reportyt Analytics Products Quotes

Setup

Search

General

Proff

Company Details

Gamescope

Zia

Users and Control

Channels

My own Customization

Process Management

Data Administration

Marketplace

Developer Space

Automation

feaga

Company Details Fiscal Year Business Hours Holidays Currencies Hierarchy Preference

Create Shift Hours

Shift Name

Time Zone

Shift Hours Same hours every day 09:00 AM to 05:00 PM
 Different hours every day

Shift Days Monday
 Tuesday
 Wednesday
 Thursday
 Friday

Break Hours

Assign To

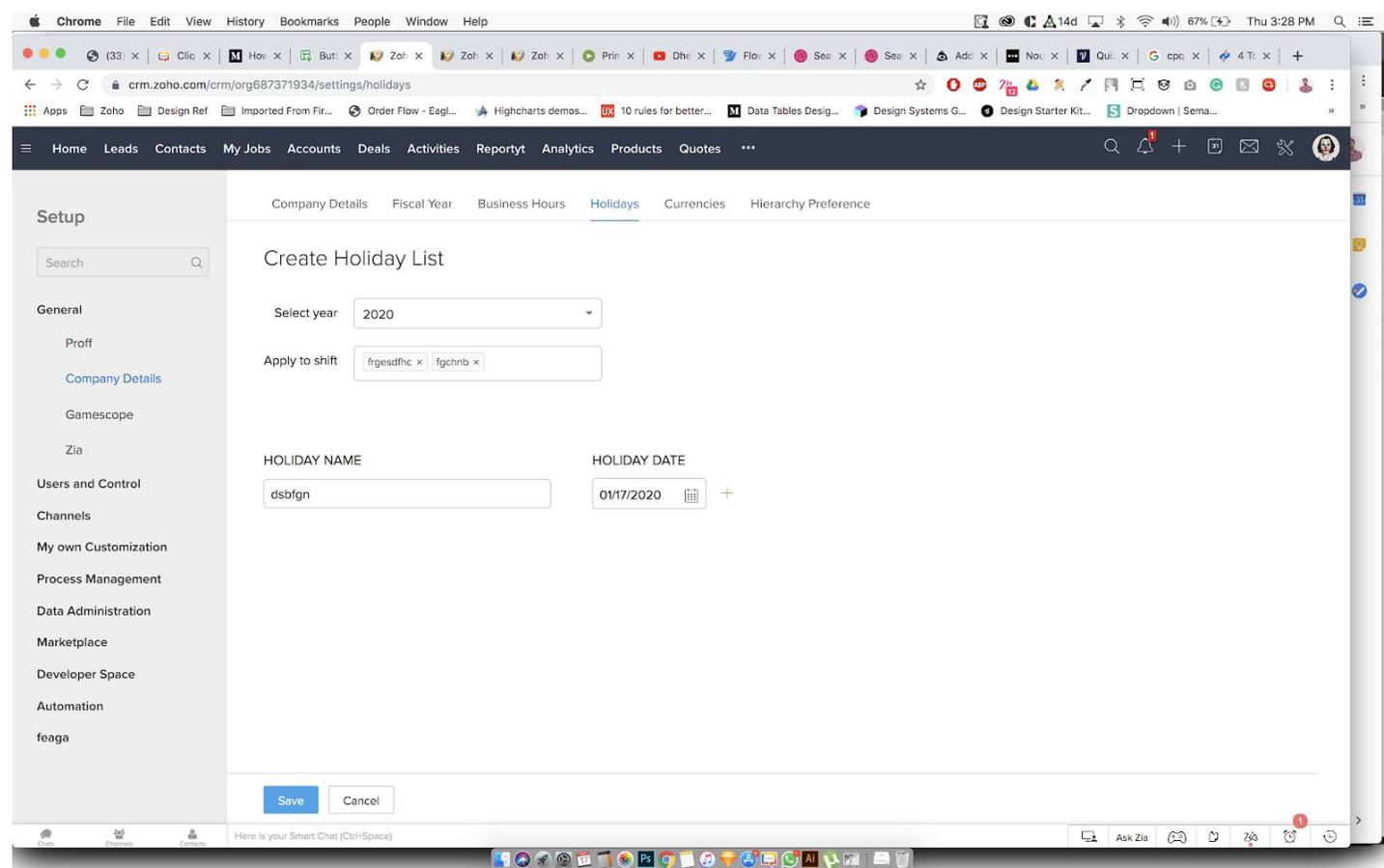
Pain Points:

1. Here the Title clearly shows; create shift hours. But why do we show the save button at the bottom instead of create?

Solution: Need to change the save button as Create shift hours/Create.

Conclusion:

Page Name : Holidays



Pain Points:

1. Here the Title clearly shows: create holiday list. But why do we show the save button at the bottom instead of create?

Solution: Need to change the save button as Create Holiday/Create.

Conclusion:

Page Name : Currencies

The screenshot displays the Zoho CRM interface for the 'Currencies' settings page. The browser address bar shows the URL: `crm.zoho.com/crm/org687371934/settings/currencies`. The page header includes navigation tabs: Home, Leads, Contacts, My Jobs, Accounts, Deals, Activities, Reportyt, Analytics, Products, Quotes, and a search icon. The left sidebar contains a 'Setup' menu with options like General, Proff, Company Details, Gamescope, Zia, Users and Control, Channels, My own Customization, Process Management, Data Administration, Marketplace, Developer Space, Automation, and feaga. The main content area is titled 'Currencies' and shows the 'Home Currency' as 'Albanian Lek - ALL' with a format of 'ALL 1 234 567.89'. Below this is a table of currencies:

NAME	SYMBOL	EXCHANGE RATE	LAST MODIFIED BY
Singapore Dollar - SGD	S\$	55	Prakash Sekar on 10/11/2019 05:06 PM
✓ Angolan Kwanza - AOA	Kz	500	Prakash Sekar on 10/11/2019 05:06 PM
✓ Indian Rupee - INR	₹	12	Vignesh G on 10/17/2019 02:56 PM
✓ Argentine Peso - ARS	AR\$	5678	Vignesh G on 10/17/2019 03:00 PM

An 'Add' button is located in the top right corner of the table area. A note at the bottom right of the table states: 'Only 10 currencies will be active.'

Pain Points: "Add" Button not convey the action message.

Solution: Add Currency is relevant action to this page.

Conclusion:

Page Name : Add Currency

The screenshot displays the Zoho CRM interface with the 'Add Currency' dialog box open. The dialog contains the following fields:

- Currency: Afghan Afghani - AFN
- Format: Af 1,234,567 (with a 'Customize' link)
- Exchange Rate: 1 ALL = 23

Buttons in the dialog include 'Cancel' and 'Save'. In the background, a table lists existing currencies:

NAME	Symbol	Rate	Last Modified By
Singapore Dollar - SGD	S\$	55	Prakash Sekar on 10/11/2019 05:06 PM
✓ Angolan Kwanza - AOA	Kz	500	Prakash Sekar on 10/11/2019 05:06 PM
✓ Indian Rupee - INR	₹	12	Vignesh G on 10/17/2019 02:56 PM
✓ Argentine Peso - ARS	AR\$	5678	Vignesh G on 10/17/2019 03:00 PM

Additional background elements include a sidebar menu with 'Setup' and 'Currencies' sections, and a footer with system icons and a chat window.

Pain Points: Here the functionality is add currency details. But the button show save this action.

Solution: Need to change the save button as add currency/Add.

Conclusion:

Page Name : Gamescope

Gamescope ON

How do trophies work?
The top scorer of the challenge in a game wins the trophy.

How do badges work?
Badges are awarded to everyone who reaches the target.

TROPHIES **BADGES** + Add New

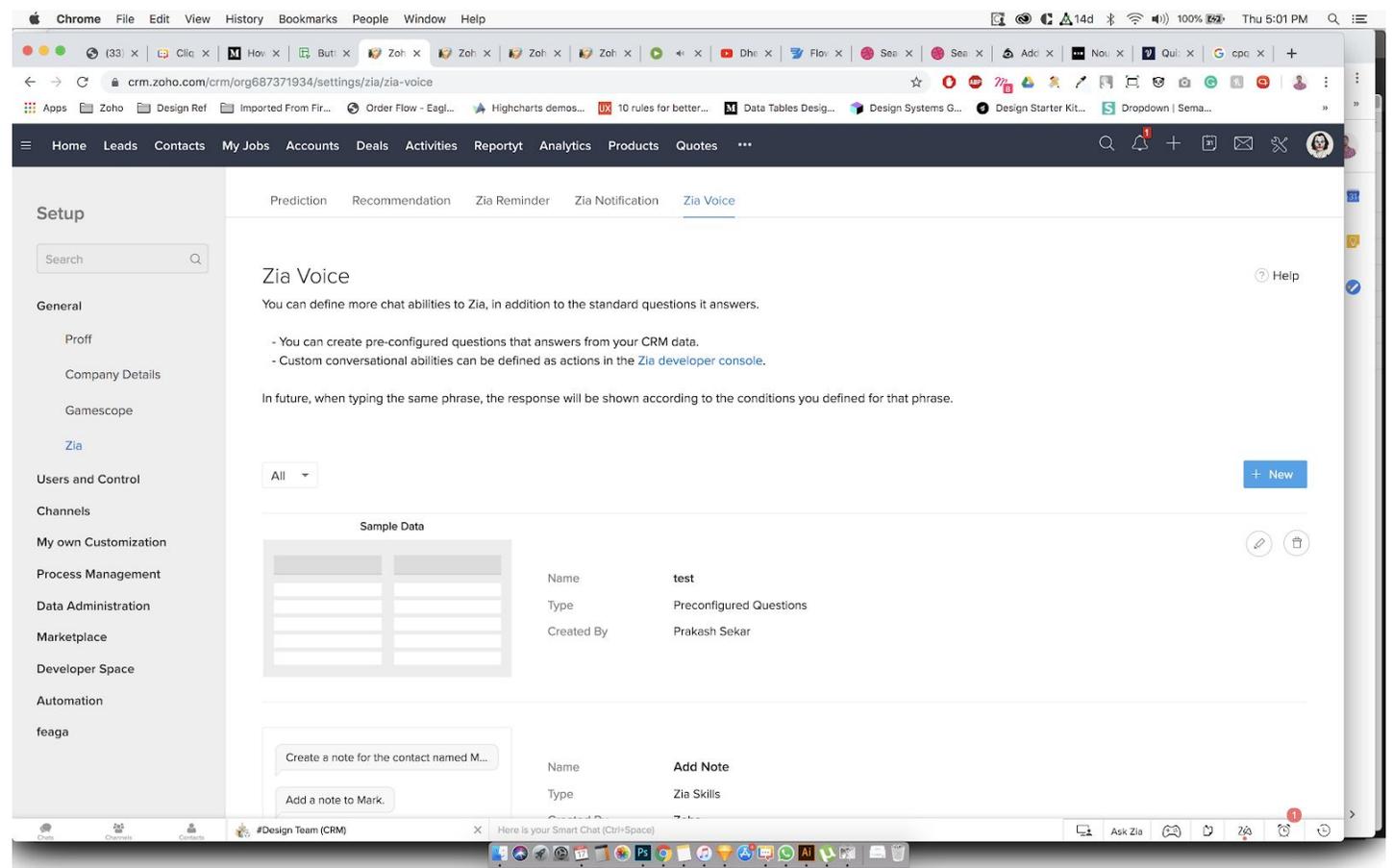
TROPHY	CHALLENGE	ACTION	MODULE	CRITERIA
Lead Speedster	Leads converted	Convert	Leads	Within 1 Month(s) 10 Points <input type="checkbox"/>
Task Timeliness	Tasks completed	Complete	Tasks	On time 987 Points Overdue -5 Points <input checked="" type="checkbox"/>
Deal Timeliness	Potentials won	Closed Won	Deals	On time 10 Points Overdue -5 Points <input checked="" type="checkbox"/>
Master Mailer	Emails sent	Send	Emails	5 Points <input type="checkbox"/>

Pain Points: + Add New button in trophies & badges.

Solution: Action buttons should be Create new trophy & Create new Badges.

Conclusion:

Page Name : Zia Voice



Pain Points: A simple "+New" button not convey the exact action.

Solution: Need to change the +New button as Pre configure questions.

Conclusion:

Page Name : Users

The screenshot displays the Zoho CRM 'Users' management interface. On the left, a 'Setup' sidebar lists various configuration options. The main content area is titled 'Users' and shows a list of 'Active Users (3)'. The user profile for 'Vignesh G' is selected and expanded, showing his role as 'CEO at Don Bosco' and his email address. Below the profile, there are sections for 'Social Profiles' (with a '+ Add' button for Twitter) and 'Reporting Hierarchy' (with fields for Reporting Manager and Subordinates). The 'Locale Information' section shows the user's language as 'English (United States)' and country locale as 'United States'.

Pain Points:

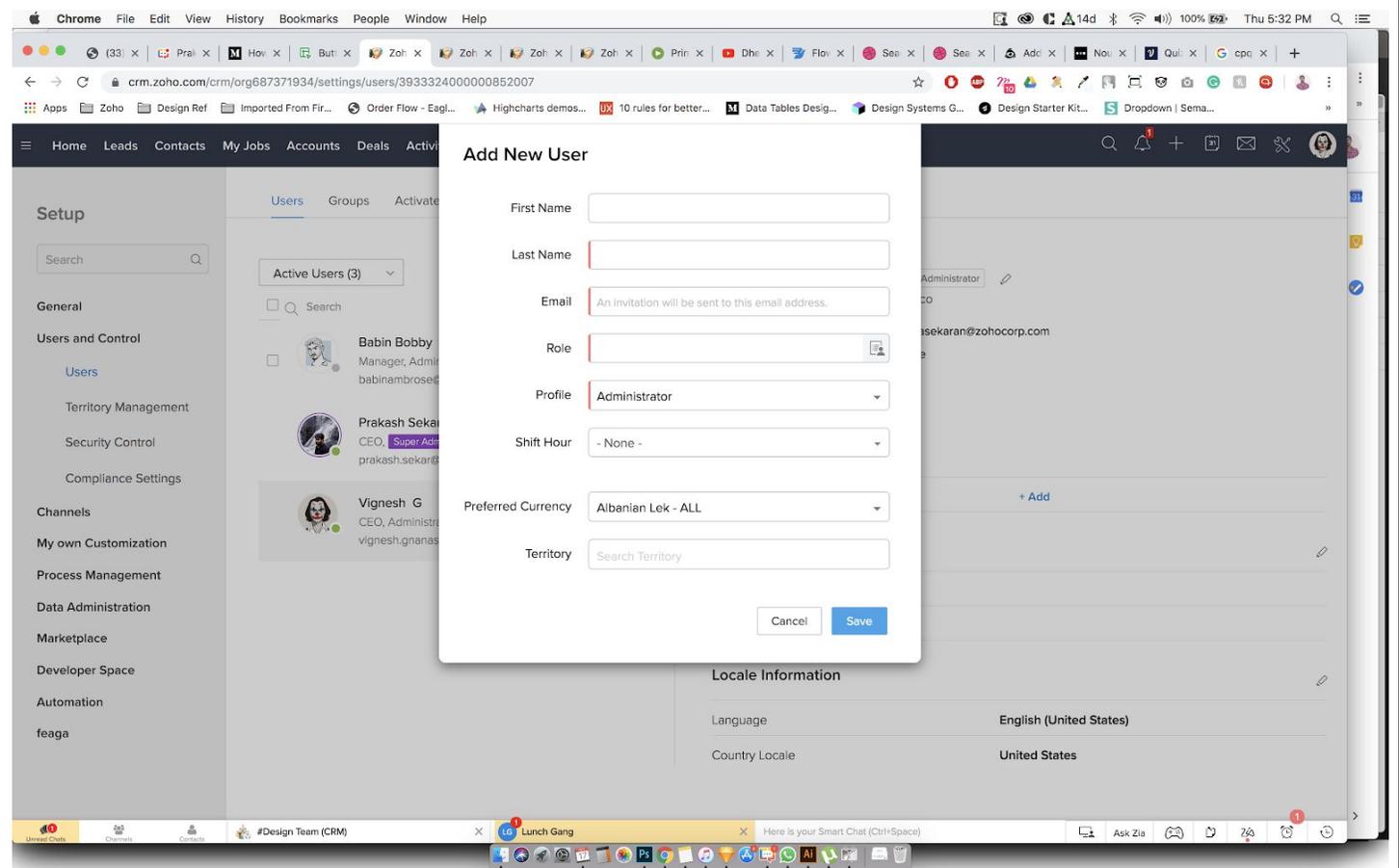
1. +New user - Here the actual functionality is inviting the new user.
2. +Add action in twitter.

Solution:

1. As a user I'm actually inviting a new user to the zoho CRM. So here action button should be Invite User/Invite Team.
2. +Add button should be add account

Conclusion:

Page Name : Add New User



Pain Points: The functionality is Inviting the new user. But it shows add the new user.

Solution: Need to change the title as Invite new user and the action button should be Invite instead of save.

Conclusion:

Page Name : groups

[Users](#) [Groups](#) [Activate Users](#)

Groups

[? Help](#)

This page lists all public groups created for your organization.

[New Group](#)

GROUP NAME

GROUP DESCRIPTION

[erghr](#)

[febrgn](#)

[fdgf](#)

[ergtdhrfyghk](#)

Setup

Search

General

Users and Control

[Users](#)

[Territory Management](#)

[Security Control](#)

[Compliance Settings](#)

Channels

My own Customization

Process Management

Data Administration

Marketplace

Developer Space

Automation

[feaga](#)

[Users](#) [Groups](#) [Activate Users](#)

New Group

Group Name

Group Description

Group Sources

Select Group Source Type

Available

Babin Bobby
Prakash Sekar
Vignesh G

Selected

None

[Save](#)

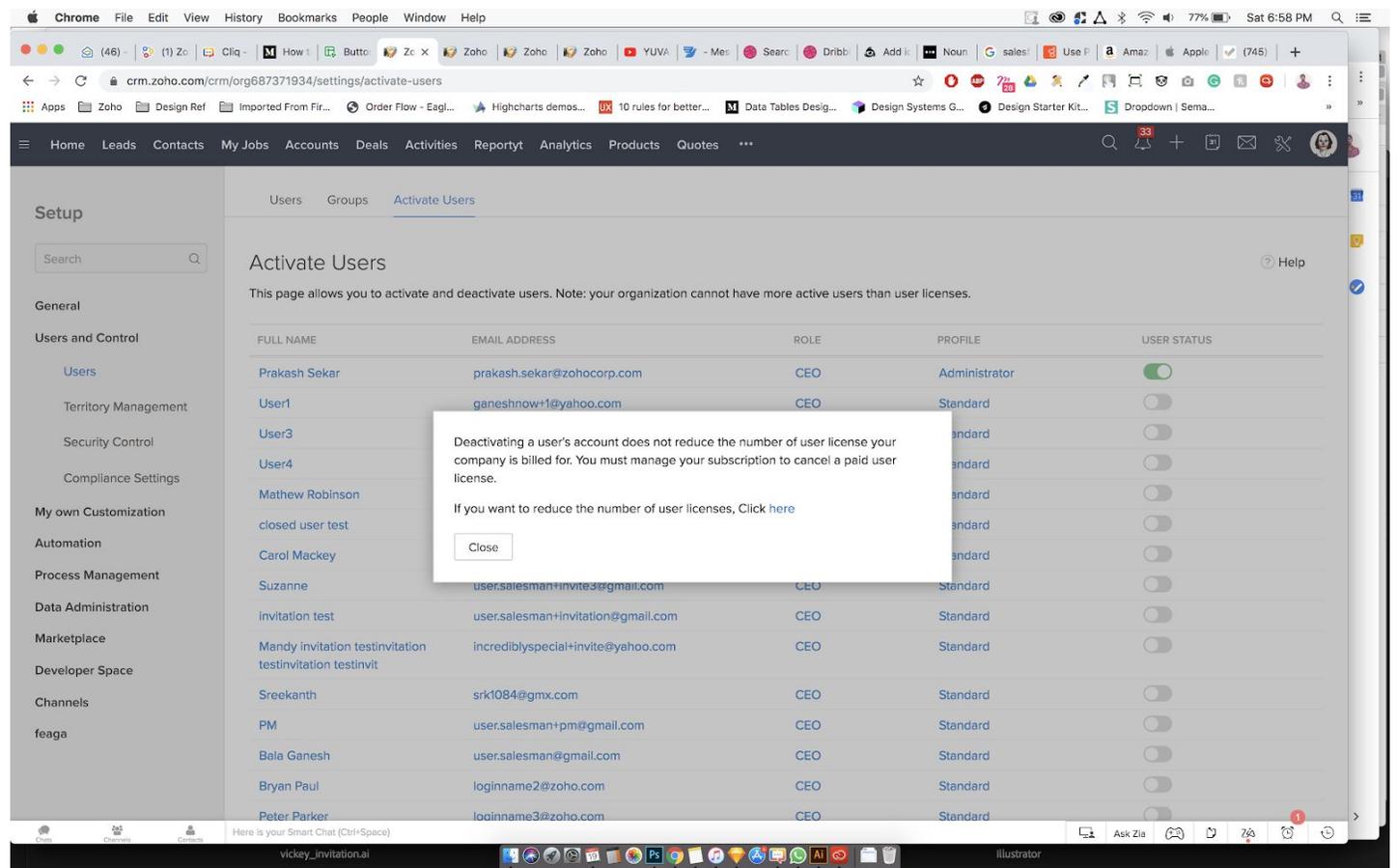
[Cancel](#)

Pain Points: As a user I'm create the new group. But what is the purpose of having a "New group" alone? What are we doing here, creating? Or adding? delete?

Solution: Need to change the call to action as "Create New Group". When user click the Create new group the detail page should explain the same message. So the title should be "Create New Group" and the call to action should be Create/Create Group.

Conclusion:

Page Name : Deactivate Users

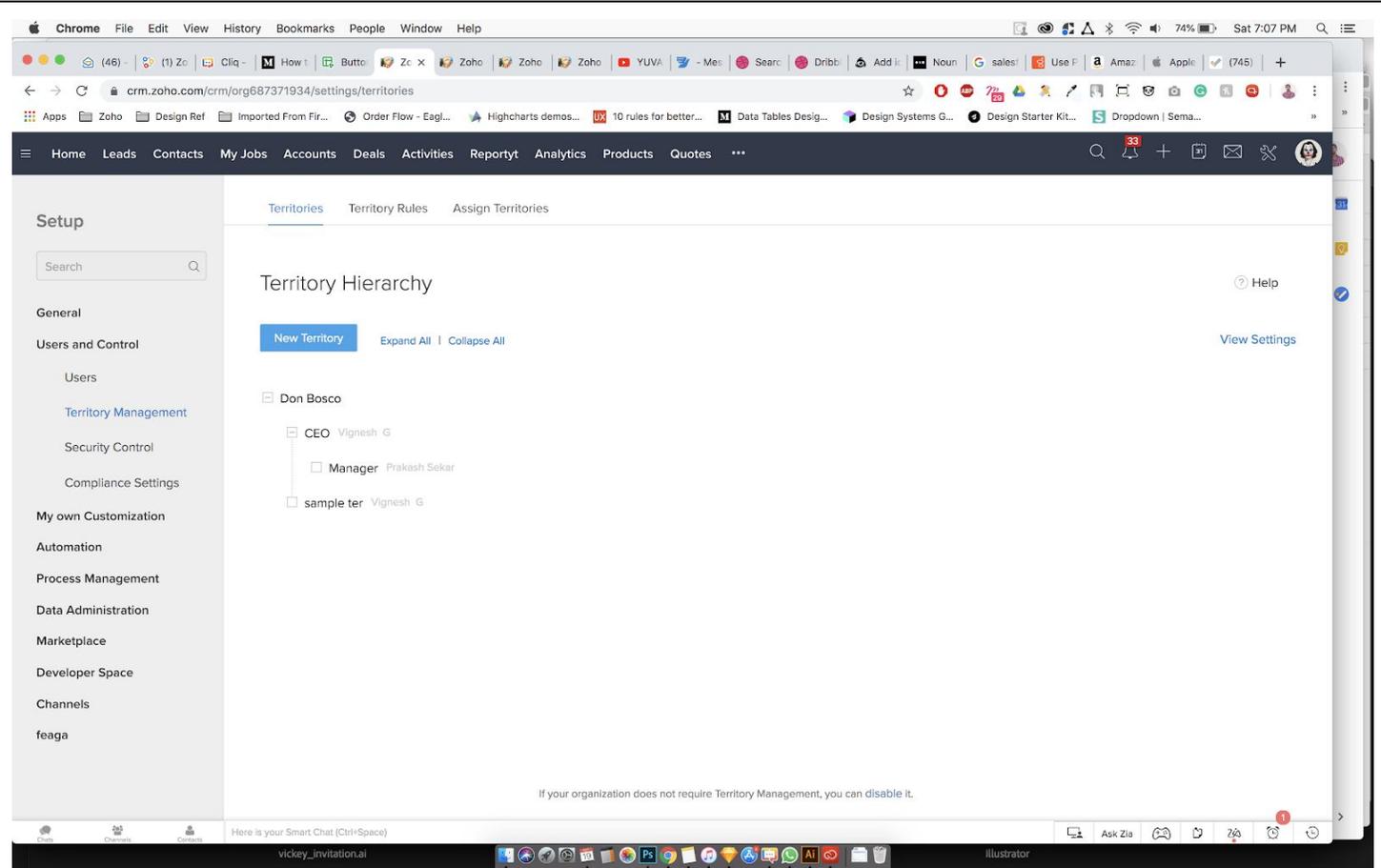


Pain Points: When I click the user status its activated. And when I turn off the active mode the popup comes. This is one of the important messages but it's not look like important or it's not readable. First time I skip this like an info next time only I ready the information clearly.

Solution: Need to change the popup style and the buttons.

Conclusion:

Page Name : Territory Management



Pain Points:

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.

Conclusion:

Page Name : Territory settings

[Territories](#) [Territory Rules](#) [Assign Territories](#)

Territory Hierarchy

[? Help](#)

New Territory

[Expand All](#) | [Collapse All](#)

[View Settings](#)

Don Bosco

CEO Vignesh G

Manager Prakash Sekar

sample ter Vignesh G

Territory Settings

Territory Structure From Role Hierarchy

Created By Prakash Sekar
Apr 11, 2019 12:03 PM

Deal Territory Rule Disabled [Enable](#)

[Territories](#) [Territory Rules](#) [Assign Territories](#)

Territory Hierarchy

[? Help](#)

New Territory

[Expand All](#) | [Collapse All](#)

[View Settings](#)

Don Bosco

CEO Vignesh G

Manager Prakash Sekar

sample ter Vignesh G

Re-Enable Deal Territory Rule

All your Deal will be re-assigned with territories based on the Deals territory rules already configured.

[I Understand, Enable Now.](#)

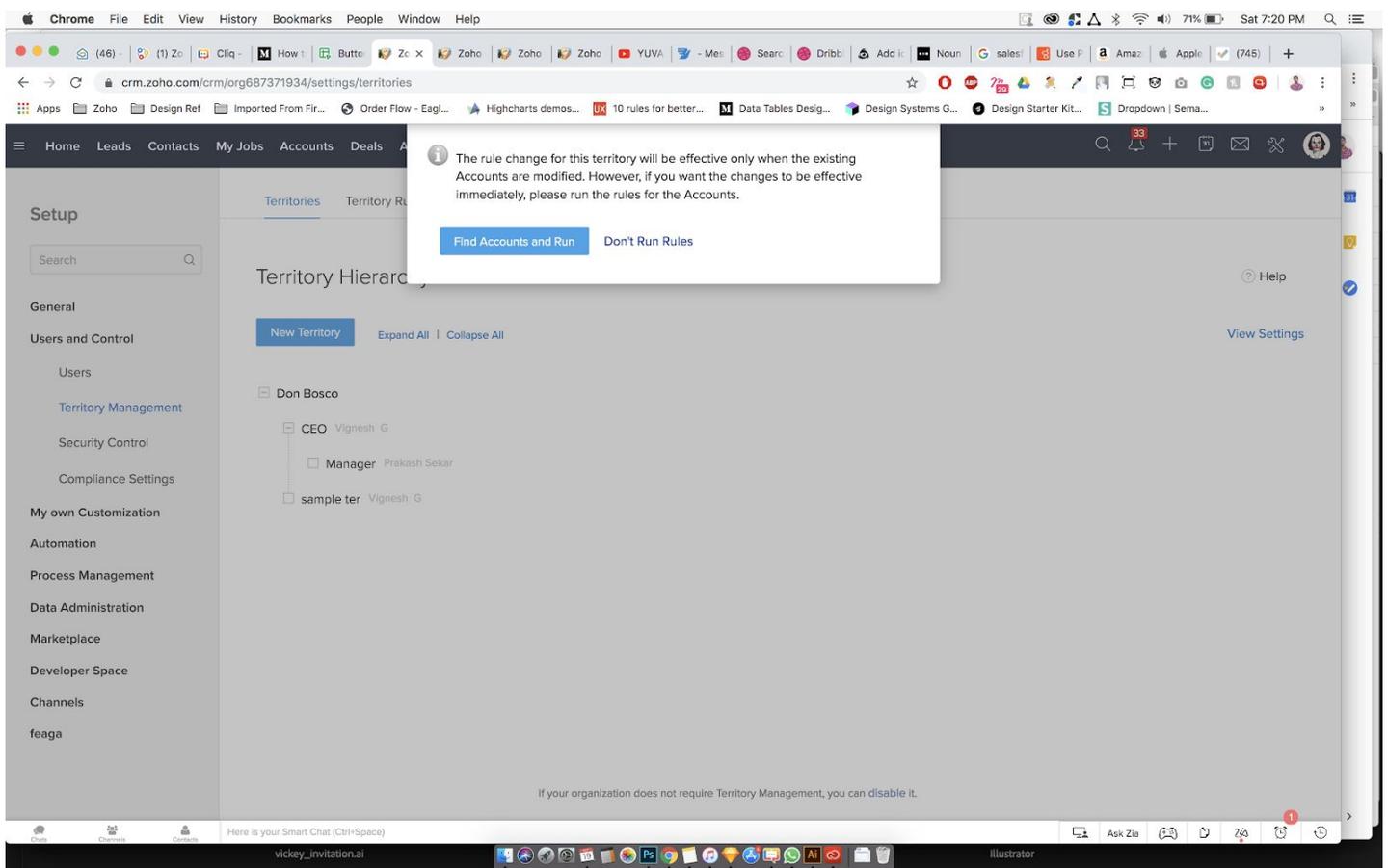
[Cancel](#)

Pain Points: Unexpected popup behavior. As a user I can see all the popup at the top but suddenly this action comes in the same place.

Solution: All popup should be placed on the top and should follow the popup/alert/info style.

Conclusion:

Page Name : Edit territory with adding new rule

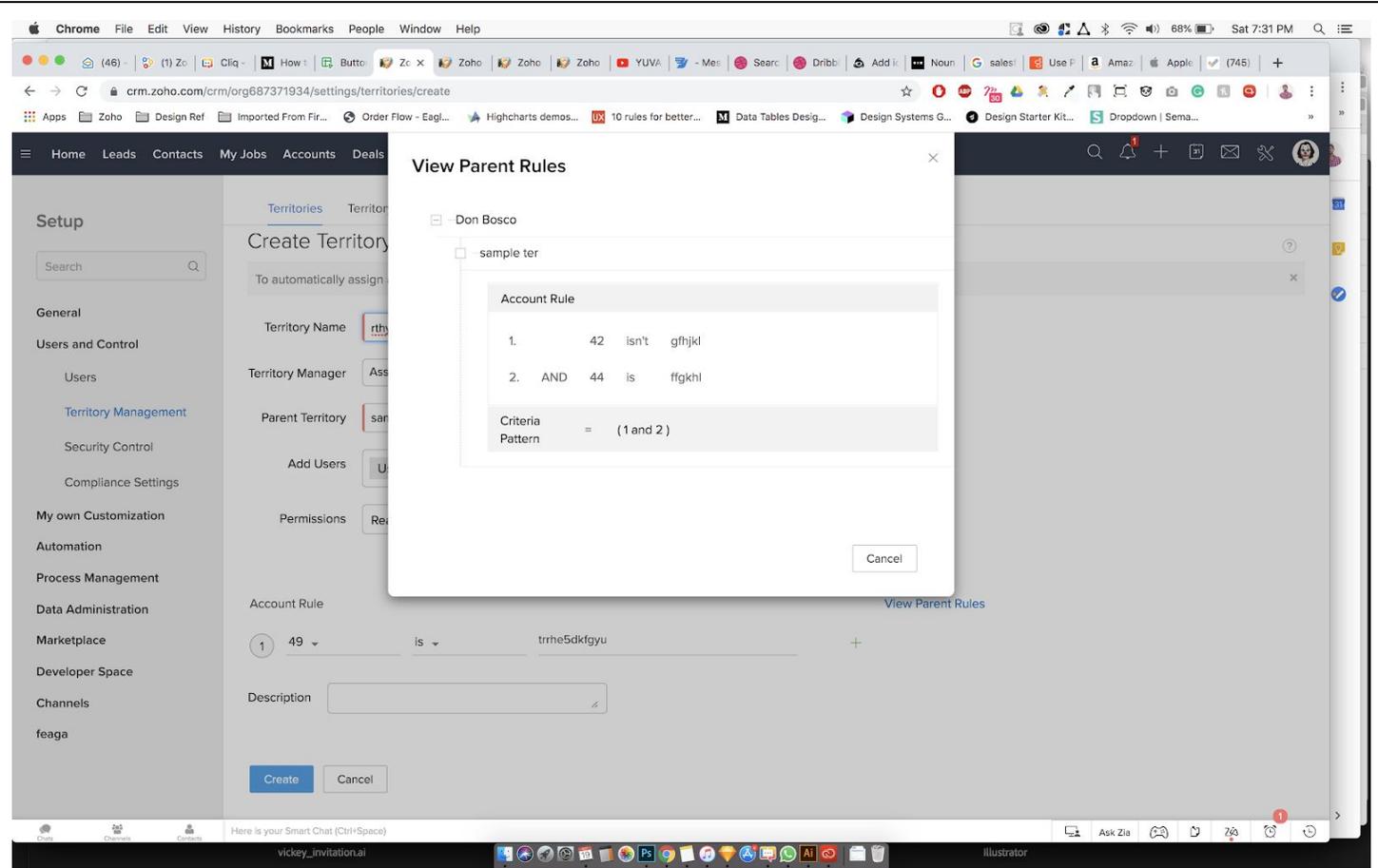


Pain Points: When I give a criteria to the existing user i can see this popup. The content on this popup is not readable. Only i can see at first sight is to “find account and run”. And secondary button looks different style than usual.

Solution: All information or alert should follow the popup/alert/info style.

Conclusion:

Page Name : View Parent Territory

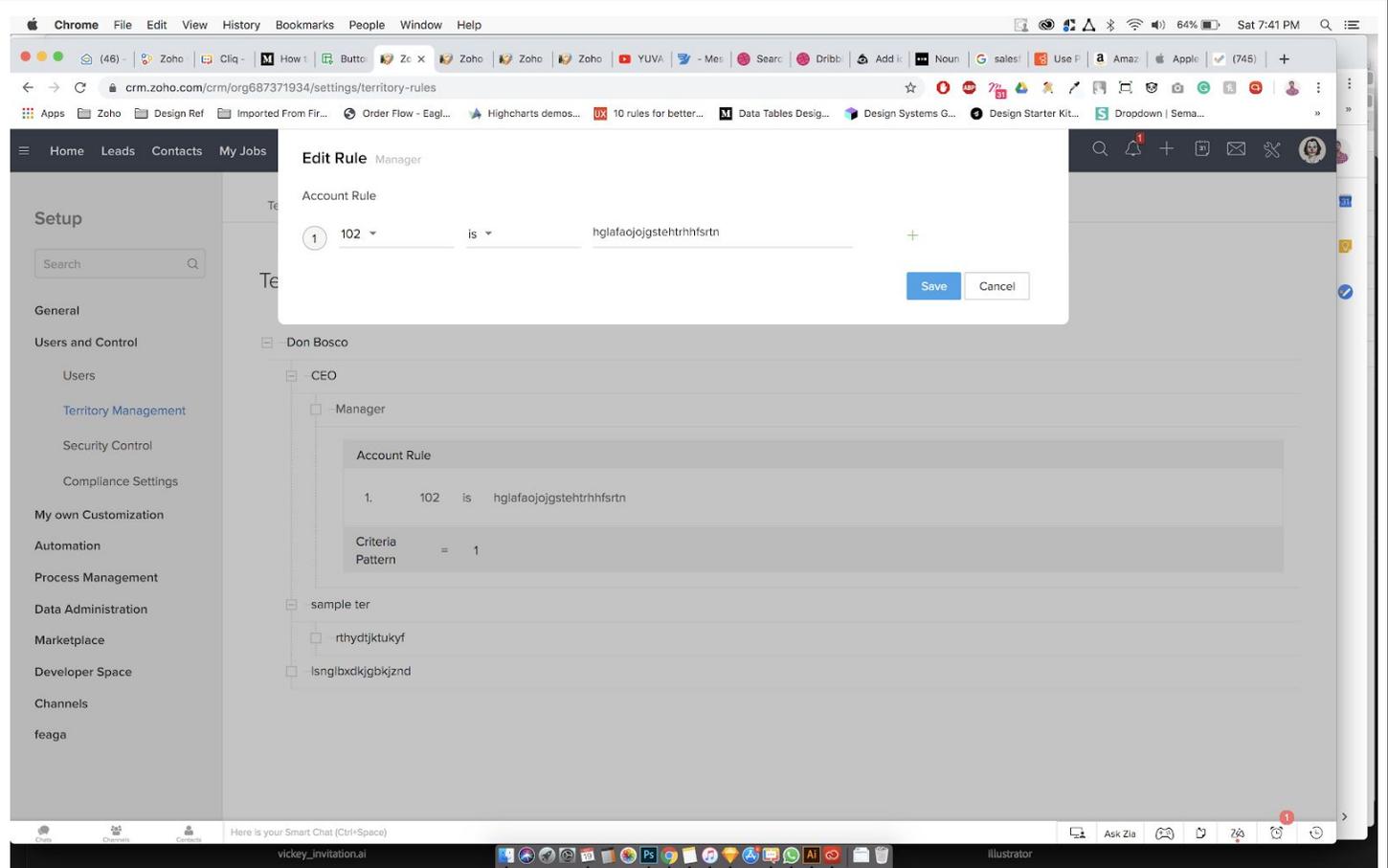


Pain Points: When I click the “view parent rule” I got this popup. Information with cancel button and close icon.

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.

Conclusion:

Page Name : Territory Rules



Pain Points: Unexpected button style. I can see all the primary actions at the right side and the secondary options on the left side.

Solution: Button placement should be changed in the usual style. Save button should be on the right side and cancel button should be left side.

Conclusion:

Page Name : Assign territory

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.

My own criteria ▾

1 None ▾ None ▾ +

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

Include Sub-territories

Search

Pain Points: Search? Here the description is too length so I skip that but I understand I have to select an account to run rule. But here I can see only search button.

Solution: The button should be search account. So that user can able to understand that we can select the account based on criteria/territory.

Conclusion:

Page Name : Security control - Profiles

Home Leads Contacts My Jobs Accounts Deals Activities Reportyt Analytics Products Quotes ...

Setup

Search

General

Users and Control

Users

Territory Management

Security Control

Compliance Settings

My own Customization

Automation

Process Management

Profiles Roles Data Sharing Settings Zoho Mail Add-on Users

Profiles

Profile is a set of permissions dealing with module access and operations, setup customizations, and access to various apps. You can provide different set of permissions to various users.

Help New Profile

PROFILE NAME	PROFILE DESCRIPTION	CREATED BY	MODIFIED BY
Administrator	This profile will have all the permissions. Users with Administrat... More		Sep 23
Standard	This profile will have all the permissions except administrative pr... More		
vickey 2		Sep 3	Sep 23
sf	dd	Sep 17	Sep 17
vickey New		Sep 23	Sep 23

Home Leads Contacts My Jobs Accounts Deals Activitie

Create New Profile

Profile Name

Clone Profile Administrator

Profile Description

Cancel Create

Setup

Search

General

Users and Control

Users

Territory Management

Security Control

Profiles Roles Data Shari

Profiles

Profile is a set of permissions deali set of permissions to various users

PROFILE NAME	PROFILE DESCRIPTION	CREATED BY	MODIFIED BY
Administrator			Sep 23
Standard	This profile will have all the permissions except administrative pr... More		

Pain Points: Here i'm creating a profile but the call to action is simply "New profile"

Solution: CTA should be Create new profile

Conclusion:

Page Name : Security Control - Profile

The screenshot displays the 'Security Control - Profile' interface. At the top, a navigation bar includes 'Home', 'Leads', 'Contacts', 'My Jobs', 'Accounts', 'Deals', 'Activities', 'Reportyt', 'Analytics', 'Products', 'Quotes', and a user profile icon. Below the navigation bar, the page title is 'Profile: Bigilueeee'. On the left, a sidebar lists 'MODULE PERMISSIONS' (Basic, Import/Export, Send Email, Tools, Others) and 'SETUP PERMISSIONS'. The main content area shows 'Basic Permissions' for Leads, Contacts, Accounts, Deals, and Tasks, each with a toggle switch and a dropdown menu. A 'Users in Bigilueeee profile' modal is open, featuring a search bar and a table with columns for 'USER NAME', 'ROLE', and 'STATUS'. The table is empty, displaying 'No users found'. A 'Create new profile' modal is also visible, with fields for 'Profile Name', 'Clone Profile' (set to 'Bigilueeee'), and 'Profile Description', along with 'Cancel' and 'Create' buttons.

Pain Points:

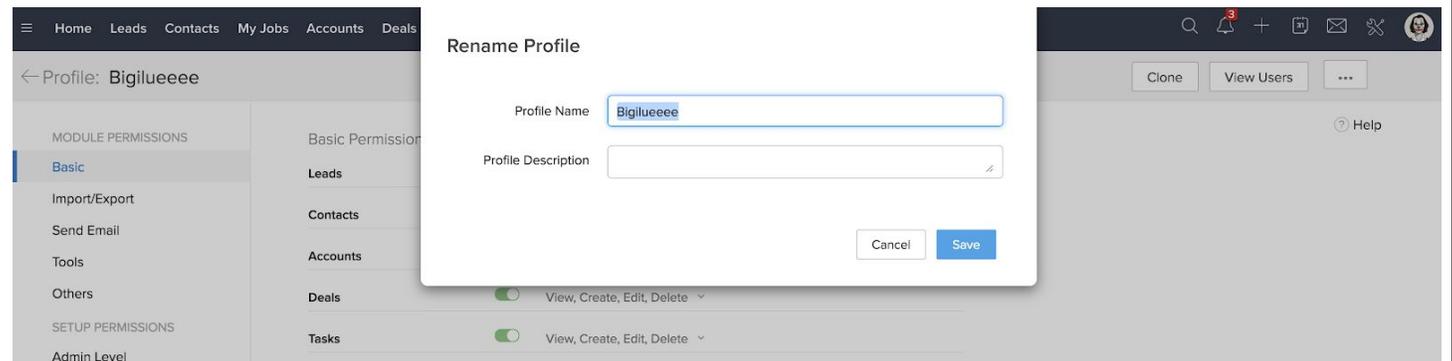
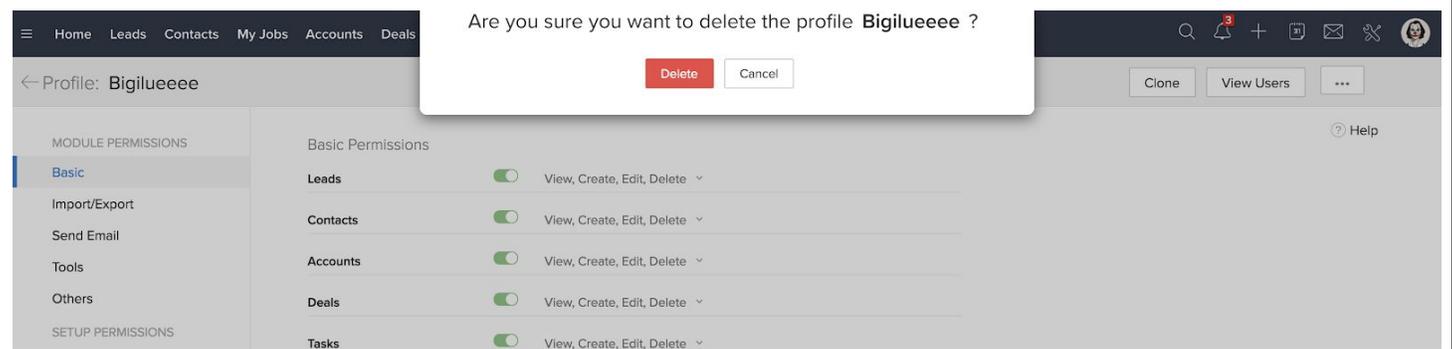
1. Here I can not able to see the Primary action. I don't know how to save these changes. And there is no information about auto save.
2. When I click View user I can see there is no users in this profile, But where can I add the users? There is no option here and I don't know how to add the user here.
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.

Conclusion:

Page Name : Rename & Delete



Pain Points:

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.

Conclusion:

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

☐ CEO

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

Reports To 

Description 

Cancel

Save

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:

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

Reports To 

Description

Cancel

Save

Profiles Roles Data Sharing Settings Zoho Mail Add-on Users

Edit Role

Role Name

Reports To 

Description

Save

Cancel

Pain Points: When I click the create new button the alignment looks usual style. But when I edit the role it's changed to left side.

Solution: Need to 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

Reports To : [Manager](#)

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

Transfer to Role

Cancel

Transfer and Delete

Pain Points:

1. 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.
2. There is no associated users here so How can I associate? There is no option to associate the users.
3. Delete the role - By clicking 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:

1. Need to remove the back button and have to place it on top (before title)
2. We need to place the new button "Associate Users" so that user can associate from here.
3. The field should be mandatory. And need to change the button alignment.

Conclusion:

Page Name : Edit All permission

The screenshot shows the Zoho CRM interface for editing data sharing settings. The page title is "Page Name : Edit All permission". The browser address bar shows the URL: `crm.zoho.com/crm/org687371934/settings/data-sharing/edit`. The page has a dark navigation bar with tabs for Home, Leads, Contacts, My Jobs, Accounts, Deals, Reportyt, Analytics, Activities, Products, and Quotes. A left sidebar contains a "Setup" menu with categories like General, Users and Control, My own Customization, Automation, Process Management, Data Administration, Marketplace, Developer Space, Channels, and feaga. The main content area is titled "Data Sharing Settings" and contains a table with columns for "Profiles", "Roles", and "Data Sharing Settings". The table lists various user groups and their permissions for three different data sharing options: "Private", "Public Read Only", and "Public Read/Write/Delete".

Profiles	Roles	Data Sharing Settings	Zoho Mail Add-on Users
Subform1:	<input checked="" type="radio"/> Private	<input type="radio"/> Public Read Only	<input type="radio"/> Public Read/Write/Delete
Untitled:	<input checked="" type="radio"/> Private	<input type="radio"/> Public Read Only	<input type="radio"/> Public Read/Write/Delete
ContactsXAccounts21:	<input checked="" type="radio"/> Private	<input type="radio"/> Public Read Only	<input type="radio"/> Public Read/Write/Delete
ClassRooms:	<input checked="" type="radio"/> Private	<input type="radio"/> Public Read Only	<input type="radio"/> Public Read/Write/Delete
Parents:	<input checked="" type="radio"/> Private	<input type="radio"/> Public Read Only	<input type="radio"/> Public Read/Write/Delete
Accounts X Users:	<input type="radio"/> Private	<input type="radio"/> Public Read Only	<input checked="" type="radio"/> Public Read/Write/Delete
ContactsXAccounts X Users:	<input type="radio"/> Private	<input type="radio"/> Public Read Only	<input checked="" type="radio"/> Public Read/Write/Delete
New1:	<input checked="" type="radio"/> Private	<input type="radio"/> Public Read Only	<input type="radio"/> Public Read/Write/Delete
Red Module:	<input checked="" type="radio"/> Private	<input type="radio"/> Public Read Only	<input type="radio"/> Public Read/Write/Delete
New1 X Users:	<input type="radio"/> Private	<input type="radio"/> Public Read Only	<input checked="" type="radio"/> Public Read/Write/Delete
New1 X Campaigns:	<input checked="" type="radio"/> Private	<input type="radio"/> Public Read Only	<input type="radio"/> Public Read/Write/Delete
Subform1 X Users:	<input type="radio"/> Private	<input type="radio"/> Public Read Only	<input checked="" type="radio"/> Public Read/Write/Delete
Leads X Users:	<input type="radio"/> Private	<input type="radio"/> Public Read Only	<input checked="" type="radio"/> Public Read/Write/Delete

At the bottom of the table, there are "Save" and "Cancel" buttons.

Pain Points: Call to action is not visible in the first visit

Solution: Button should be placed on the top right with default style. So that user can able to easily identify.

Conclusion:

Page Name : Sharing Rules

Profiles Roles Data Sharing Settings Zoho Mail Add-on Users

Sharing Rules

Leads:

+ New Sharing Rule

SHARED FROM	SHARED TO	PERMISSION TYPE	SUPERIORS ALLOWED
RS: Manager	RS: Manager	Read-only	<input type="checkbox"/>

Accounts:

+ New Sharing Rule

SHARED FROM	SHARED TO	PERMISSION TYPE	SUPERIORS ALLOWED
G: erghr	G: febrgn	Read/Write/Delete	<input checked="" type="checkbox"/>

Contacts:

+ New Sharing Rule

No sharing rules created.

Home Leads Contacts My Jobs Accounts Deals Reportyt Analytics Activities Products Quotes ...

Setup

Search

General

Users and Control

Users

Territory Management

Security Control

Compliance Settings

My own Customization

Automation

Process Management

Data Administration

Profiles Roles Data Sharing Settings Zoho Mail Add-on Users

New Sharing Rule

Help

This page allows you to create sharing rules for the selected module.

Records Shared From

Records Shared To

Access Type

Superiors Allowed

Cancel

Create Sharing Rule

Pain Points:

1. Repeated button for every module. And 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.

Conclusion:

Page Name : Organise Modules

Organize Modules

You can choose to show or hide modules, or change the order in which they are displayed in the tab.

Search

- Delas Account link module
- Class Rooms
- Students specific
- Projects
- s
- New1
- Red Module
- Desk
- guide

Cancel Save

Organize Modules

SHARED TO	LAST MODIFIED
All Profiles	October 08, 2019
All Profiles	October 17, 2019
All Profiles	August 29, 2019
All Profiles	October 01, 2019
All Profiles	September 17, 2019
All Profiles	August 26, 2019
All Profiles	
All Profiles	October 19, 2019
All Profiles	September 03, 2019
All Profiles	September 03, 2019

Pain Points:

1. Button Alignment is different. When I try to hide the module I have uncheck the module in a list suddenly it goes down in the list. I try to move to the same position and then click the save. Why it should goes down?

Solution:

1. Button Alignment should be right side. And when I uncheck the module it should be in the same place so that I can understand it's hide in the same position. When I needed I can click the check again and it comes to the same position. If needed I can move this to another place.

Conclusion:

Page Name : Module

Leads

[Layouts](#) [Layout Rules](#) [Validation Rules](#) [Fields](#) [Links and Buttons](#) [Summary](#)

Design your own layouts to fit your business processes, then assign them to your user accounts based on permission profiles.

New Layout

Layout Assignment

NAME	SHARED TO	LAST MODIFIED	STATUS
------	-----------	---------------	--------

Leads

[Layouts](#) [Layout Rules](#) [Validation Rules](#) [Fields](#) [Links and Buttons](#) [Summary](#)

Layout rules allow you to manage sets of fields and sections. Define your own rules to match your layout with how you do business.

All Layouts ▾

+ New Layout Rule

NAME	PRIMARY FIELD	LAYOUT	LAST MODIFIED	STATUS
------	---------------	--------	---------------	--------

[Layouts](#) [Layout Rules](#) [Validation Rules](#) [Fields](#) [Links and Buttons](#) [Summary](#)

Set validation rules to verify data a user enters within a record before saving.

All Layouts ▾

New Validation Rule

FIELD NAME	VALIDATE USING	EXECUTES ON	LAYOUT NAME	LAST MODIFIED	STATUS
------------	----------------	-------------	-------------	---------------	--------

Pain Points: Having Different Style buttons in the next tabs looks inconsistent of the create button.

Solution: We should follow the same style in all these places. Create Layout, Create Layout Rule, Create Validation Rule.

Conclusion:

Page Name : Fields

Leads

Layouts Layout Rules Validation Rules **Fields** Links and Buttons Summary ? Help

Field Listing Field Permissions Personal Fields

All Layouts + Create & Edit Fields

FIELD LABEL	DATA TYPE	CUSTOM FIELD	LAYOUTS
Account	Lookup	✓	adsfdghgh and Standard
Annual Revenue	Currency		adsfdghgh , Custom Layout and Standard
Attachments	File Upload	✓	adsfdghgh and Standard
Average Time Spent (Minutes)	Decimal		adsfdghgh , Custom Layout and Standard

Pain Points: Got bit confusion about the button. Is it Add/Create/Edit fields

Solution: Actual function is edit the fields in the existing modules so the call to action should be Edit Fields.

Conclusion:

Page Name : Links & Buttons

Leads

Layouts Layout Rules Validation Rules Fields **Links 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 + New Button + New Link

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 edit	Edit Page	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.

Conclusion:

Page Name : Field Permission

The screenshot shows the Zoho CRM interface for managing field permissions for the 'Leads' module. The 'Field Permissions' tab is active, displaying a table with the following data:

FIELD LABEL	READ AND WRITE	READ ONLY	DON'T SHOW
Account	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Annual Revenue	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Attachments	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Average Time Spent (Minutes)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
City	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Company	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Country	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Created By	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Currency	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Date/Time 1	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

At the bottom of the table, the 'Save' and 'Cancel' buttons are misaligned. The 'Save' button is positioned to the left of the 'Cancel' button, which is not the standard design for these types of buttons.

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 Name : Module Builder

The screenshot shows a 'Module Builder' interface for a 'Leads' module. On the left, there is a 'New Fields' sidebar with a grid of field types: Single Line, Multi-Line, Email, Phone, Pick List, Multi-Select, Date, Date/Time, Number, Auto-Number, Currency, Decimal, Percent, Long Integer, Checkbox, URL, Lookup, Formula, User, and File Upload. The main area is titled 'CREATE' and contains two subforms. 'Subform 1' is a table with columns: 'Single Line 1' (containing 'Single Line'), 'Single Line 2' (containing 'Single Line'), 'Email 1' (containing 'Email'), and 'Phone 1' (containing 'Phone'). Each column has a three-dot menu icon to its right. A '+ Add Field' button is located at the end of the row. 'Subform 3' is a dashed box containing a '+ Add Field' button. At the top right of the main area, there are three buttons: 'Cancel', 'Save and Close', and 'Save'.

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.

Conclusion:

Page Name : Layout Rule

The screenshot shows a Zoho CRM interface for configuring a layout rule. The page title is "ewretyy" and it is under "Leads / Custom Layout". The rule is defined by a "WHEN" condition: "City is chennai" AND "is sfdgf" AND "is kjgkg". The actions are: "Show Fields(2) Show Sections(1) + Trigger an action", "Show Sections(1) + Trigger an action", and "+ Trigger an action". A "Choose an option" button is visible at the bottom left of the rule configuration area.

Pain Points:

1. Here the "+" conveys Add trigger an action.
2. There is no save/Cancel button on this page.
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

Solution:

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"

Conclusion:

Page Name : Validation Rule

WHEN

Website

is google

Rule applied for, Company is zfbeshb

show verb 9/100

Rule applied for, Company isn't gveabsrtbn

Enter your alert message here 0/100

+ Add another option

Add another option

Specify criteria to validate

Website None Done Cancel

Which records would you like to apply the rule to?

All Records Choose based on specific conditions

1 City is egsntrs +

Cancel Done

Pain Points:

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.

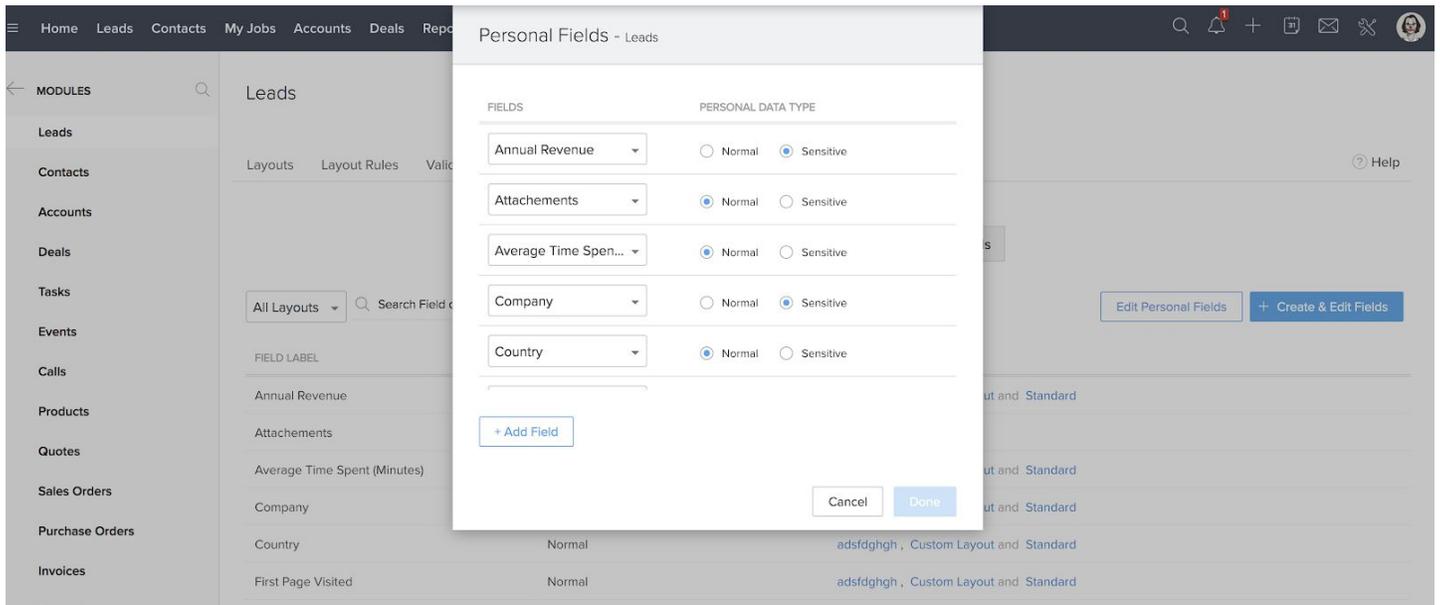
Solution:

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.

Conclusion:

Page Name :Fields - Personal Fields



Pain Points: "+" and "Add" convey the same meaning.

Solution: Need to remove the "+" and the action is "Add Field"

Conclusion:

Page Name : Tag Group

The image displays two side-by-side screenshots of a 'Tab Groups' dialog box. Both dialog boxes have a title bar with a close button (X) and a name input field. The left dialog box is titled 'Tab Groups' and has the name 'Sales' entered. Under the 'Tabs' section, the following items are checked: Home, Leads, Contacts, Accounts, Deals, and Reportyt. Under the 'Permissions' section, under the 'PROFILES' heading, the following items are checked: Administrator and Standard. The right dialog box is also titled 'Tab Groups' but has an empty name field. Under the 'Tabs' section, the following items are checked: Home and Feeds. Under the 'Permissions' section, under the 'PROFILES' heading, the following items are checked: Administrator. Both dialog boxes have 'Cancel' and 'Save' buttons at the bottom.

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.

Solution:

1. When I click the edit the title should be "Edit Tab Group".
2. When I create New tab group the title should be "Create New Tab Group" and the call to action should be "Create"

Conclusion:

Page Name : Tab Groups

Modules and Fields [Tab Groups](#) Web Tabs

Tab Groups

You can create up to **25** tab groups. Each tab group can contain an unlimited number of tabs. The tabs visible in a group may differ depending on the user's profile permissions.

[+ New Tab Group](#)

GROUP NAME	TABS
Sales	Home,Leads,Contacts,Accounts...
marketing	Home,Feeds,Leads,Contacts...
super deluxe	Home,Leads,Contacts,My Jobs...

Pain Points:

1. Here the call to action is add new but its purpose is to create new tab group.
2. We have a lot of space we not yet show all the tabs in the list.

Solution:

1. Call to action should be "Create Tab Group"
2. Need to show all tabs/maximum tabs in the list.

Conclusion:

Page Name : Web Tabs

Modules and Fields Tab Groups Web Tabs

Web Tabs

Web tabs let you open web pages, like intranet pages, company-wide announcements, or web applications, inside Zoho CRM. These tabs can be viewed by any Zoho CRM users in your organization. You can also create 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

[? Help](#)

Tab Name

Source Links Widgets

Link [GO](#)

Append Parameters

Web Tab Access

[Save](#)

[Cancel](#)

Pain Points:

1. Again the "+New Tab"
2. Button alignment is different than usual.

Solution:

1. Call to action should be Create Web Tab
2. Button should be default style(Primary on the right side).

Conclusion:

Page Name : Templates

Templates

Email Inventory Mail Merge

All Modules Search Template

+ New Template

All Templates

Favorites

Associated Templates

Created by me

Shared with me

Public Email Templates

TEMPLATE NAME	MODIFIED BY	LAST USED	STATS
☆ Sfdghn Leads · resdgh	Vignesh G Sep 02		-
☆ Welcome Contacts · Subject	Vignesh G Aug 28	Aug 31	30.8% 4/13
☆ Red Leads · hghgh	Prakash Sekar May 31	Oct 15	1% 5/497
☆ Big Deal Alert Deals · Big Deal Alert		May 29	-

Leads

Insert HTML / Plain Text

Templates

Email Inventory Mail Merge

All Modules Search Template

+ New Template

All Templates

Favorites

Created by me

Shared with me

Public Mail Merge Te...

TEMPLATE NAME	MODIFIED BY	LAST USED
☆ Red.docx Leads	Prakash Sekar May 31, 2019	

Pain Points:

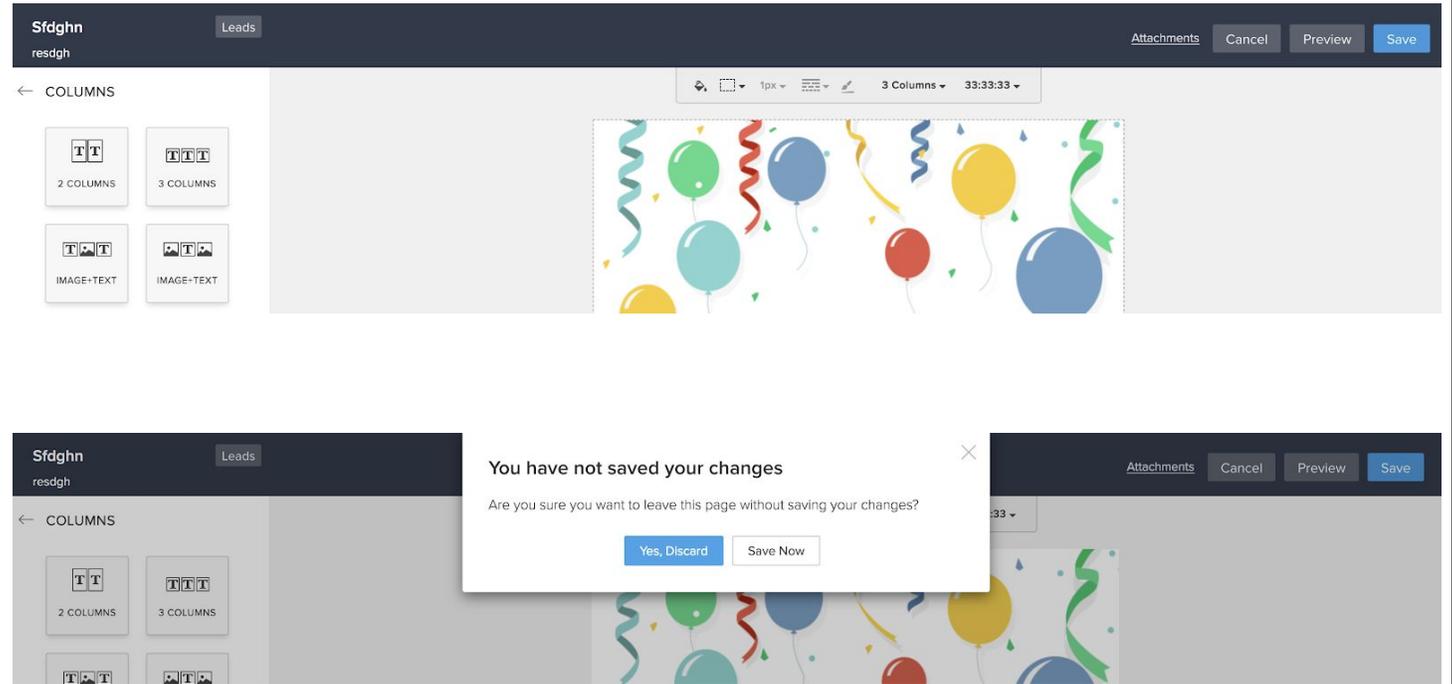
1. Instead of creating new one we use "+ new button"
2. Different style for call to action
3. The icon looks like a download icon.

Solution:

1. Need to replace the literal as Create New Template.
2. This action should be primary for this page so need to change this as a primary button.
3. Need to replace the icon with dropdown and inside that we can show the "import template" so that user can easily identify the two options.

Conclusion:

Page Name : Edit Template



Pain Points:

1. Alert popup is different than usual style.

Solution:

1. Need to follow the default alert style.

Conclusion:

Page Name : Customize home page

Customize Home page

[? Help](#)

You can create custom homepage layouts for each role, making it easier for employees to complete their daily task efficiently.

[+ New Home Page](#)

NAME	SHARED WITH	DESCRIPTION	LAST MODIFIED	STATUS
New homepage	Manager	dsfdbf	Sep 24, 2019	<input checked="" type="checkbox"/>
New Page	CEO	new homepage	Oct 15, 2019	<input checked="" type="checkbox"/>

Untitled Homepage

[Save & Share](#)

[Cancel](#)

DASHBOARD >

CUSTOM VIEW >

Home Leads Contacts My Jobs Accounts Deals Reportyt Analytics Activities Products Web tab ...

Search Notifications + 31 Email Share Profile

New homepage ...

[Save](#)

[Cancel](#)

DASHBOARD >

CUSTOM VIEW >

Leads THIS MONTH

4 ▼ 33.3%

Last Month: 6

Deals IN PIPELINE

382

Accounts THIS MONTH

125.0% 9

Last Month: 4

Lead GENERATION TARGET - THIS YEAR

REVENUE TARGET - THIS YEAR

Entire Org

ALL 3 456.00

Target: ALL 10 000.00

Pain Points:

1. Primary action is creating a new homepage but is adding a new one to the list.
2. Button alignment is different than the usual one.

Solution:

1. Primary action should be "Create Home Page"
2. Button alignment - Primary should be on the right side.

Conclusion:

Page Name : Customize home page

[Translation Settings](#) [Language Import History](#)

Translation Settings

[Help](#)

Translations allows you to translate field names and picklist values between 25 languages within Zoho CRM. Export the language files you wish to translate. Import them back after the translation.

[Add Language](#)

[Import](#)

[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 Kingdom)	en_GB		Yet to Translate	Export ↓
Czech	cs_CZ		Yet to Translate	Export ↓

The screenshot shows the 'Translation Settings' page with a modal dialog box titled 'Delete Language - Chinese(Taiwan)'. The dialog contains the following text: 'You are about to delete a language for which the translation has already been done. On deletion, all translated text in this language will be lost and cannot be restored. Are you sure you want to delete this language?'. At the bottom of the dialog are two buttons: 'Cancel' and 'Delete Language'. The background page shows a table of languages and three primary buttons: 'Add Language', 'Import', and 'Export All'.

Pain Points:

1. Placed three primary buttons in a row.
2. Alert/Delete info is different than usual style.

Solution:

1. Primary button should be "Add Language". And the secondary buttons should be import and export all.
2. Need to follow one style for all the alert/info.

Conclusion:

Page Name : Schedules

Schedules

[? Help](#)

Schedules are customizable actions that can be triggered automatically using functions. Schedules can be used to integrate your Zoho CRM data with Zoho apps, your company's website, and other third-party applications.

[+ Create New Schedule](#)

[Schedules](#) [Failures](#)

SCHEDULE NAME	LAST RUN	NEXT RUN	FREQUENCY	STATUS
fxgchvjbkn	Aug 28	Completed	Once	<input type="checkbox"/>
gfdfd	Sep 13	Completed	Once	<input type="checkbox"/>

Pain Points: "+" used before the call to action

Solution: Need to remove the "+" and the call to action should be Create New Schedule.

Conclusion:

Page Name : Create Schedules

Create New Schedule

[? Help](#)

Schedule Name	wegrthey	Add Description
Function to be executed	red	
Execution Start Date	10/27/2019	05:00 PM
Frequency	Every day	
Ends	<input checked="" type="radio"/> Never	
	<input type="radio"/> After <input type="text" value="1"/> Times	
	<input type="radio"/> On 10/27/2019	

[Save](#)

[Cancel](#)

Pain Points: For Creating the new schedule the call to action not explain the same message.

Solution: Call to action should be Create/Create Schedule. And alignment should be right side.

Conclusion:

Page Name : Schedule Function

sdfghj
Function Description Close Save & Execute Save

Deluge Tasks void fghfj() [Edit Arguments](#) Help

BASIC

- 1
- set variable
- add comment
- info

CONDITION

- if

xvcbn
Function Description Close Save & Execute Save

Deluge Tasks void gfdhjb() [Edit Arguments](#) Help

CONDITION

- 1 vdgxfhhfgdbgnf c = <expression> ;}
- 2 info <expression> ;
- 3 else if (<variable> <opr> <expression>)
- 4 {
- 5 }
- 6 sendmail
- 7 [

Console

Failed to save the function
Syntax error. Expecting statement. Found 'c'. Line Number: 1

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 saves and execute the function. Same thing happen for save&execute. If anything error in the function I can see the error on the right side. It happens for both buttons. Then what is the purpose of two here.
Suggestion to keep only one button save/Save&execute.

Conclusion:

Page Name : Email Notifications

Setup

Search

General

Users and Control

My own Customization

Automation

Schedules

Actions

Assignment Rules

Case Escalation Rules

Scoring Rules

Workflow Rules

Process Management

Email Notifications Tasks Field Updates Webhooks Functions

New Email Notification Help

Name

Module

Email Recipients

Additional Recipients

Email Template

From

[Add Reply To](#)

Email Notifications Tasks Field Updates Webhooks Functions

hello

Name **hello**

Module **Contacts**

Email Recipients **Person associated to the Contact**

1. Contact: User 1

Email Template: **Welcome**

Related Rules

Not associated with any Automation rule

Pain Points:

1. Button alignment is different.
2. There is no way to go back. If a user come to this page there is only two ways one I need to edit or I need to delete this.
3. Show recipients and email template not looks like a button.

Solution:

1. Button alignment should be right side.
2. Need to provide back button here.
3. We don't have seperate style in lyte. We already have designs for (Upload, choose recipient, browse) kind of action. Need to follow the same.

Conclusion:

Page Name : Tasks

Email Notifications **Tasks** Field Updates Webhooks Functions

Tasks

[? Help](#)

These are tasks assigned to users when Workflow Rules, Blueprints, or Approval Processes are executed.

[+ Create Task](#)

SUBJECT	ALL MODULES ▾	DUE DATE	PRIORITY	STATUS	ASSIGNED TO
Reminder task for - \${Tasks.Subject}	Tasks	Reminder minus 1 day(s)	Highest	Waiting for input	
Reminder for deferred task - \${Tasks.Subject}	Tasks	Reminder minus 1 day(s)	Highest	Deferred	

Pain 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.

Solution:

1. Button text should be Create New Task.
2. Title should be create workflow task and the button text is create task.

Conclusion:

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 go back. If a user come to this page there is only two ways one I need to edit or I need to delete this.

Solution: Need to provide back button here.

Conclusion:

Page Name : Field Update

Email Notifications Tasks **Field Updates** Webhooks Functions

Field Updates

? Help

Field update actions allow you to update the values of specified fields when the associated Workflow Rules, Blueprints, or Approval Processes 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** Webhooks Functions

New Workflow Field Update

Name

Module Leads ▾

Update None ▾ =

Save

Cancel

Pain Points:

1. + used in the starting.
2. Title and call to action should be the same.

Solution:

1. Button should be create field update. Need to remove “+”
2. Here the field update is applicable for blueprint, workflow, approval process so Title should be “Create New Field update” as common for all. Call to action should be create.

Conclusion:

Page Name : Field Update

Email Notifications Tasks **Field Updates** Webhooks Functions

Field Update Details

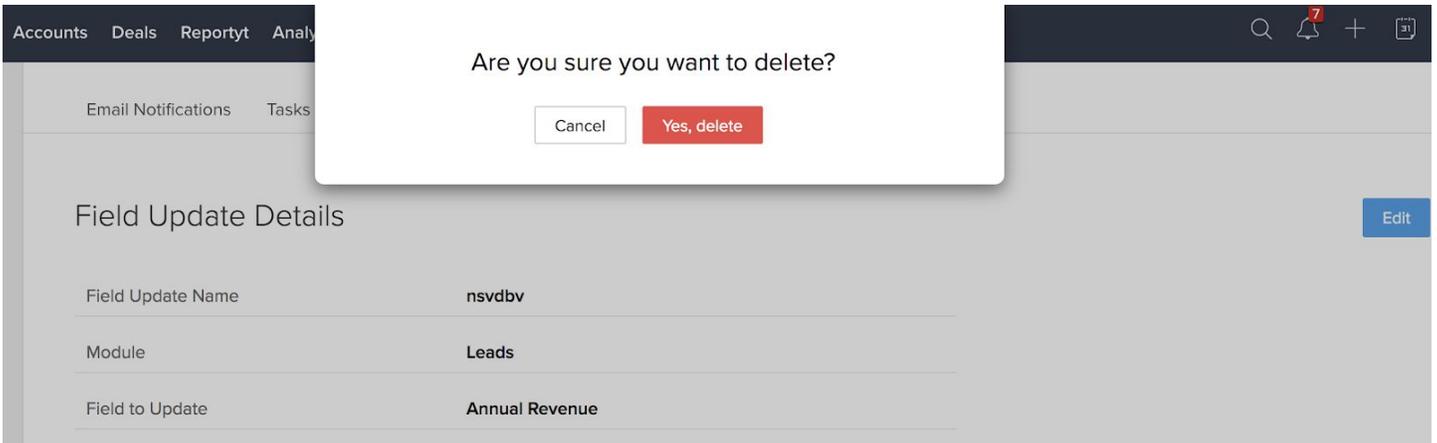
Edit

Delete

Field Update Name	Lead
Module	Leads
Field to Update	Company
New Value	google

Related Rules

Rule Name	Type	Module	Layout	Field	Execute On	Status
sample	Workflow Rule	Leads			Create	✓



Pain Points:

1. There is no way to go back.
2. Alert popup should be consistent all over the pages.

Solution:

1. Need back button on this page. So that we can keep consistency on all the pages.
2. Need to change the alert info with title and proper description and button alignment.

Conclusion:

Page Name : Webhooks

Email Notifications Tasks Field Updates **Webhooks** Functions

Webhooks

Webhooks let you communicate with third-party applications by sending instant web notifications when a particular event occurs.

[List of Webhooks](#) Failures ? Help

[Configure Webhook](#)

NAME	ALL MODULES ▾	URL TO NOTIFY	CUSTOM PARAMETERS
------	---------------	---------------	-------------------

Email Notifications Tasks Field Updates **Webhooks** Functions

New Webhook

Name

URL to Notify Example: <https://yourdomain.com/getNotified.do> //

Method POST GET

Description //

Module Leads ▾

URL Parameters

Append Entity Parameters

Append Custom Parameters (Like API Key, Auth Token, etc.)

Preview URL // (Refresh)

[Save](#) [Cancel](#)

Pain Points: Title and call to action should be relevant to the mail action. The functionality is creating new webhooks.

Solution:

1. Call to action should be "Create new webhooks"
2. Title is "Create New webhooks. And the CTA should be Create.

Conclusion:

Page Name : Functions

← Existing Functions

[? Help](#)

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

new

Configure

dsfzdgfhcgvj

Configure

Capturing Sales Region

Global sales region is geographically categorized as US, UK, Europe-MiddleEast-Asia EMEA , SAMERICA South America and Asia Pacific APAC . This function will determine the sales region based on countries. There are a few predefined countries using which the function is written. You can include as many countries as you like to determine the sales region. Here is how you map the arguments of the custom function to achieve it. 1. leadId: Choose Lead Id column from the list of fields. 2. country: Choose Country column from the list of fields. How to make it work? Associate this custom function under the appropriate workflow rule to capture sales regions based on countries.

Duplicate

Already used in Leads

← Gallery [?](#)

Configure a function to satisfy your business needs.

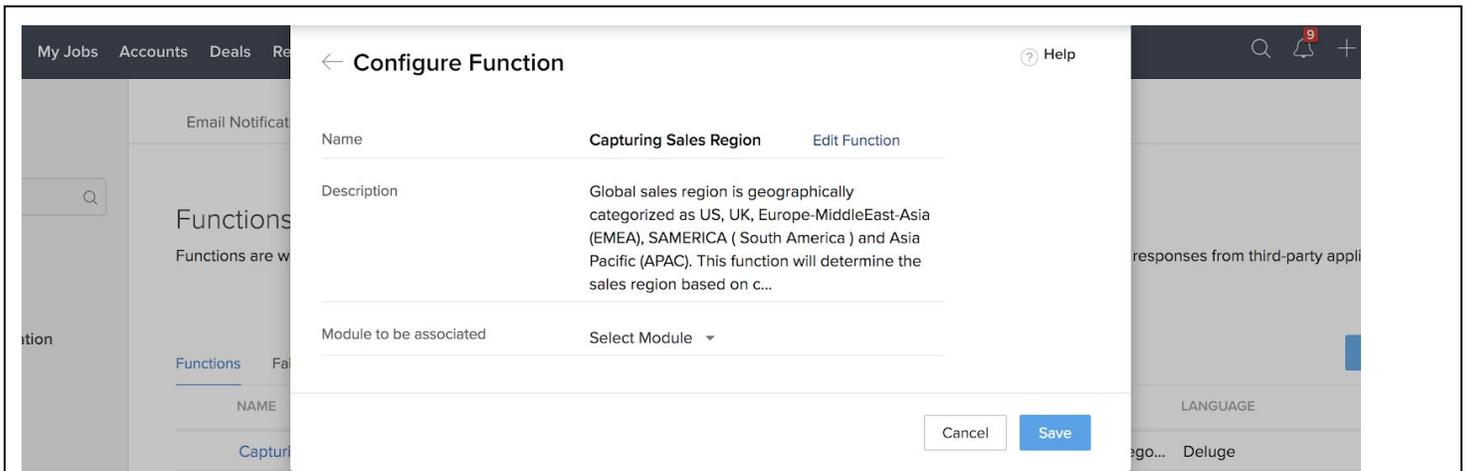
Capturing Sales Region

Global sales region is geographically categorized as US, UK, Europe-MiddleEast-A...

Configure

Lead Scoring

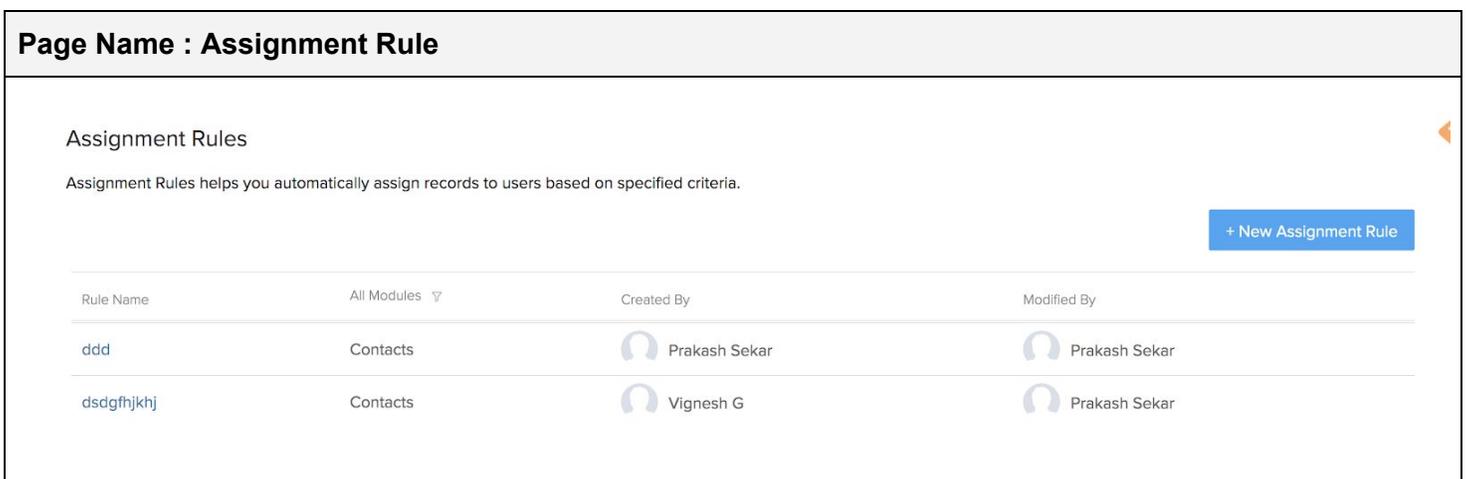
Lead Scoring is a methodology used to rank leads based on a scale that represent...



Pain Points: As a user when I click the configure function I have to select the function from gallery or existing function so the configure button is irrelevant here.

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.

Conclusion:

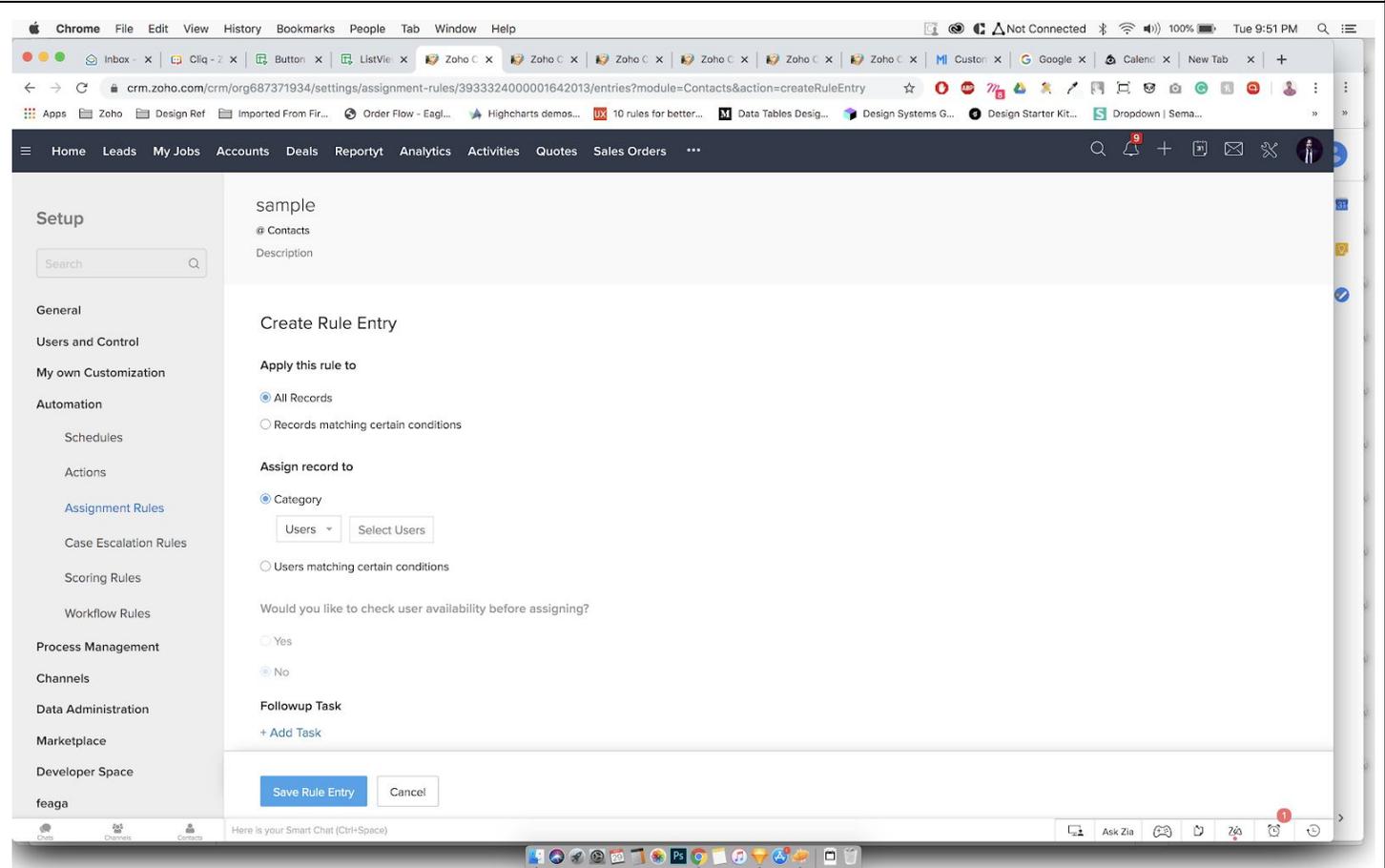


Pain Points: When as a user i’m creating the new assignment rule but CTA shows “+New”

Solution: CTA should be Create assignment rule.

Conclusion:

Page Name : Assignment Rule detail page



Pain Points:

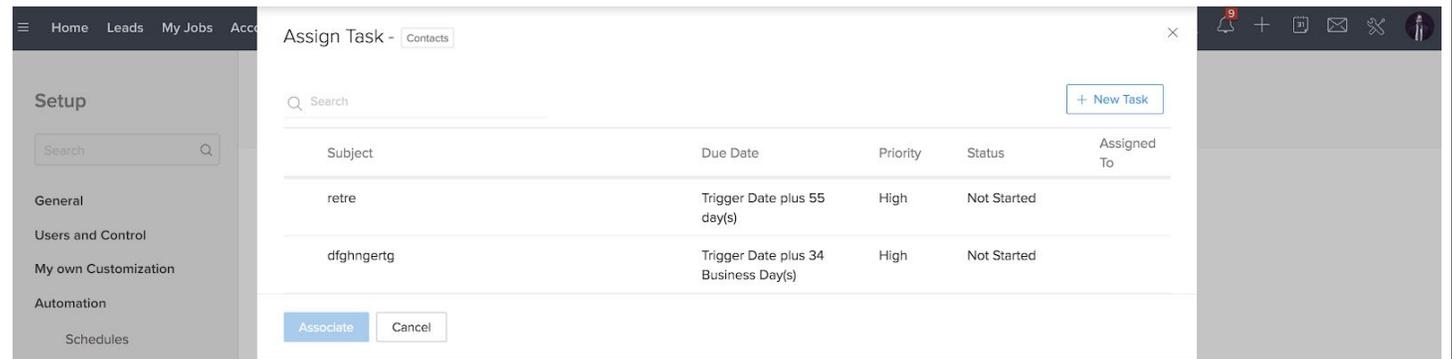
1. Below the assign record the “select users” action not looks like a button.
2. As a user I have an option to assign/Associate task to this rule but it shows “+add task”
3. Title is different than “Assignment Rule”. Call to action is looks like save the edited entry.

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.

Conclusion:

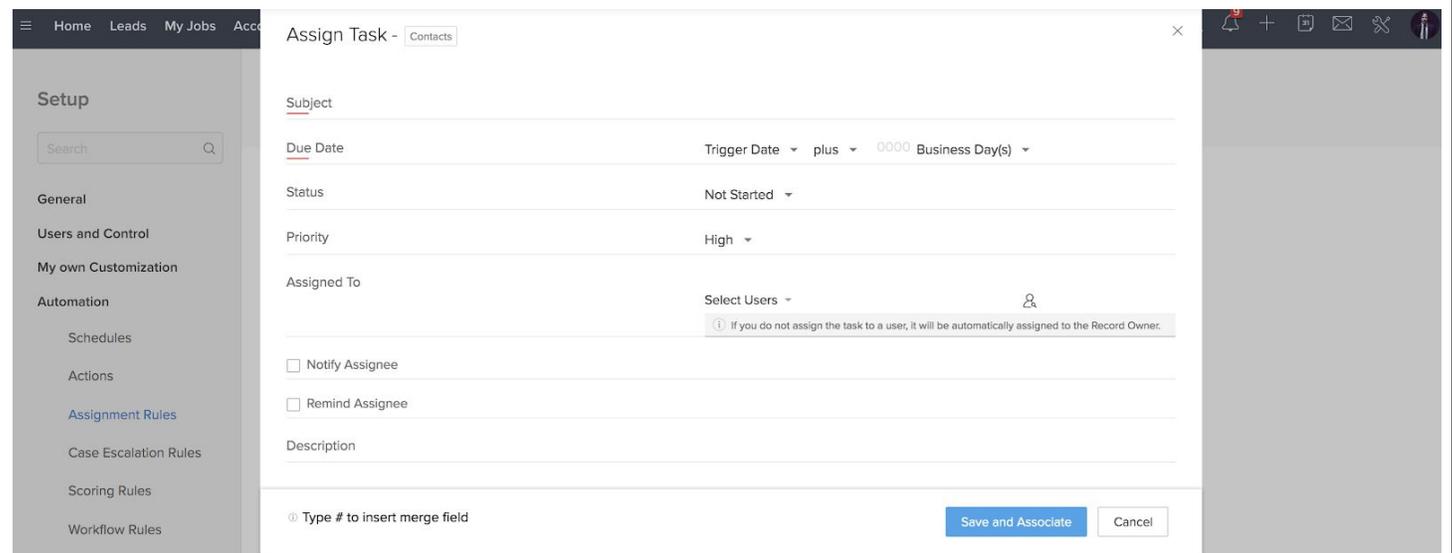
Page Name : Assignment rule - Assign task.



The screenshot shows a modal window titled "Assign Task - Contacts". On the left is a "Setup" sidebar with a search bar and categories: General, Users and Control, My own Customization, and Automation (with "Schedules" selected). The main area contains a table with the following data:

Subject	Due Date	Priority	Status	Assigned To
retr	Trigger Date plus 55 day(s)	High	Not Started	
dfghngertg	Trigger Date plus 34 Business Day(s)	High	Not Started	

At the bottom of the table are "Associate" and "Cancel" buttons. A "+ New Task" button is located in the top right corner of the modal.



The screenshot shows the configuration form for the "Assign Task" dialog. The "Subject" field is filled with "retr". The "Due Date" is set to "Trigger Date plus 0000 Business Day(s)". The "Status" is "Not Started", "Priority" is "High", and "Assigned To" is "Select Users". There are checkboxes for "Notify Assignee" and "Remind Assignee", both of which are unchecked. The "Description" field is empty. At the bottom, there is a "Save and Associate" button and a "Cancel" button. A tooltip below the "Assigned To" field reads: "If you do not assign the task to a user, it will be automatically assigned to the Record Owner." A note at the bottom left says "Type # to insert merge field".

Pain Points:

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

Solution:

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

Conclusion:

Page Name : Workflow Rules

Rules Usage

Workflow Rules Help

Workflow rules allow you to perform certain automatic actions on specific records based on filter criteria. Workflow automations can send emails, update fields, create records and much more.

Search Reorder Rules + Create Rule ☰

Rule Name	All Modules ▾	Execute On	Actions	Last Modified	All Status ▾
sample	Leads	Create	3	Sep 02, 2019	<input checked="" type="checkbox"/>
Task Test	Tasks	Create or Edit	2		<input checked="" type="checkbox"/>
vbcnvcmbn,m.,	Contacts	Create	2		<input checked="" type="checkbox"/>

Pain Points: “+ Create Rule”

Solution: Remove “+” and use Create Rule.

Conclusion:

Page Name : Workflow - Assign task

Assign Task - Contacts

Search + New Task

Subject	Due Date	Priority	Status	Assigned To
retre	Trigger Date plus 55 day(s)	High	Not Started	
dfghngertg	Trigger Date plus 34 Business Day(s)	High	Not Started	

Associate Cancel

Pain Points:

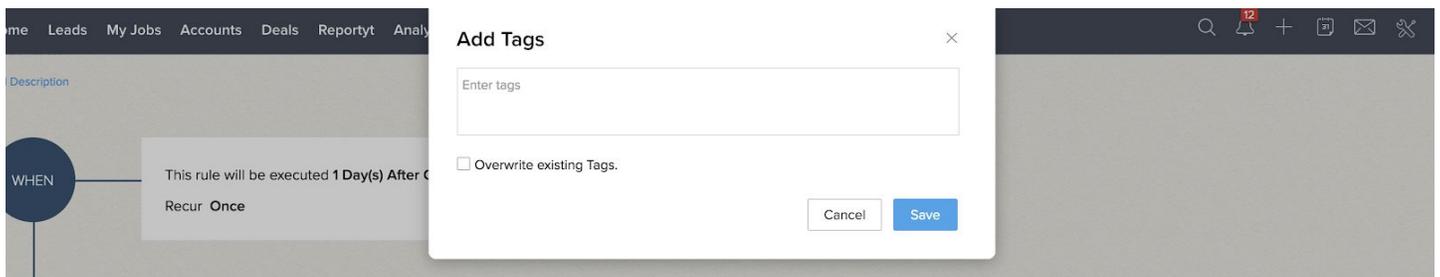
1. Title and the main call to action is different.
2. Again “+new Task”

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.

Conclusion:

Page Name : Workflow - add tag



Pain Points:

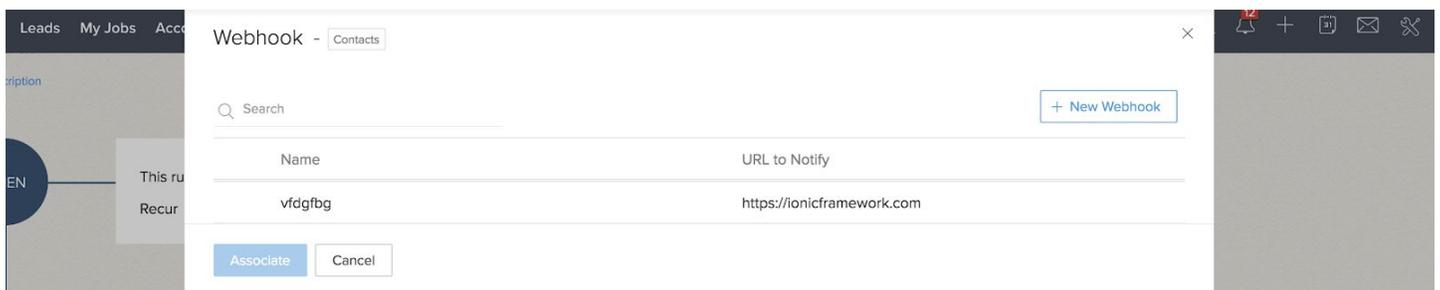
1. Every popup in this feature have left alignment but this button alignment is different than others.
2. Add is more meaningful than save

Solution:

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

Conclusion:

Page Name : Workflow - webhooks



Pain Points:

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

Solution:

1. Need to follow the "Assign Task" style here.

Conclusion:

Page Name : workflow - Email Notification

The image displays three sequential screenshots of a web application interface for managing email notifications within a workflow.

Top Screenshot: Shows a list of email notifications. The header includes a search bar and a '+ Create Email Notification' button. The table below has columns for 'Name' and 'Email Template'. Two entries are visible: one with name 'fcghvjk' and template 'Welcome', and another with name 'hello' and template 'Welcome'. At the bottom, there is a checkbox for 'Send this email notification at Best Time to Email.' and 'Associate' and 'Cancel' buttons.

Middle Screenshot: Shows the 'Edit' view for an email notification. It includes a 'Name' field, an 'Email Recipients' field with a 'Choose recipients' button, an 'Additional Recipients' field with a note 'Use commas to separate additional email addresses.', and an 'Email Template' field with a 'Select Template' button. The 'Best Time to Email' checkbox and 'Save and Associate'/'Cancel' buttons are also present.

Bottom Screenshot: Shows the 'Select Template' dialog. It features a dropdown for 'All Templates', a search bar for 'Search Template', and a '+ Create Template' button. A list of templates is shown below, with 'Welcome' selected and labeled as a 'Public Email Template'.

Pain Points:

1. Popup type is not consistent for 1&2 image.
2. "+" added before call to action in the template selection page.

Solution:

1. Need to follow the "Assign Task" style.
2. Need to remove the "+". And the call to action should be Create Template.

Conclusion:

Page Name : Workflow - Remove action, Cancel workflow

Remove Scheduled Action

You are about to remove a scheduled action. By doing so, all of its associated actions will be removed. Are you sure you want to remove it?

Cancel Workflow

The changes made to this workflow rule have not been saved. Are you sure you want to discard your changes?

Pain Points: Two type of alert message style used in the same feature.

Solution: Need to follow the same style for alert/delete info.

Conclusion:

Page Name : Alignment Issue

The image displays three screenshots of Zoho CRM edit forms, illustrating alignment issues with buttons. The first screenshot, titled 'Edit Email Notification', shows a 'Save and Associate' button on the left and a 'Cancel' button on the right. The second screenshot, titled 'Edit Field Update', shows both 'Save and Associate' and 'Cancel' buttons aligned to the right. The third screenshot, titled 'Edit Task', shows both buttons aligned to the right. The background of all screenshots shows a workflow rule editor with a diamond-shaped condition and a sidebar with options like 'Add another condition', 'Tasks', 'Field Update', and 'Lead'.

Pain Points: When I create/assign new task/field update/email notification/webhooks the button alignment is on left side. When I click the edit all the button alignments are different.

Solution: Need to follow the similar style to all the buttons for create&Edit pages.

Conclusion:

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 Leads that do not meet any of the above conditions

1

Account ▾

is ▾

erdt|

+

Cancel

Next

Execute Hour(s) ▾ After Rule Trigger Date

Next Cancel

⌚ Scheduled Actions

Execute Hour(s) ▾ After Rule Trigger Date

Next Cancel

Email Notifications

asdfghj

Pain Points: Used cancel for some places with different alignment.

Solution: Need to keep consistency across all the criteria editor.

Conclusion:

Page Name : Workflow - Add new criteria, Save button

The screenshot displays a Zoho CRM workflow rule configuration interface. The workflow is named 'sample' and is associated with the 'Leads' object. The trigger is 'WHEN' (Lead is created). The condition is 'CONDITION 1' (Lookup 1 IS zoho). The actions are divided into 'Instant Actions' (Tasks: Follow up - \${Leads.Last Name} for \$[...], Field Updates: Lead) and 'Scheduled Actions' (Execute 3 hour(s) AfterRule Trigger Time, Email Notifications: asdfghj). A '+ Add another condition' button is present on the left. At the bottom, there are 'Save' and 'Cancel' buttons. The browser address bar shows 'crm.zoho.com/crm/org687371934/settings/workflow-rules/393332400001073129'.

Pain Points:

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.

Conclusion:

Page Name : Workflow - Reorder

The screenshot shows a web interface for 'Workflow Rules'. At the top, there are tabs for 'Rules' and 'Usage'. Below the tabs is a heading 'Workflow Rules' with a 'Help' icon. A descriptive paragraph explains that workflow rules allow performing automatic actions on records based on filter criteria. Below the text is a search bar and a row of buttons: 'Save', 'Cancel', '+ Create Rule', and a list icon. A table below lists two rules:

Rule Name	Leads ▾	Execute On	Actions	Last Modified	All Status ▾
sample	Leads	Create	3	Oct 29, 2019	<input checked="" type="checkbox"/>
adfsghj	Leads	Create	1		<input checked="" type="checkbox"/>

Pain Points: When I click the reorder button I have an option to reorder my rules. But why? What is the purpose of having reorder button here? Is this the order system need to validate the rule one by one?

Solution: Need to give some criteria for reorder so that user can choose the order in the criteria rules. In this case if it's not possible means show the purpose of button hint for "reorder button" so that as a user everyone understand the purpose of the reorder button.
And the call to action should be "Done". Instead of save/cancel.

Conclusion:

Page Name : Workflow - Lock Rule

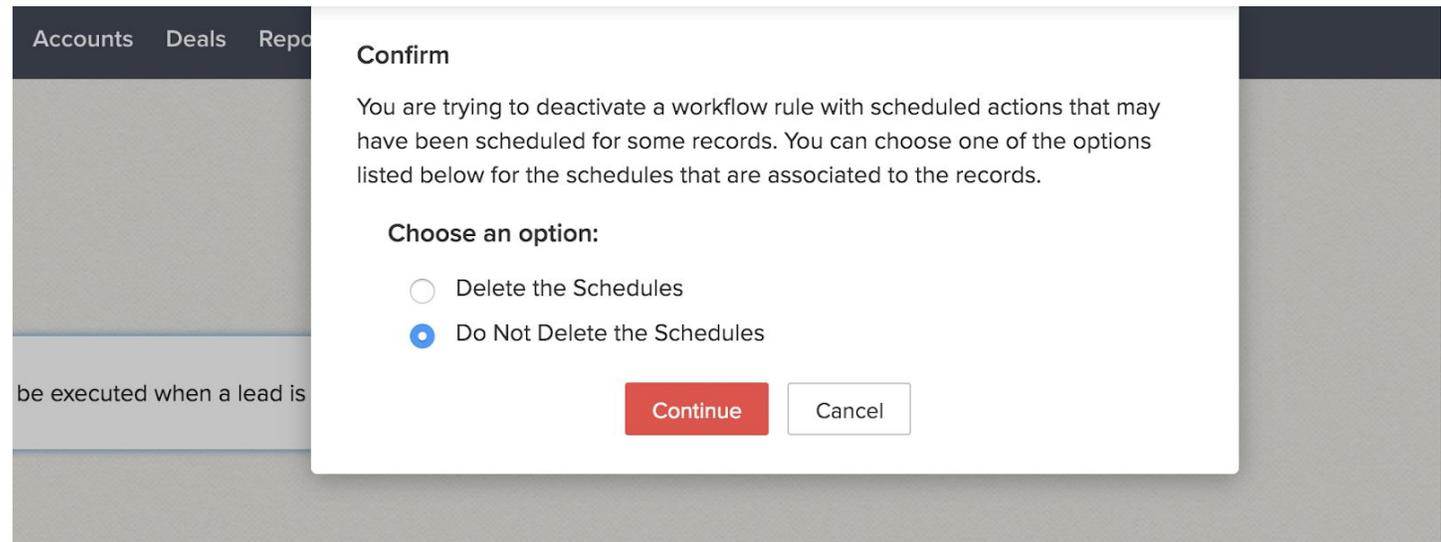
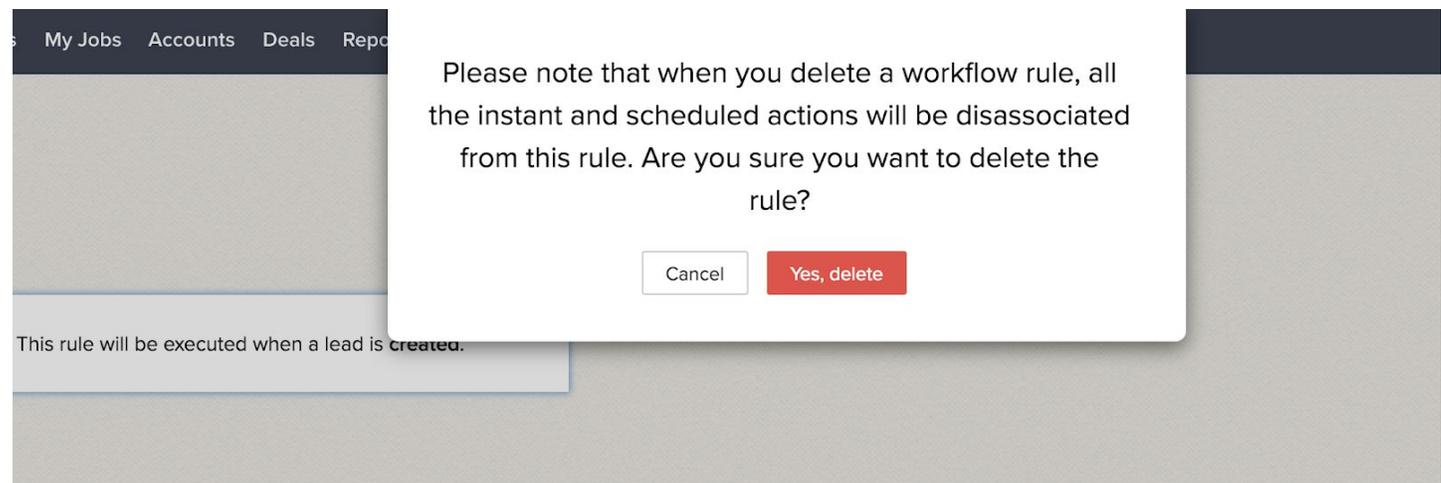
The screenshot shows a 'Lock Rule' dialog box overlaid on a workflow rule configuration page. The dialog box has a title bar with 'Lock Rule' and a close button. The main text inside the dialog says: 'Please explain why you're locking this rule. This will help other administrators understand how changing it will affects your CRM.' Below this text is a large empty text area for input. At the bottom of the dialog are two buttons: 'Lock' (primary action, blue) and 'Cancel' (secondary action, white). The background shows a navigation menu with 'My Jobs', 'Accounts', 'Deals', and 'Reports'. A notification bell icon with a '5' badge is visible in the top right corner of the background page.

Pain Points: Different button alignment.

Solution: Primary action should be right side and the secondary on left side.

Conclusion:

Page Name : Workflow - Alert message

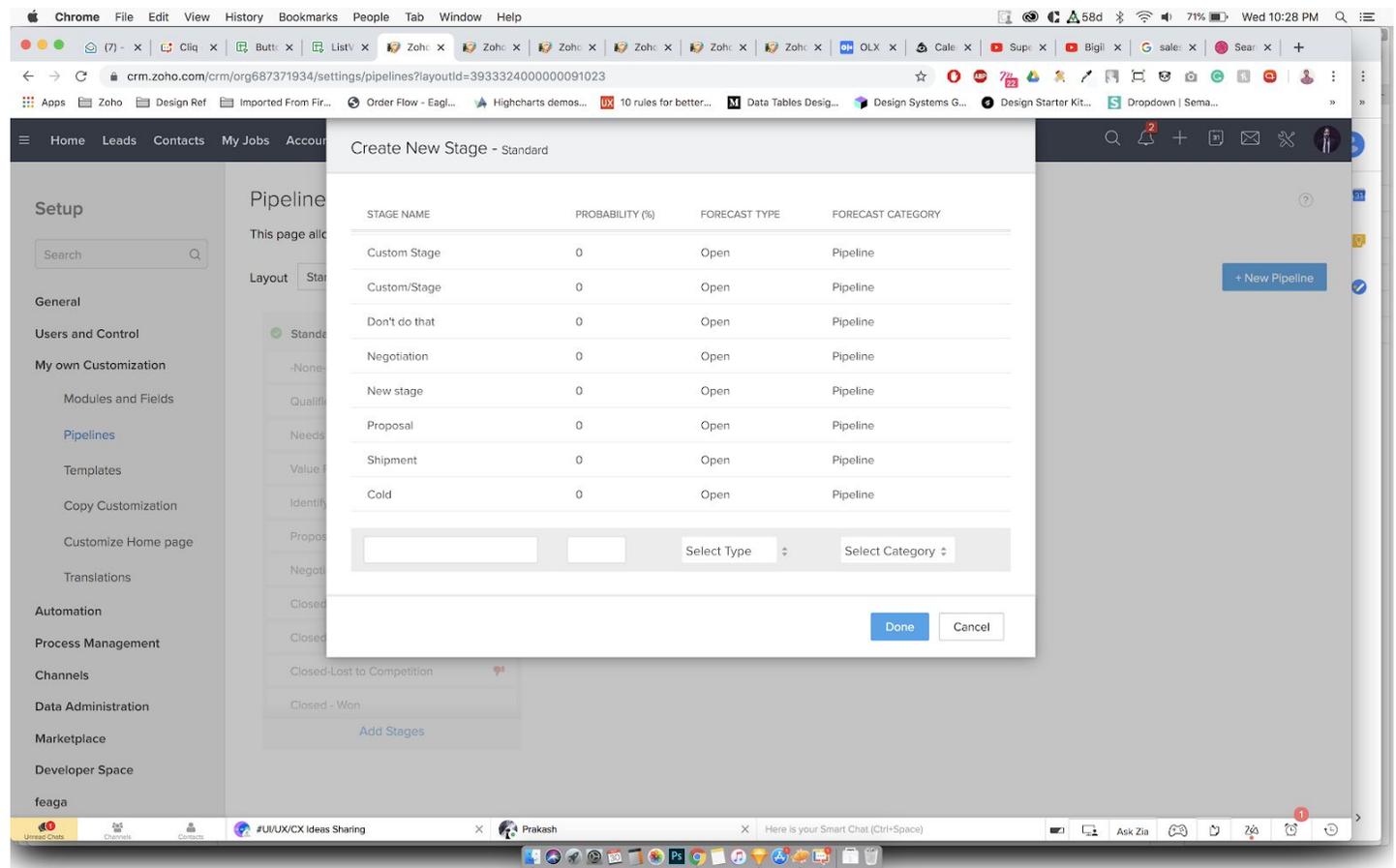


Pain Points: Different style for alert/delete popup.

Solution: Need to follow the same style for all the alert/info messages.

Conclusion:

Page Name : Pipeline - Create New



Pipelines

This page allows you to manage various sales processes by organising the Deal stages in different pipelines.

Layout Standard

[+ New Pipeline](#)

<input checked="" type="checkbox"/> Standard (Standard) 20	<input type="checkbox"/> new one 6
-None-	Qualification
Qualification	Needs Analysis
Needs Analysis	Value Proposition

Pain Points:

1. Button alignment is different.
2. Here the function is creating a new pipeline but we use "+". + explain the add new.

Solution:

1. Need to align the primary on left side and cancel on right side.
2. CTA should be Create New Pipeline.

Conclusion:

Create Pipeline

Pipeline Name

Layout

Stages

Set as Default

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 relevant to this page.

Conclusion:

Page Name : Segmentation

Accounts Deals Reportyt

Add New Label

Enter the label name and its respective recency, frequency and monetary score in numerals or range. Eg: 4,4-5

Label Name

Recency

Frequency

Monetary

Segment Labels	Recency	Frequency
Champion	4-5	4-5
High value customer	1	1
At risk customer	3	1-2
Customer needs attention	2-3	2-3

Accounts Deals Reportyt

Edit

Linking field

Recency field

Frequency field By count By field

Monetary field

Segmented On : **Accounts**

Recency field : **Created Time**

Linking field : **Account Name**

Monetary field : **Sub Total**

Contacts My Jobs Accounts

Add Criteria

1 Created Time is 10/31/2019 01:00 AM

Segmented On

Recency field :

Segmentation

This rule will be executed for all Accounts.

Pain Points: All button alignment is different.

Solution: Need to align the primary button on the right side. And cancel 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:

Page Name : Blueprint

Blueprints Usage

Blueprint

Design and define a process that matches your organizational policy while making sure that your data is streamlined and adhere to your team's work style and method.

Note: * denotes the draft copy of the published blueprint.

Search

Blueprint	All Modules ▾	Layout	Field	Last Modified	All Status ▾
deal	Deals	Standard	Stage	Oct 22, 2019	<input checked="" type="checkbox"/>

Pain Points: We used "+" before create. It gives confusion like its a add/create blueprint.

Solution: Need to remove the "+".

Conclusion:

Page Name : Blueprint - Deactivate

Attention!

There are 3 records associated with this Blueprint.

You can either,

- Continue processing the records with this Blueprint
- Exit all records out of Blueprint with last known state

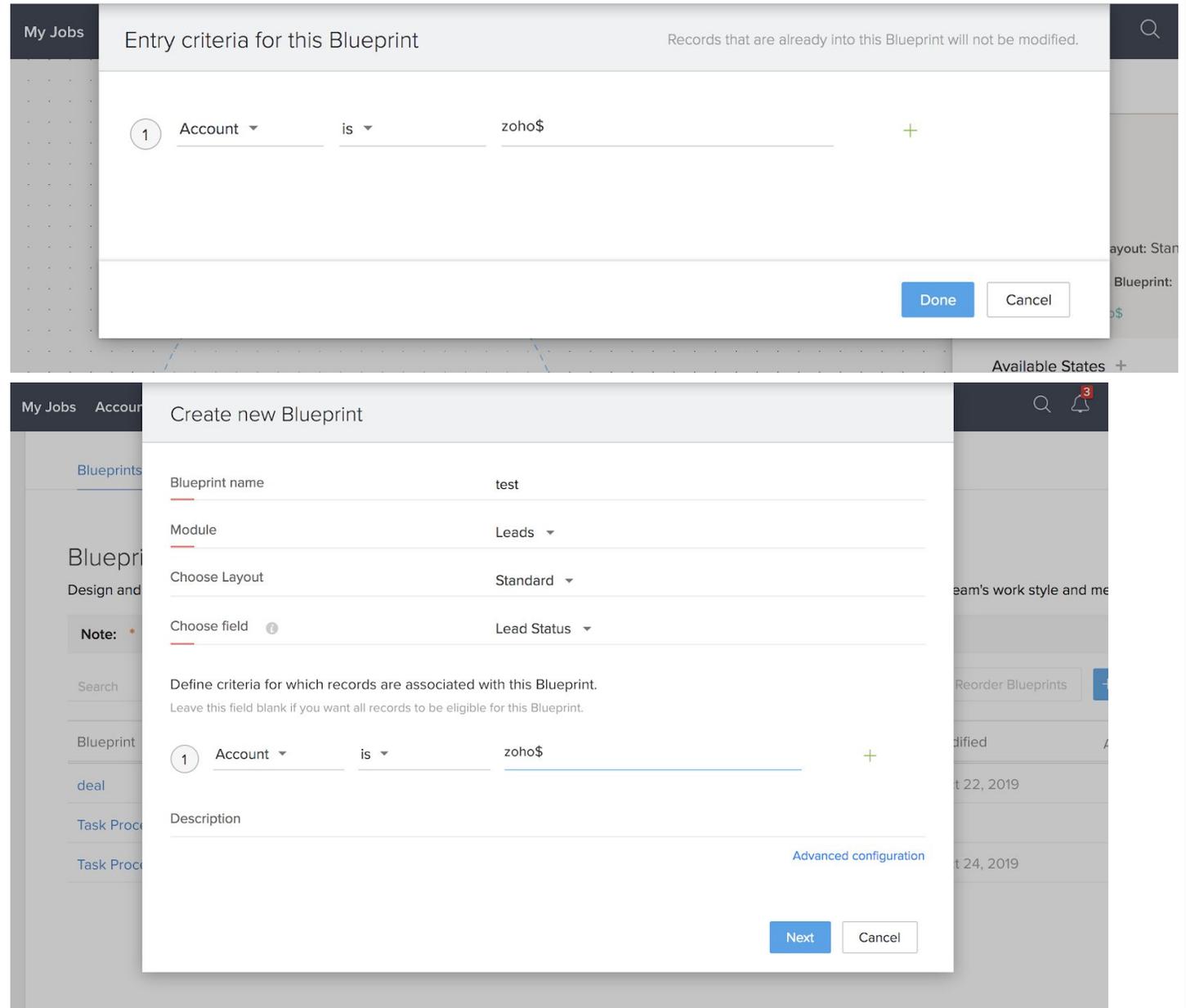
Blueprint	All Modules ▾	Layout	Field	Last Modified
-----------	---------------	--------	-------	---------------

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

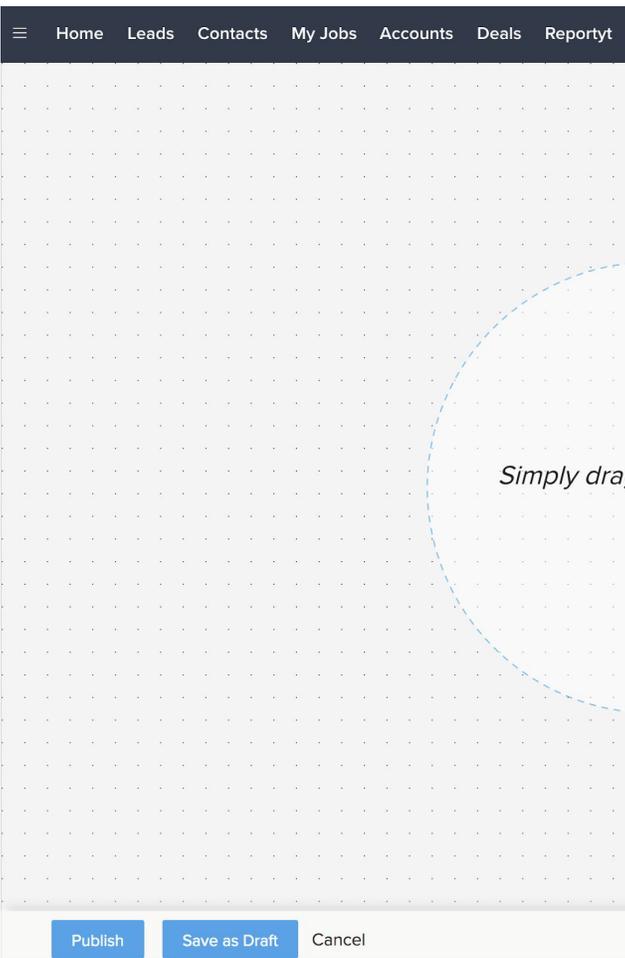


Pain Points: button alignment - When we use the call to actions on the right side need to follow the primary on the right side and the secondary on the left side.

Solution: Need to follow the button alignment

Conclusion:

Page Name : Blueprint



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

The screenshot shows a workflow editor interface. On the left, a vertical flowchart is displayed on a grid background. It starts with a box labeled 'Start (-None-)', followed by a downward arrow with a red plus sign, leading to a box labeled 'Pre-Qualified'. From 'Pre-Qualified', another downward arrow with a red plus sign leads to a box labeled 'Contact in Future'. On the right side of the interface, there is a panel with two tabs: 'Info and States' and 'Transitions'. The 'Transitions' tab is active. Below the tabs, there are two input fields: 'Transition name' and 'Description'. A blue 'Save' button is located at the bottom right of the panel.

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 - Alert message

The screenshot shows an alert message box overlaid on the Blueprint editor. The alert text says: "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." Below the text are two buttons: a blue "Review" button and a red "Save anyway" button. The background shows a blurred view of the Blueprint editor with a "Pre-Qualified" box visible. On the right side, a partial view of the "Info and States" panel is visible, showing the text "test" and a "Continuous" toggle switch.

Pain Points: This alert message 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

Email Recipients

Additional Recipients

Email Template

testing
fsgdfhcdxabc

Common Transition [Include all states](#)

BEFORE DURING AFTER

INSERT MESSAGE AND FIELDS:

Make Notes as mandatory

Make Attachment as mandatory

Pain Points:

1. Used two different alignment buttons in side Nav bar.
2. "+" and "ADD" convey the same message. When I see this first time I got a question "Add What"

Solution:

1. Need to follow the same style in all the places.
2. We can use "Add Action" as CTA literal.

Conclusion:

Page Name : Blueprint - show recipients, Select template

Info and States Transitions

← EMAIL NOTIFICATION Lead [Associate existing](#)

Name

Email Recipients Choose recipients

Additional Recipients

Email Template Select Template

Done Cancel

← EMAIL NOTIFICATION Lead [Associate existing](#)

Name

sample

Email Recipients Show recipients

Additional Recipients

ewrgehg

Email Template Select Template Sfdghn

From vignesh.gnanasekaran@zohocorp....

[Add Reply To](#)

Done Cancel

Pain Points:

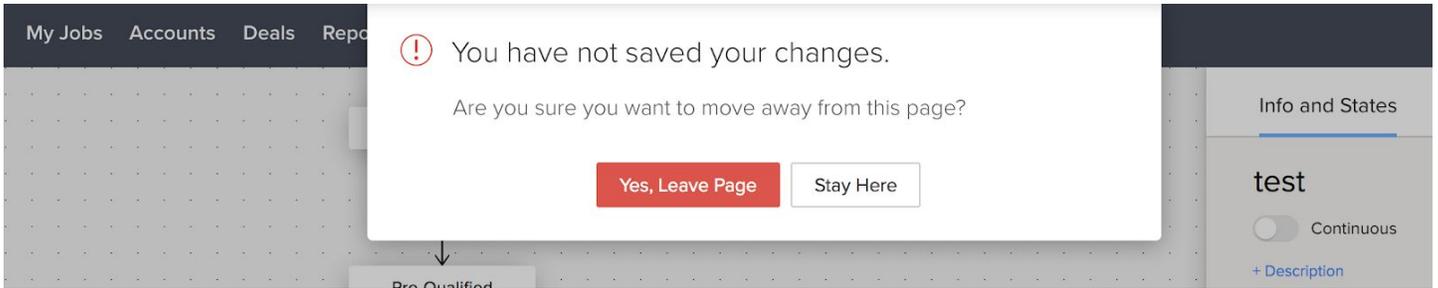
1. Show recipients & Select template not look like a button.
2. When I choose the recipients I don't get any info about recipients. When I select template I got the template name showed here. Two different types of input buttons used here.

Solution:

1. Need to create new button style for this/follow the existing style.
2. Need a consistency in all the input selection buttons. If we showed in a place need to follow in all other places.

Conclusion:

Page Name : Blueprint - Alert Message



Pain Points: Different style for alert/delete popup.

Solution: Need to follow the same style for all the alert/info messages.

Conclusion:

Page Name : Approval Process

Approval Process

Automate the submission of records for approval from one or more managers using approval process.

Reorder Processes + Add Approval Process

PROCESS NAME	MODULE -	EXECUTE ON -	#RULES	STATUS -
City is Chennai_Approve vickey	Leads	Create or Edit	2	<input checked="" type="checkbox"/>
fhgjhkj	Contacts	Create	1	<input checked="" type="checkbox"/>

Pain Points: + & Add used in the beginning. It's actually creating a new one.

Solution: Need to remove "+" and the call to action should be Create approval process.

Conclusion:

Page Name : Approval Process - Create New

New Approval Process

Module	Module ▾
Name	Name
Description	Description //
When to Execute	<input checked="" type="checkbox"/> Record Creation <input type="checkbox"/> Record Edit

[+ Add Rule to this process](#) [Cancel](#)

Pain Points: Title and call to action is different. 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

dfsrezhrttnsmzns dgzksejtnh 2

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 : Approval process - Add Task

Assign Task

qwertyuio

qwertyuio Preview

task assign

+ Create Task

Action(s) upon A

Configure Action After

Update Fields

Pain Points:

1. "+" before Create New.
2. When I click the preview it doesn't work like preview, edit opens in a popup.

Solution:

1. Need to remove "+" and use the Create task alone.
2. There is no need to preview here. Need to change the text as "Edit"

Conclusion:

Page Name : Approval Process - preview

Chrome File Edit View History Bookmarks People Tab Window Help

crm.zoho.com/crm/org687371934/settings/approval-process/create

Home Leads Contacts My

Setup

Search

General

Users and Control

My own Customization

Automation

Process Management

Blueprint

Approval Processes

Review Processes

Orchestration

Channels

Data Administration

Marketplace

Developer Space

feaga

Edit Task - Leads

This task will be automatically assigned to the next approver.

Subject: qwertyuio

Due Date: Record Submission date plus 1 Day(s)

Status: Not Started

Priority: High

Notify Assignee

Remind Assignee

Notification emails will be sent only to active and confirmed users.

Same day as due date at 01:00 AM

Alert Mode: Email Pop-up

Description

Type # to insert merge field

Save and Associate Cancel

Update Fields

Configure Action After Final Approval

Pain Points: Button alignment is different.

Solution: Primary button should be on the right side and the secondary on the left side.

Conclusion:

Page Name : Approval process - Assign Task

Contacts My Assign Task - Leads

Search

+ New Task

Subject	Due Date	Priority	Status	Assigned To
<input checked="" type="checkbox"/> 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

Update Fields

Pain Points:

1. Title and the CTA is different.
2. +New Task for creating a new one.

Solution:

1. The label of CTA should be Assign.
2. For creating a new task the CTA should be Create Task.

Conclusion:

Page Name : Approval process save

On 1st approval vbj

Update Fields Call Webhooks

Done Cancel Save Cancel

Pain Points: Done/cancel comes before save this process. Do we really need this?

Solution: We don't need done/cancel before save/cancel here.

Conclusion:

Page Name : Approval Process - Deactivate Rule

EXECUTE ON -	#RULES	STATUS -
Create	2	<input checked="" type="checkbox"/>
Create	1	<input checked="" type="checkbox"/>
Create or Edit		

Deactivate Rule

Do you want to deactivate this process?

Pain Points: Button alignment is different.

Solution: Need to change the alignment to left side.

Conclusion:

Page Name : Approval Process - Popup

My Assign Task - Leads

Search

Subject	Due Date	Priority	Status	Assigned To
<input checked="" type="checkbox"/> qwertyuio	APRule Trigger Date plus 1 day(s)	High	Not Started	
task assign	APRule Trigger Date plus 22 day(s)	High	Not Started	

My Email Notification - Leads ×

Search + Create Email Notification

Name	Email Template
asdfghj	Red
<input checked="" type="checkbox"/> qwertyj	Red
fesrdfhg	Red
sampledsgrdthfjytkugilolgsdghgfgkjk	Sfdghn

Associate Cancel

Capturing Sales Region

My Call Functions - Leads ×

+ New Function

Name	Description	Language
<input checked="" type="radio"/> Capturing Sales Region	Global sales region is geographically categorized ...	Deluge

Associate Cancel

Not Started

Pain Points: Repeated issues for create new button.

Solution: Some popup has "+New" "+Create" like that.
Need to follow the same button style for creating the "New" from popup. So that everything looks consistent.

Conclusion:

Page Name : Approval Process - Add another rule

sample Module Leads Execute On Create Only ?

[Add Description](#)

[+ Add Another Rule](#)

1

- 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 Cancel [Reorder Rules](#) [+ Add Another Rule](#)

City is Chennai_Approve vickey Module Leads Execute On Create or Edit ?

[Add Description](#)

[Reorder Rules](#) [+ Add Another Rule](#)

1

- 1 Country IS india
- OR
- 2 Annual Revenue = 1000000

Pain Points:

1. Repeated call to actions. Reorder rules and add another rules used at the top and the bottom.

Solution:

1. Need to remove the repeated buttons in the bottom.

Conclusion:

Page Name : Approval Process - delete rule

Imported From Fir... Order Flow - Eagl... Design Systems G...

My Jobs Accounts Deals Reportyt Ana

City is Chennai_Approve vickey

Add Description

1

1 Country IS india Deleted Undo

OR

2 Annual Revenue = 1000000

Vignesh G / Prakash Sekar

Pain Points:

1. Showing the browser popup style gives confusion.
2. When I delete the rule we showed the thumbnail and option to "Undo" the deleted rule.

Solution:

1. This all functions are totally different from other features.
2. We don't follow this style in any other places. If used delete the record it will be deleted and not able to undo the actions.

Conclusion:

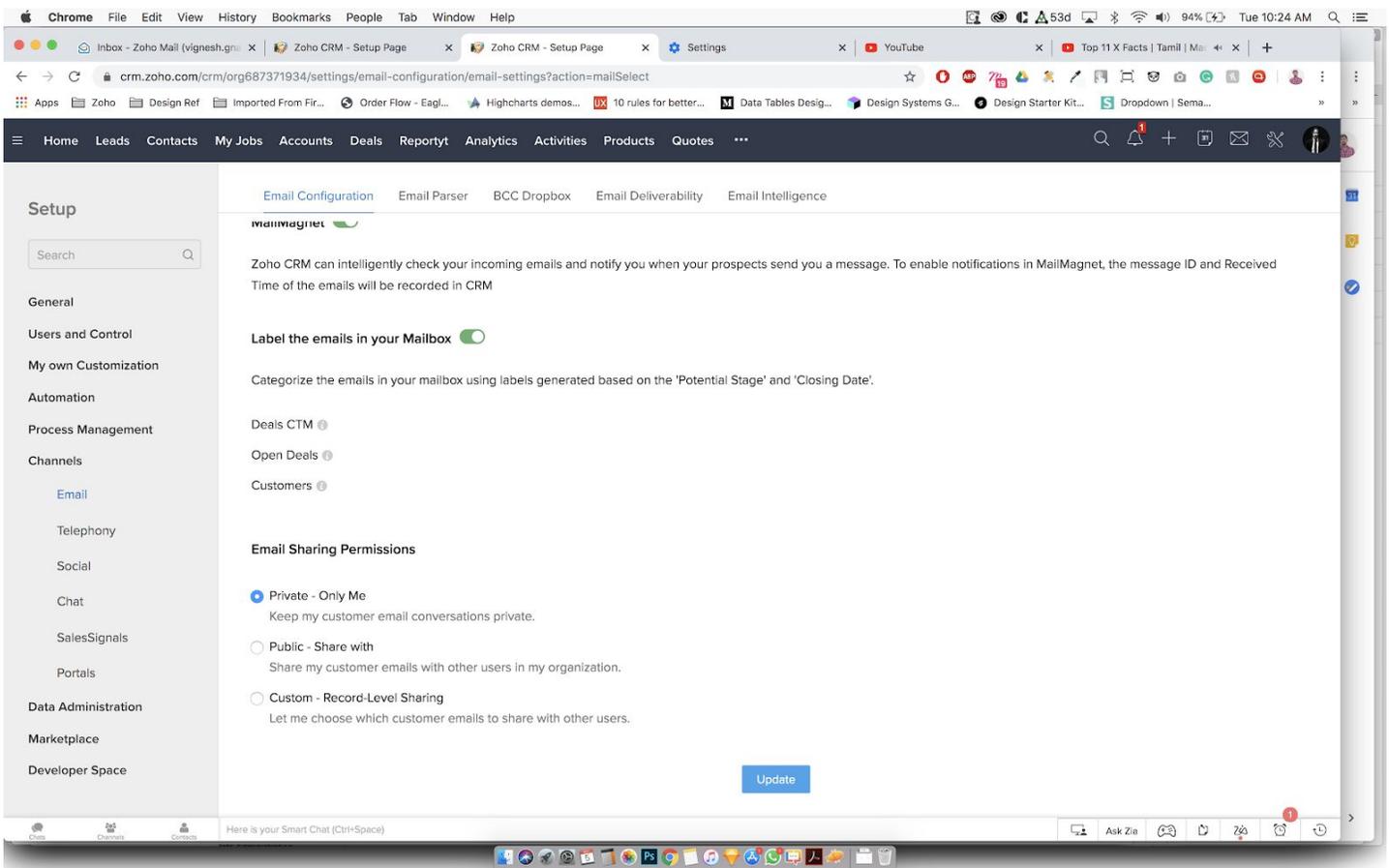
Page Name : Channels - Email configuration

Email Sharing Permissions

- Private - Only Me
Keep my customer email conversations private.
- Public - Share with
Share my customer emails with other users in my organization.
- Custom - Record-Level Sharing
Let me choose which customer emails to share with other users.

Save

Cancel



Pain Points:

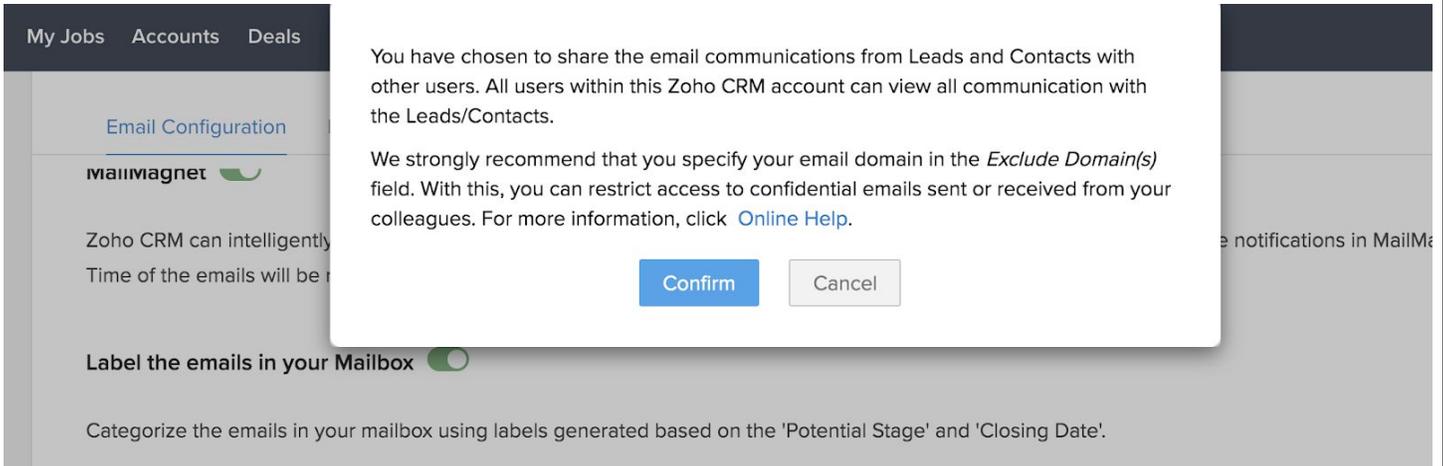
1. Button style and alignment is different while adding a new email ID.
2. Without doing any actions the primary buttons visible at all times gives confusion about what I have changed.

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 disabled by default. It should be enabled once the user changes anything.

Conclusion:

Page Name : Channels - Email configuration public



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 *Exclude Domain(s)* field. With this, you can restrict access to confidential emails sent or received from your colleagues. For more information, click [Online Help](#).

[Confirm](#) [Cancel](#)

Pain Points:

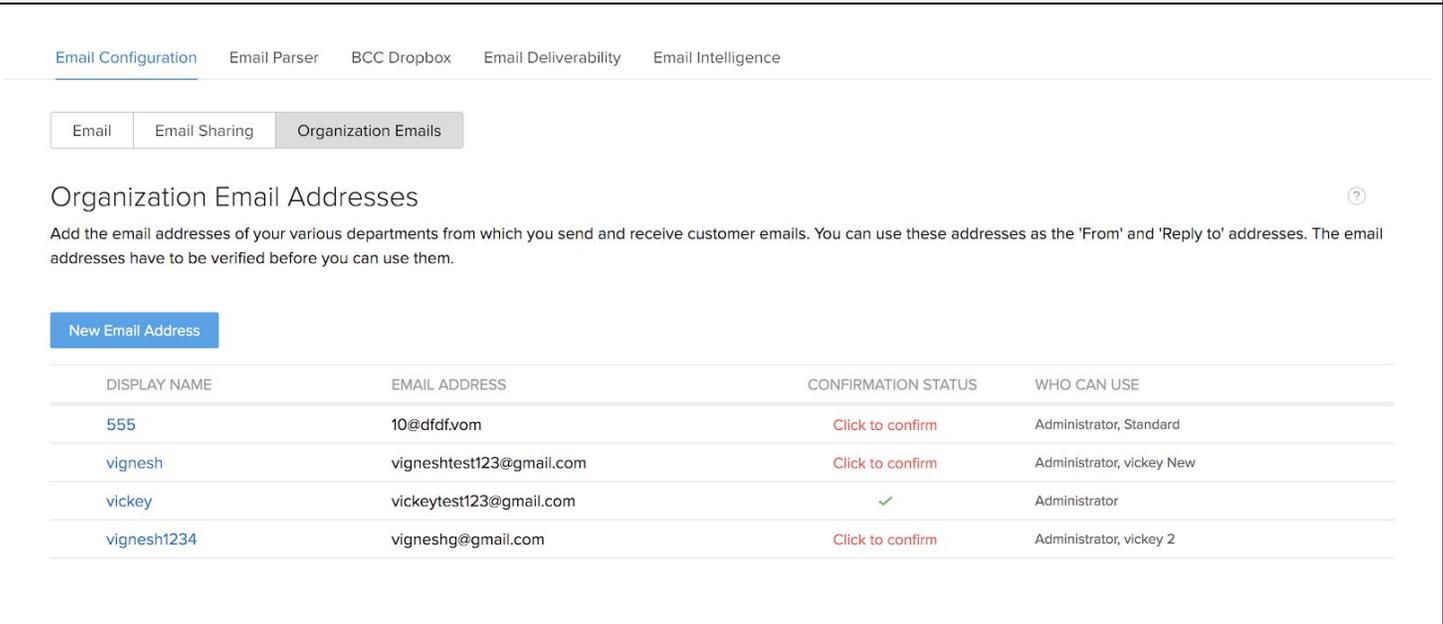
1. When I configure my email private to public I got summary with confirm text. Which is not clear to read. And used the different style for buttons.

Solution:

1. Alert/info needed to follow the similar or same style. Here We need to give the clear info about the purpose of this popup and need to follow the default button style and alignment.

Conclusion:

Page Name : Channels - Email configuration/Organization emails



Organization Email Addresses

Add the email addresses of your various departments from which you send and receive customer emails. You can use these addresses as the 'From' and 'Reply to' addresses. The email addresses have to be verified before you can use them.

[New Email Address](#)

DISPLAY NAME	EMAIL ADDRESS	CONFIRMATION STATUS	WHO CAN USE
555	10@dfdf.vom	Click to confirm	Administrator, Standard
vignesh	vignesh123@gmail.com	Click to confirm	Administrator, vickey New
vickey	vickeytest123@gmail.com	✓	Administrator
vignesh1234	vigneshg@gmail.com	Click to confirm	Administrator, vickey 2

Pain Points: Primary action is placed in different position.

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 parser

Email Configuration [Email Parser](#) BCC Dropbox Email Deliverability Email Intelligence

Email Parser

[? Help](#)

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.

[+ Create your first parser](#)

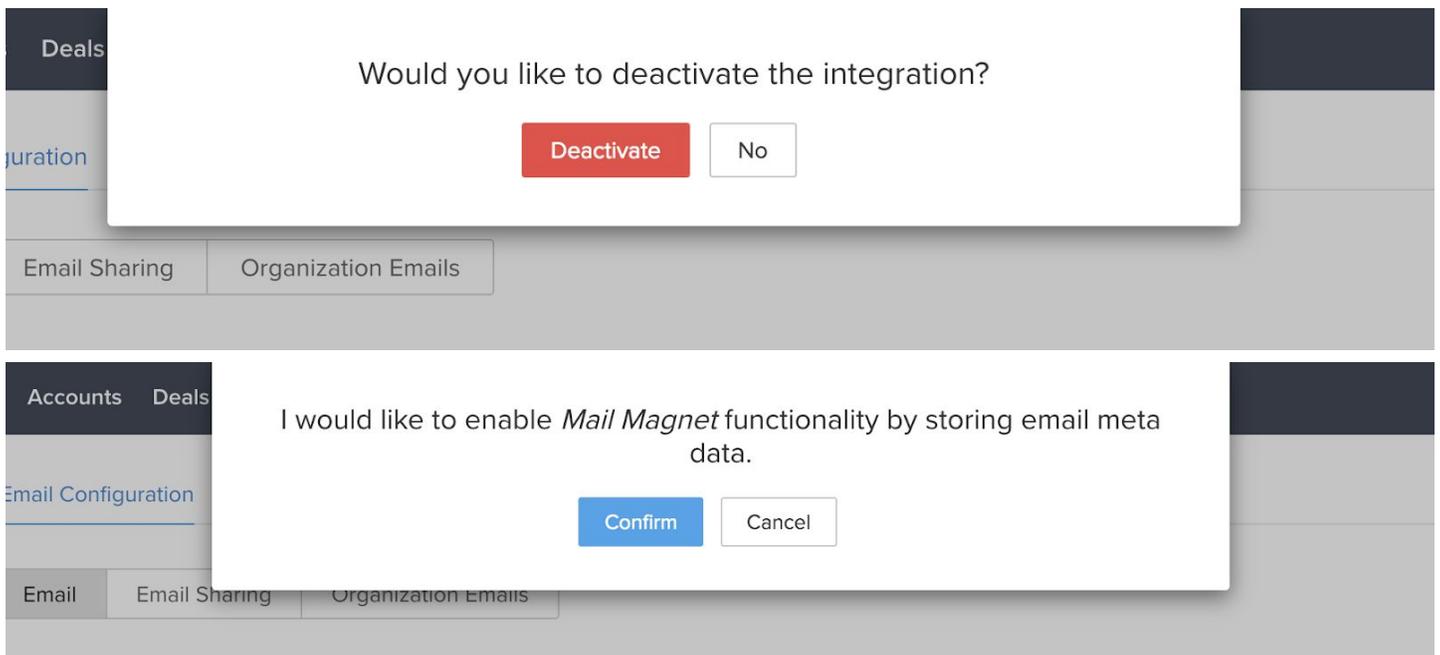
No parsers have been created yet

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



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.
2. 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.

Conclusion:

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

? Help

Send emails from your company's server by setting up relay server(s) and enhance deliverability of bulk emails.

+ New Server

Pain Points:

1. "+" and "Add" conveys the same message.
2. Alignment is different.

Solution:

1. Need to remove "+" and keep the CTA as "Add Domain" "Add New Server"
2. 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:

Page Name : Channels - BCC dropbox

customer record. it's that easy.

BCC Dropbox Email Addresses: [Regenerate](#) [Download as vCard](#)

13e6ugw_bzdjfx@mails3.zohocrm.com

Exclude Domains:

The Search Pattern:

Search the recipients email address in Contacts first followed by search in Leads. If there are no matching records, then create a new Lead and associate the email to it. [Edit Search Pattern](#)

Note:

When associating an email with a contact, CRM will also associate it with their most recent open Deals. If all their Deals are closed, CRM will associate the email with the most recent Won Deals.

List of Approved Email Addresses: ⓘ

vignesh.gnanasekaran@zohocorp.com [+ Add another Email](#)

[Save](#)

Pain Points:

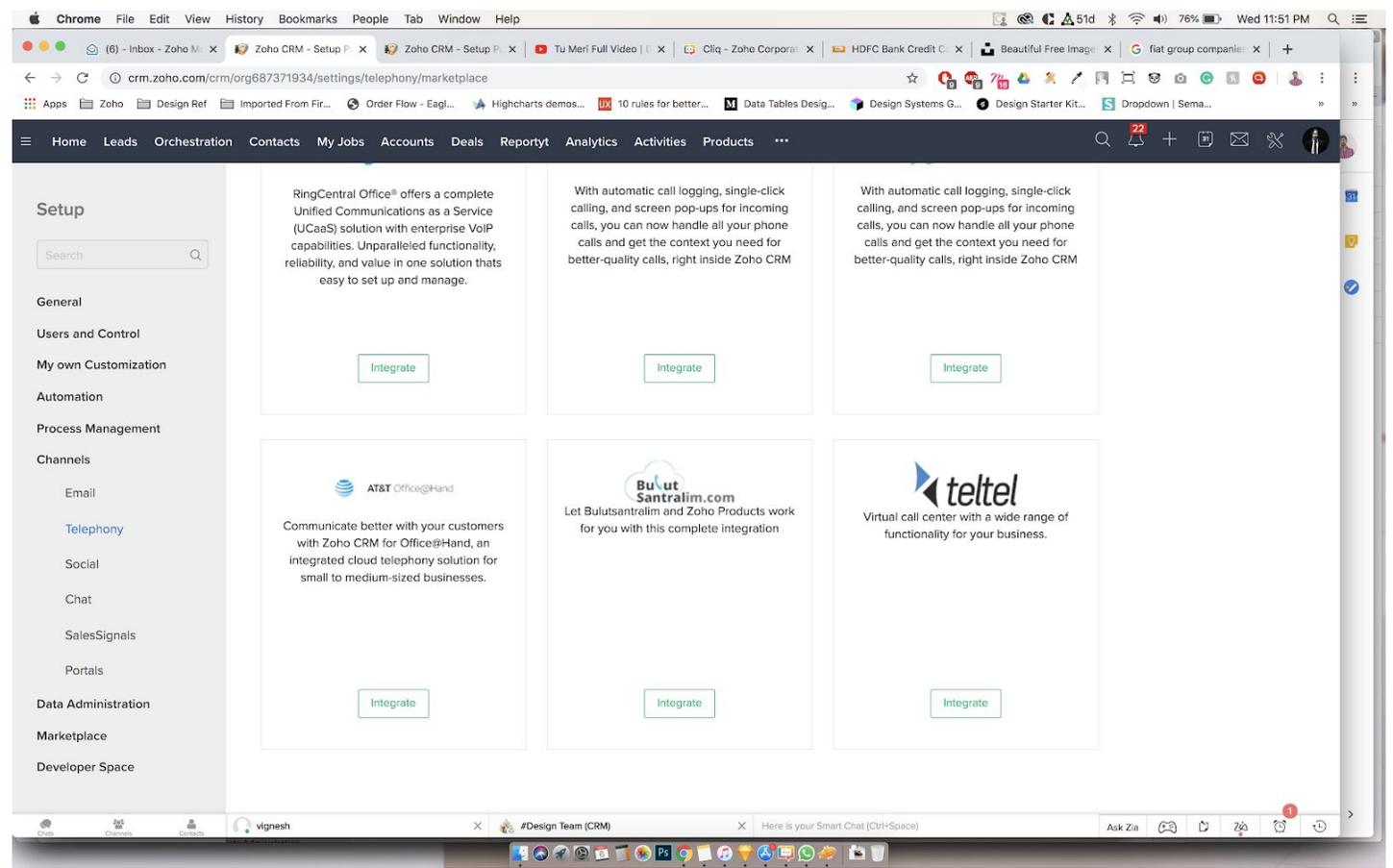
1. Without doing any action button is visible and give us the confusion like it's edited.
2. "+Add another email"

Solution:

1. It should be disable at first time. When if any changes happen it should be enable.
2. We can use "+New email" here.

Conclusion:

Page Name : Channels - Telephony integration

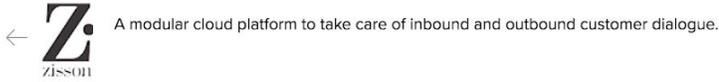


Pain Points: Primary buttons are in different color.

Solution: All the buttons should be primary blue color with fill style.

Conclusion:

Page Name : Telephony



A modular cloud platform to take care of inbound and outbound customer dialogue.

Coming soon

Zisson Wave IP telephony ensures access to cutting-edge telephony for good communication. The solution is implemented as a service and can be scaled up or down according to business size and changing requirements/needs. Low investment costs, short implementation time and limited use of internal resources helps businesses to develop and change with less constraints



TELUS Business Connect

Integrate Zoho CRM with a cloud-based business phone system designed for small businesses.

Enable

With automatic call logging, single-click calling, and screen pop-ups for incoming calls, you can now handle all your phone calls and get the context you need for better-quality calls, right inside Zoho CRM.

Contact

[Telus Technical Support](#)



SAN SOFTWARES
A COMPLETE SOLUTION

SanIPPBX

Get it now

Zoho PhoneBridge features allows any telephony server to make connections with Zoho CRM. It allows you to interact with Zoho CRM and to maintain Inbound, Outbound call details and Click to Dial facility that helps Zoho users to call any of their records and contact person from their Zoho CRM only.

Contact

[Technical Support](#)



Bulutsantralim

Bulutsantralim.com is telephony softswitch from Verimor Telekom in Turkey

Get it now

With Bulutsantralim integration you can start, hold, mute or close your calls using Zoho Products. You can see customer names in inbound calls, schedule calls, list successful or missed calls, listen to call recordings and get detailed call reports all within Zoho Products.

Contact

[Technical Support](#)



BT Cloud Phone

Integrate Zoho CRM with a cloud-based business phone system designed for small businesses.

Enable

With automatic call logging, single-click calling, and screen pop-ups for incoming calls, you can now handle all your phone calls and get the context you need for better-quality calls, right inside Zoho CRM.

Contact

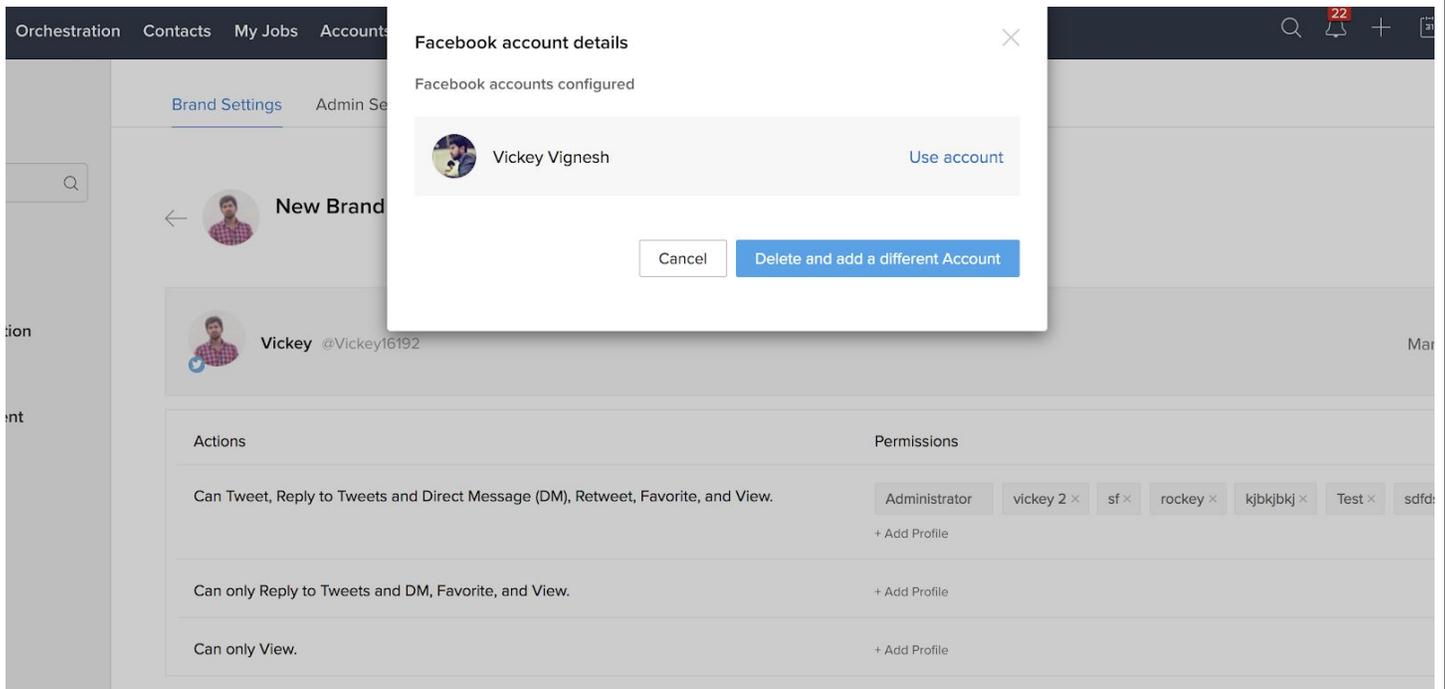
[BT Cloud Phone Technical Support](#)

Pain Points: Different color for primary actions with different messages.

Solution: We should change the buttons as primary blue with common action name like "Enable" so that all looks consistent.

Conclusion:

Page Name : Social - Branding



Pain Points: This is totally a different approach for adding the account. This popup comes once I logged into my account and unfortunately not mapped my page. Again I'm clicking the add account it comes. It suggest me to delete my account and add a different account.

Solution: Add Account/Use account is relevant to this action and it should be Primary here. Delete should not come as a primary and it will be an option to be shown nearby profile.

Conclusion:

Page Name : Social - Branding

[Brand Settings](#) [Admin Settings](#) [Automate Lead Generation](#)

Import Brands from Zoho Social

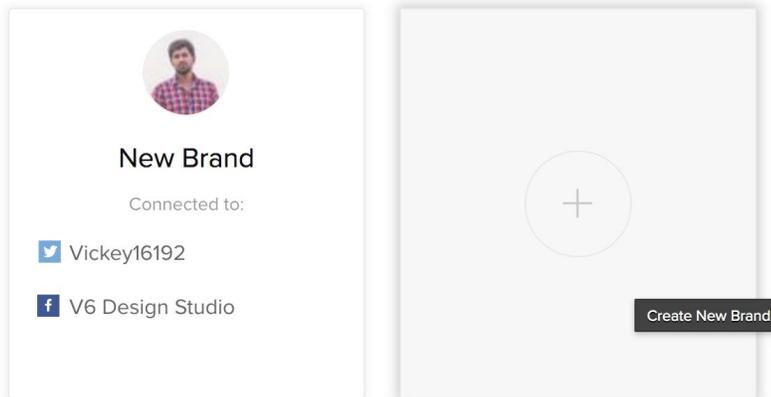
1 Brand selected. [Clear all](#) [Import](#)

NOTE: You are importing brands from donbosco.



[Brand Settings](#) [Admin Settings](#) [Automate Lead Generation](#)

Brands



New Brand

Connected to:

- Vickey16192
- V6 Design Studio

Create New Brand

NOTE: This account is synced with donbosco in Zoho Social.

Pain Points:

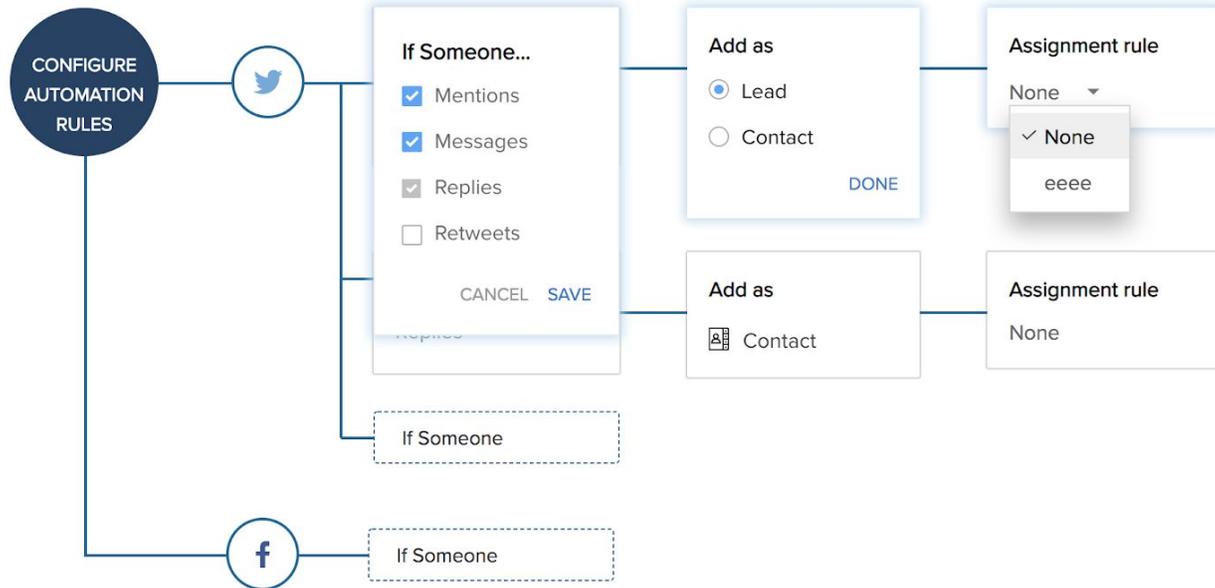
1. For import the brand I have to select the brand and then I have to import. Do we really need this import for the first time?
2. Once I add my social media it will be visible in a card and the "create new brand" is in a different style.

Solution:

1. No need of import for the first time, We have to place the import on the brand card/we have to place the button for Create New brand as common.
2. Create New brand should be common. We have to follow the button style on the right corner.

Conclusion:

Page Name : Social - Automate lead generation



Pain Points:

1. We have two different approach here, we have (cancel,save) and then (done) to save the actions.

Solution:

1. Have to follow one style for all the places. Here we don't have common save for this configuration so need to follow the "Save/Cancel" in all the places instead of done. And need to follow the left alignment.

Conclusion:

Page Name : Social - Admin settings

 **Vickey** @Vickey16192 Manage ^ 

Actions	Permissions
Can Tweet, Reply to Tweets and Direct Message (DM), Retweet, Favorite, and View.	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 Lead Generation

Social Permissions

Social Admin: Administrator vickey 2 × sf × rockey × kjbkjbkj × Test ×
sdfds × [+ Add Profile](#)

Social Tab: Administrator Standard × sf × vickey New × rockey ×
kjbkjbkj × Test × [+ Add Profile](#)

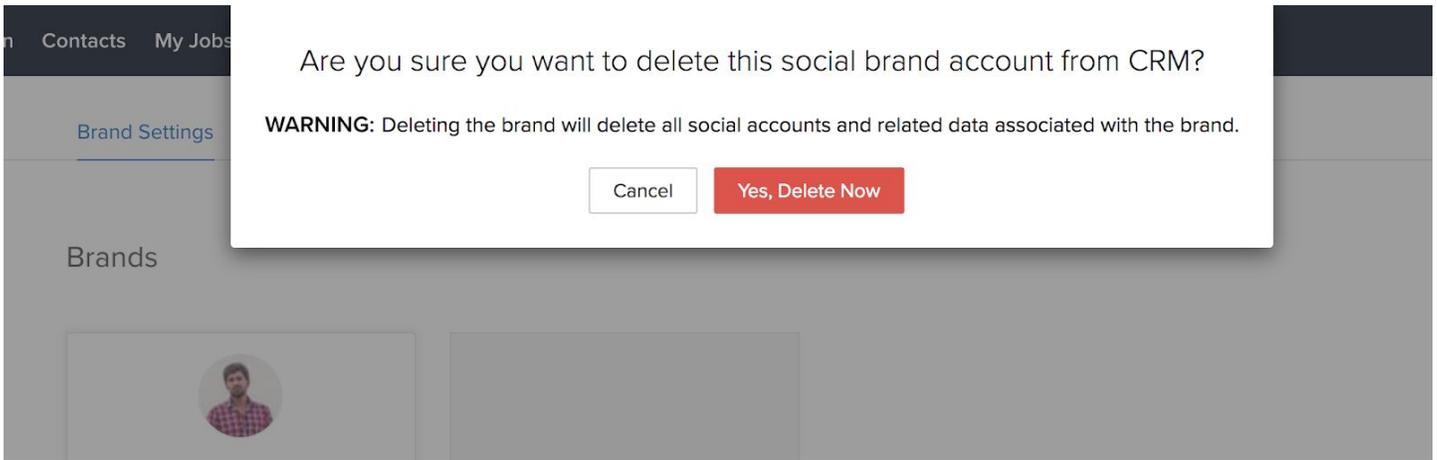
Social Profiles: Administrator Standard × vickey 2 × sf × vickey New ×
rockey × [+ Add Profile](#)

Pain Points: "+Add Profile used in all the places.

Solution: Need to remove "+" and make the add profile as clickable so that user can easily understand its clickable.

Conclusion:

Page Name : Social - Brand

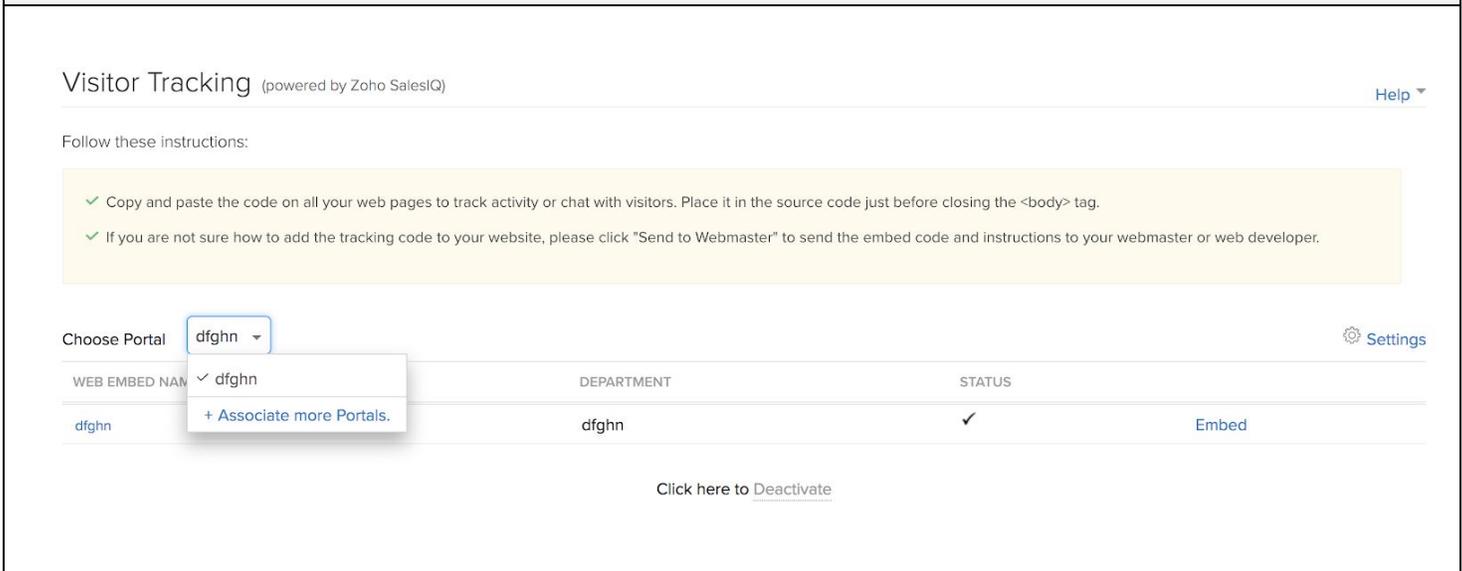


Pain Points: Used different popup style here.

Solution: Need to follow the similar style for delete/alert popup.

Conclusion:

Page Name : Chat

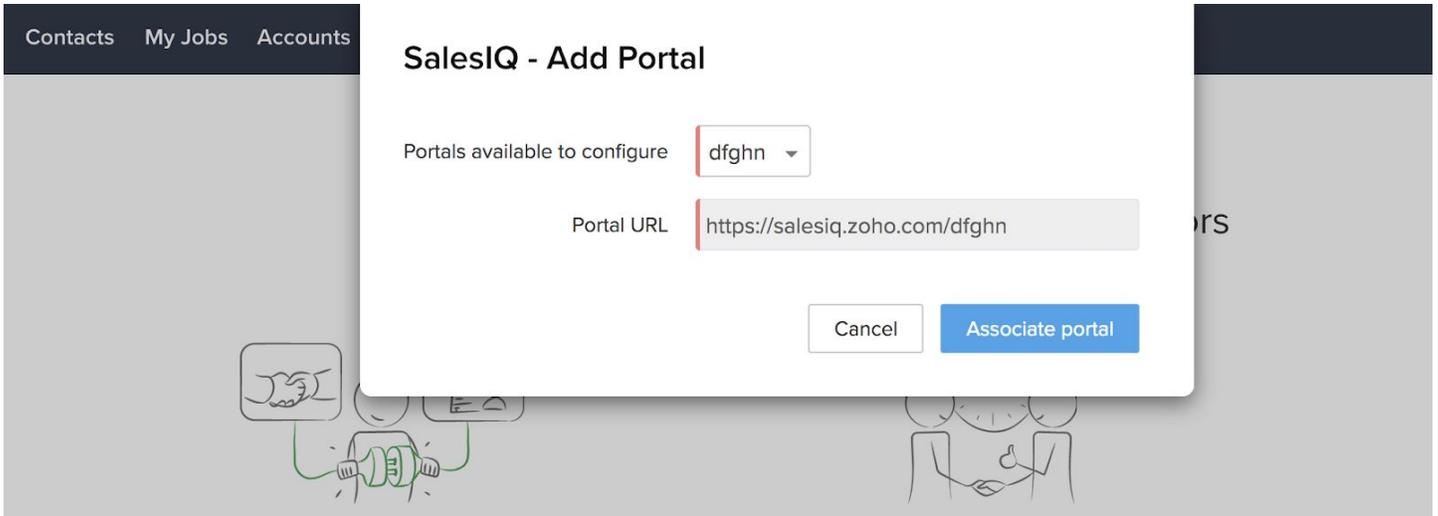


Pain Points: "+ Associate more portals" Here I'm actually Associate new portal but used the "+" gives different meaning.

Solution: Need to remove the "+" from the beginning.

Conclusion:

Page Name : Chat - Integration

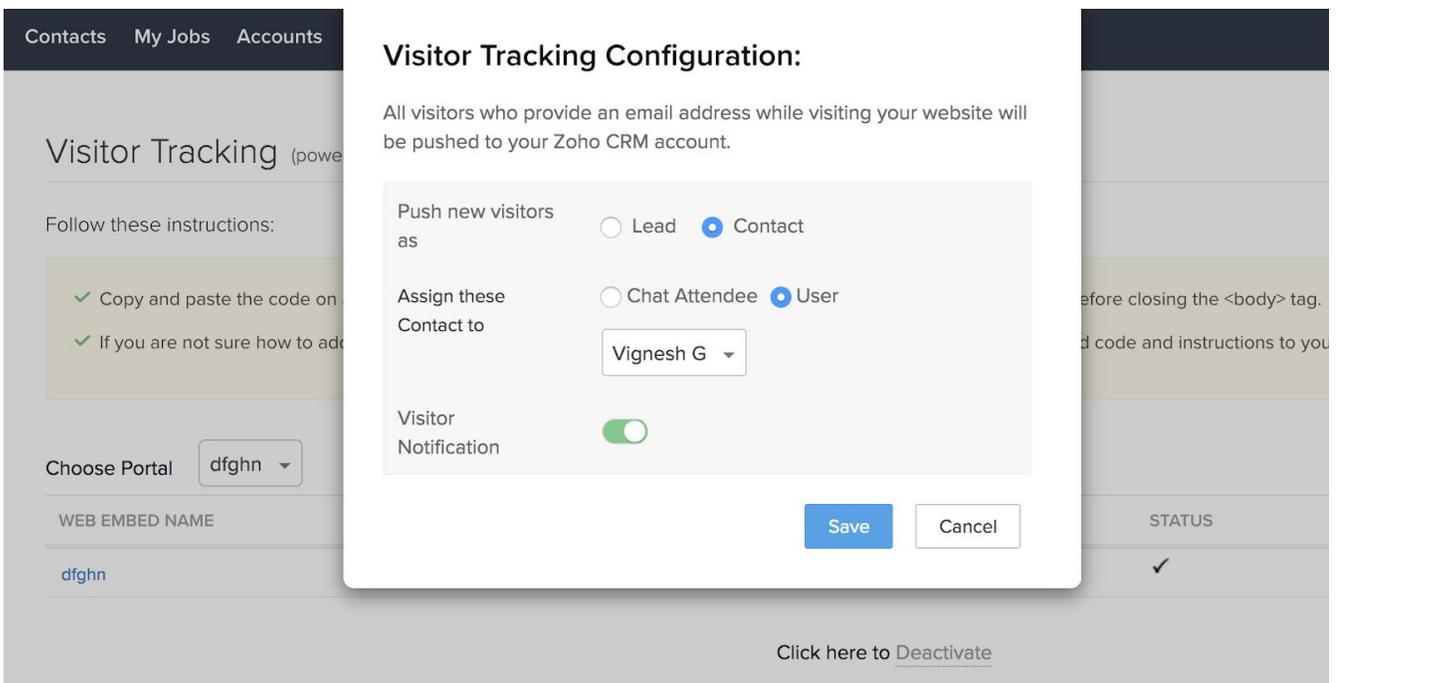


Pain Points: Here the title and the description is different. Are we adding the portal or associate the portal?

Solution: Need to follow the same literal for title or the button. Here we have existing portal so the title should be associate portal.

Conclusion:

Page Name : Chat - Visitor Tracking



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 Tracking

Visitor Tracking (powered by Zoho SalesIQ) Help ▾

Follow these instructions:

- ✓ Copy and paste the code on all your web pages to track activity or chat with visitors. Place it in the source code just before closing the <body> tag.
- ✓ If you are not sure how to add the tracking code to your website, please click "Send to Webmaster" to send the embed code and instructions to your webmaster or web developer.

Choose Portal dfghn ▾ Settings

WEB EMBED NAME	DEPARTMENT	STATUS	
dfghn	dfghn	✓	Embed

[Click here to Deactivate](#)

Deactivate

You are about to deactivate Zoho CRM's Visitor Tracking integration.

The following changes will take place:

1. The 'Visit Summary' fields will be removed from the Lead and Contact Details pages.
2. Live visitor notifications will be disabled.
3. New visitor information will not be pushed to Zoho CRM.

Are you sure you want to deactivate this integration?

Yes, Deactivate Cancel

[Click here to Deactivate](#)

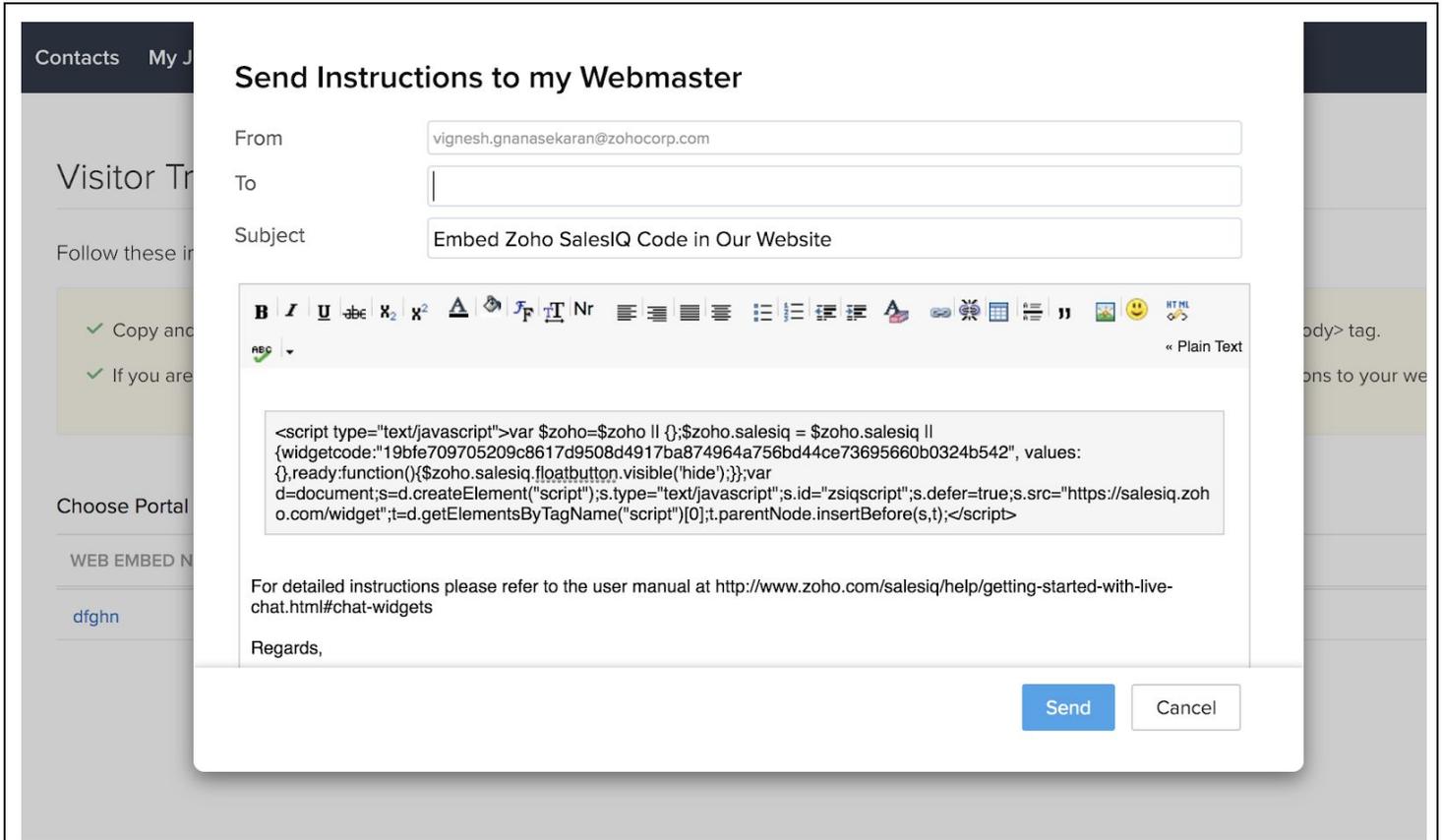
Pain Points:

1. For deactivate the integration we used switch button in all the places. Here we use the different style.
2. Button alignment is different.

Solution:

1. Need to follow the same style for activate/deactivate action.
2. Button alignment should be left side.

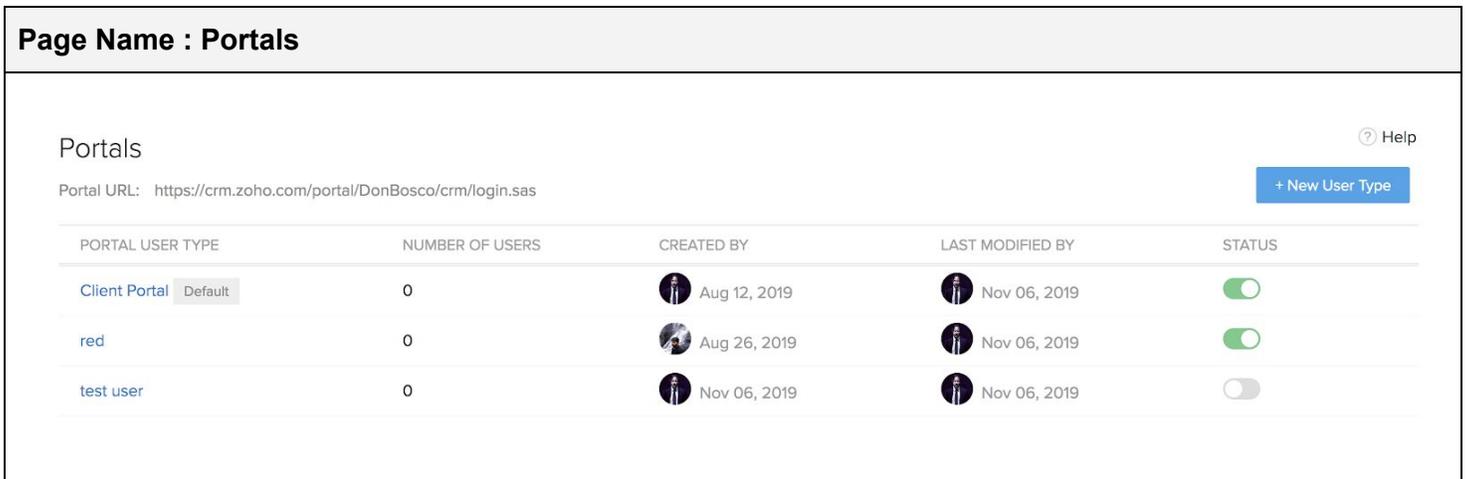
Conclusion:



Pain Points: Button alignment is different.

Solution: Primary should be on the right side and the cancel should be on the left side.

Conclusion:



Pain Points: "+" added before primary call to action. And the CTA name should be relevant to the action.

Solution: Button should be "Create Portal User".

Conclusion:

Page Name : Portals - User Type

Portals

[? Help](#)

[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

Example: Partner, Vendor, Reseller, Distributor, etc.

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
<input checked="" type="checkbox"/> Contacts	Standard ▾	View ▾	Default List View ▾	-
<input checked="" type="checkbox"/> Deals	Standard, Locker ▾	View ▾	Default List View ▾	Contact Name
<input checked="" type="checkbox"/> Products	Standard ▾	View ▾	Default List View ▾	-
<input checked="" type="checkbox"/> Quotes	Standard ▾	View ▾	Default List View ▾	Contact Name
<input checked="" type="checkbox"/> Sales Orders	Standard ▾	View ▾	Default List View ▾	Contact Name
<input checked="" type="checkbox"/> Purchase Orders	Standard ▾	View ▾	Default List View ▾	Contact Name

Next

Back

Pain Points: Button alignment is different.

Solution: Need to follow the right alignment for the call to actions.

Conclusion:

Page Name : Portal - Configuration

Standard

Product Information

Product Owner

Product Name*

Product Code

Product Active

Manufacturer

Multi-Select

Save and Next

Finish

Pain Points: Two primary buttons are placed in the same place.

Solution: Here the user need to configure each and every tabs so we don't need finish button for all the pages. We can keep the "Next" for moving from one page to another page and in the last page we have "Finish" button alone as primary.

In edit mode we need to give "save changes" button instead of these two primary buttons.

Conclusion:

Page Name : Portal - user portal

← partner

[? Help](#)
[Portal Preview](#)

Module for which partner is created : **Contacts**

Portal Tab Configuration [Edit](#)

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](#)

Pain Points: Primary action is missing and there is no data in field permission then what is the purpose of having it separately and having edit button here?

Solution:

1. Portal preview is the primary action here.
2. Do we really need this list view? We have two list view here. Instead of showing the title only we can keep both in a single edit.

Conclusion:

Page Name : Portal - Alert Popup

The screenshot shows the Zoho CRM 'Field Permissions' settings page for the 'Client Portal' user type. A modal alert popup is displayed in the center of the screen, containing the following text: 'You have not saved your changes. Are you sure you want to move away from this page?'. Below the text are two buttons: 'Yes, Leave Page' (highlighted in red) and 'Stay Here'. The background settings page shows various fields like 'Contact Image', 'Record Image', 'Contact Information', 'Lead Source', 'Pick List', 'Last Name', 'Contact Owner', and 'First Name' with checkboxes and dropdown menus. The browser's address bar shows the URL 'crm.zoho.com/crm/org687371934/settings/client-portal'.

Portals

Portal User Type disabled successfully. ✕

Portal URL: <https://crm.zoho.com/portal/DonBosco/crm/login.sas>

PORTAL USER TYPE	NUMBER OF USERS	CREATED BY	LAST MODIFIED BY	STATUS
Client Portal Default	1	Aug 12, 2019	Nov 21, 2019	<input checked="" type="checkbox"/>
red	0	Aug 26, 2019	Nov 06, 2019	<input checked="" type="checkbox"/>
fesgr	0	Nov 06, 2019	Nov 06, 2019	<input checked="" type="checkbox"/>
partner	0	Nov 21, 2019	Nov 21, 2019	<input type="checkbox"/>
retyugi	0	Nov 21, 2019	Nov 21, 2019	<input type="checkbox"/>

Pain Points:

1. Alert popup is used in different positions.
2. For deactivation there is no confirmation before disable the portal.

Solution: Need to follow the similar style for alert/info style.

Conclusion:

← 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 ...

← Ms. Shannon Price

Chennai ghjuhiubui +

Contact Owner Sam Maxwell

Email balademoeter@yahoo.com

Home Phone -

Mobile 123893

Department -

Territories Assign

Send Portal Invitation

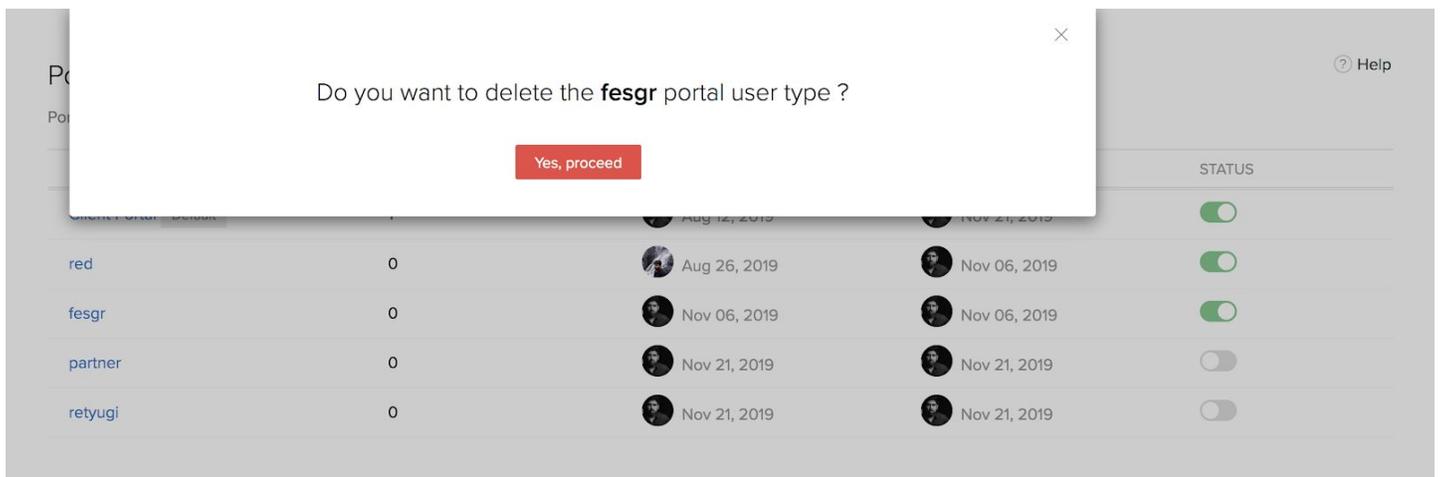
- Clone
- Share
- Delete
- Print Preview
- Find and Merge Duplicates
- Mail Merge
- Meet Now!
- Schedule Online Meeting
- Send Portal Invitation
- Run Macro
- Customize Business Card

Pain Points: We may not invite the user to the portal in configuration area. Instead of that we need to invite the user from detail page more option. And there is no bulk invite to the portal.

Solution: We need an option to invite the user to the particular portal. So we need that insite of particular portal.

Conclusion:

Page Name : Portal - Delete Portal



Pain Points: Delete popup style is different than other styles.

Solution: Need to follow the similar style for alert/delete popup.

Conclusion:

Page Name : Data Administration - Import

Drag and drop the files you've exported from Source System here

- OR -

[Browse Files](#)

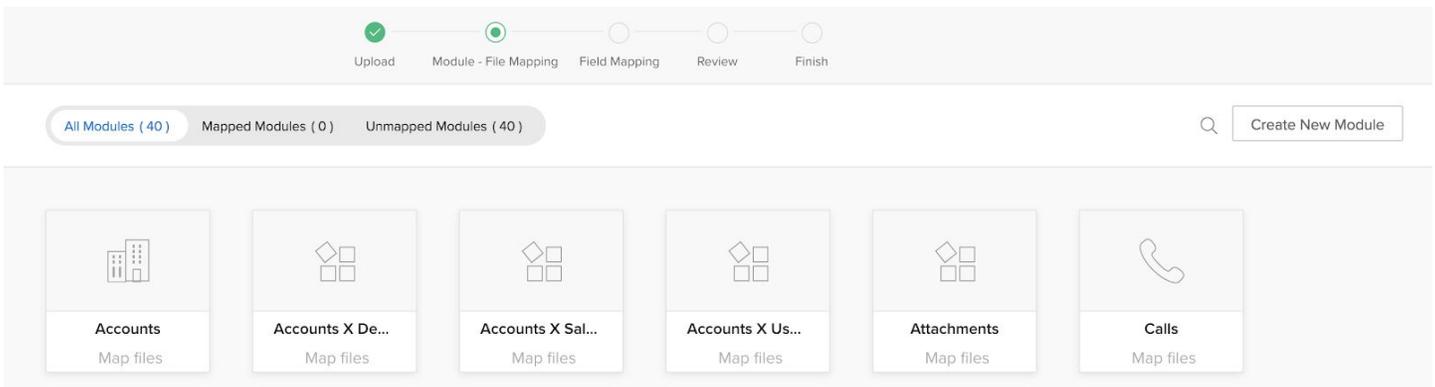
Only csv files are supported

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:

Page Name : Data Administration - Import

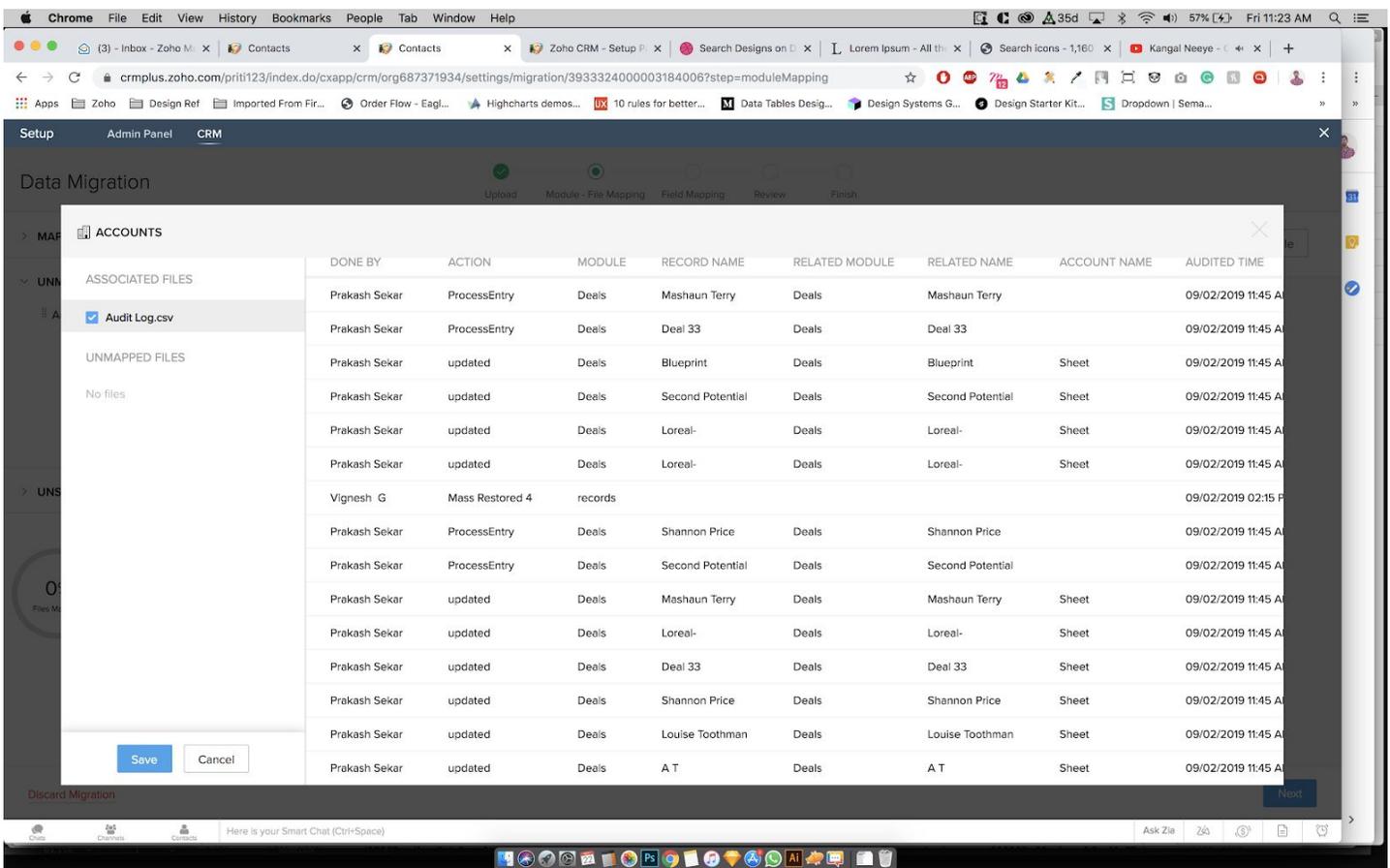


Pain Points: This is not look like a button.

Solution: Need to follow the secondary button style.

Conclusion:

Page Name : Data Administration - Import



Pain Points: Action button is placed in a different position.

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

Conclusion:

Page Name : Data Administration - Import

The screenshot shows a progress bar with five steps: Upload (checked), Module - File Mapping (checked), Field Mapping (active), Review (unchecked), and Finish (unchecked). Below the progress bar, there are tabs for 'Fields Mapping' and 'Assign Default Value'. Under 'Fields Mapping', there are sub-tabs for 'All Fields', 'Mapped Fields (1)', and 'Unmapped Fields (7)', along with a '+ Create New Fields' button. A table below shows the mapping of fields from a file to Zoho CRM fields. The table has three columns: 'FIELDS IN FILE', 'FIELDS IN ZOHO CRM', and 'SAMPLE DATA FROM FILE'. The first row shows 'Done By' mapped to 'Select Field To Import' with sample data 'Prakash Sekar'. The second row shows 'Action' mapped to 'Select Field To Import' with sample data 'ProcessEntry'.

FIELDS IN FILE	FIELDS IN ZOHO CRM	SAMPLE DATA FROM FILE	
Done By	Select Field To Import	Prakash Sekar	Prakash Sekar
Action	Select Field To Import	ProcessEntry	ProcessEntry

Pain Points: There is no purpose of having “+” in the button.

Solution: Need to remove the “+” button.

Conclusion:

Page Name : Data Administration - Import

The screenshot shows three call-to-action buttons: 'Discard Migration' (red text, underlined), 'Reset Mapping' (red text, underlined), and 'Auto Map' (blue text, underlined). The buttons are arranged horizontally and are styled as links rather than buttons.

Pain Points: This is totally a different style for call to actions. And both positive and negative actions are placed 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.gnanasekaran@zoho.com once it is complete.

Apply Auto Mapping

When you apply auto mapping, the remaining unmapped fields will be mapped with the matching fields in the file.

Cancel

Apply

+ Create New

Fields Mapping

Assign Def

All Fields

Mapped Fields (1)

FIELDS IN FILE

FIELDS IN ZOHO CRM 1

SAMPLE DATA FROM FILE

Done By

Select Field To Import

Prakash Sekar

Prakash Sekar

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 Mapping

Assign D

All Fields

Mapped Fields (1)

FIELDS IN FILE

FIELDS IN ZOHO CRM 1

SAMPLE DATA FROM FILE

Done By

Select Field To Import

Prakash Sekar

Prakash Sekar

Reset Field Mapping

By resetting the field mappings, you will override the current settings.

Cancel

Reset

+ Create New

Fields Mapping

Assign Def

All Fields

Mapped Fields (1)

FIELDS IN FILE

FIELDS IN ZOHO CRM 1

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.

Solution: Need to follow the similar style for alert/delete/info popup.

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

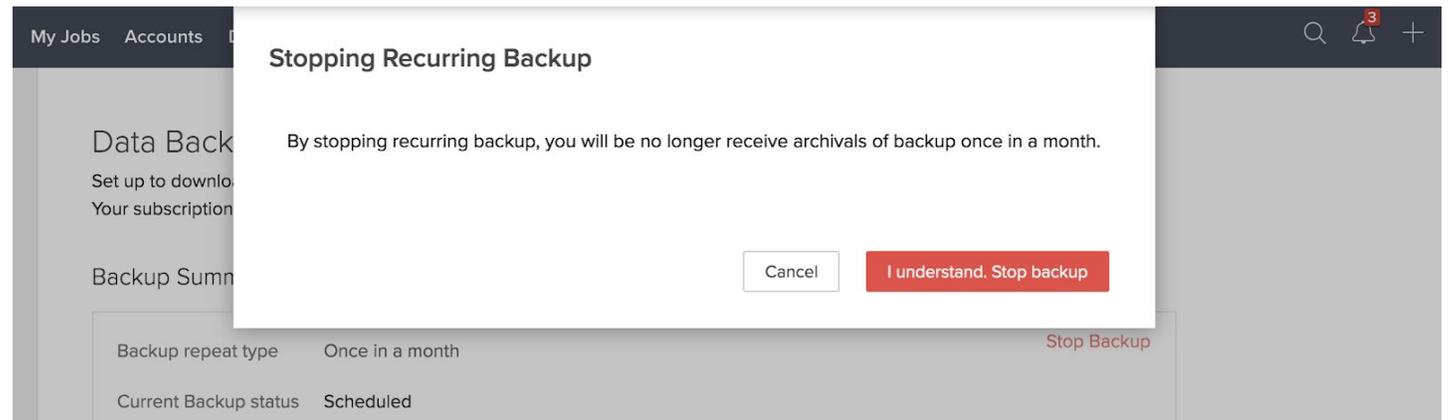
Cancel

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

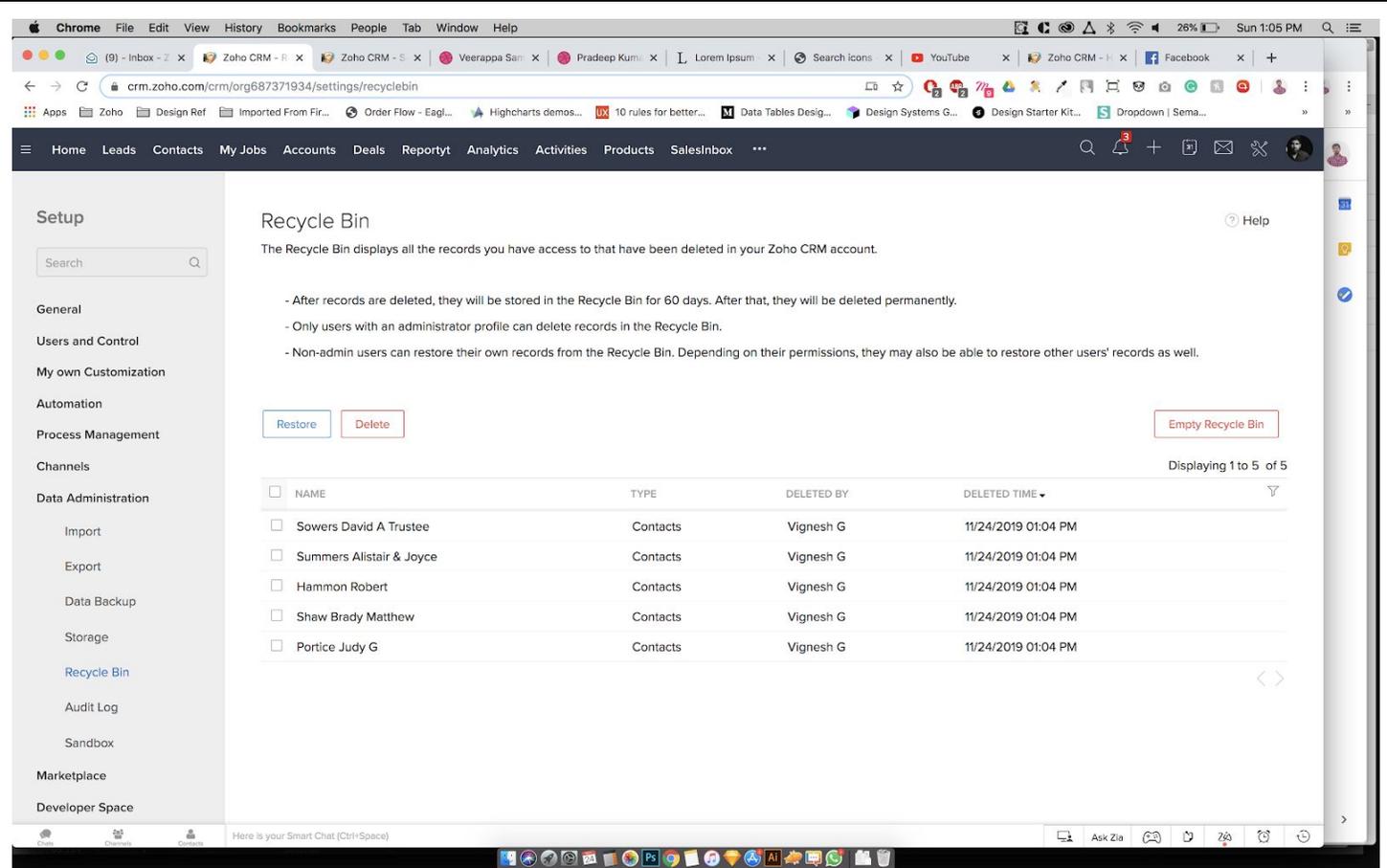


Pain Points: Alert popup is different style.

Solution: Need to follow the similar style for alert/info popup.

Conclusion:

Page Name : Data Administration - Recycle bin



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](#)

RECENT ACTIVITY 

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:



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...

[Manage](#)



Zoho Projects
The Zoho Projects integration allows you to plan, execute, and monitor customer projects from...

[Manage](#)



Zoho Desk
The Zoho Desk integration allows your sales, marketing, and executive teams to view and...

[Manage](#)



Zoho Survey
Zoho Survey integration allows you to send surveys and view responses from contacts within...

[Setup now](#)

Pain Points: Call to actions are in different color.

Solution: CTA should be in primary blue color.

Conclusion:

Zoho CRM for Gmail

[? 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

Zoho CRM for Google

[? Help](#)

Zoho CRM for Google makes it easier for your business to collaborate, communicate and share information with others.

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.

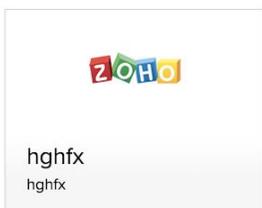
Solution: CTA should be in primary blue color.

Conclusion:

Page Name : Connections

All Connections Help

Add Connection +

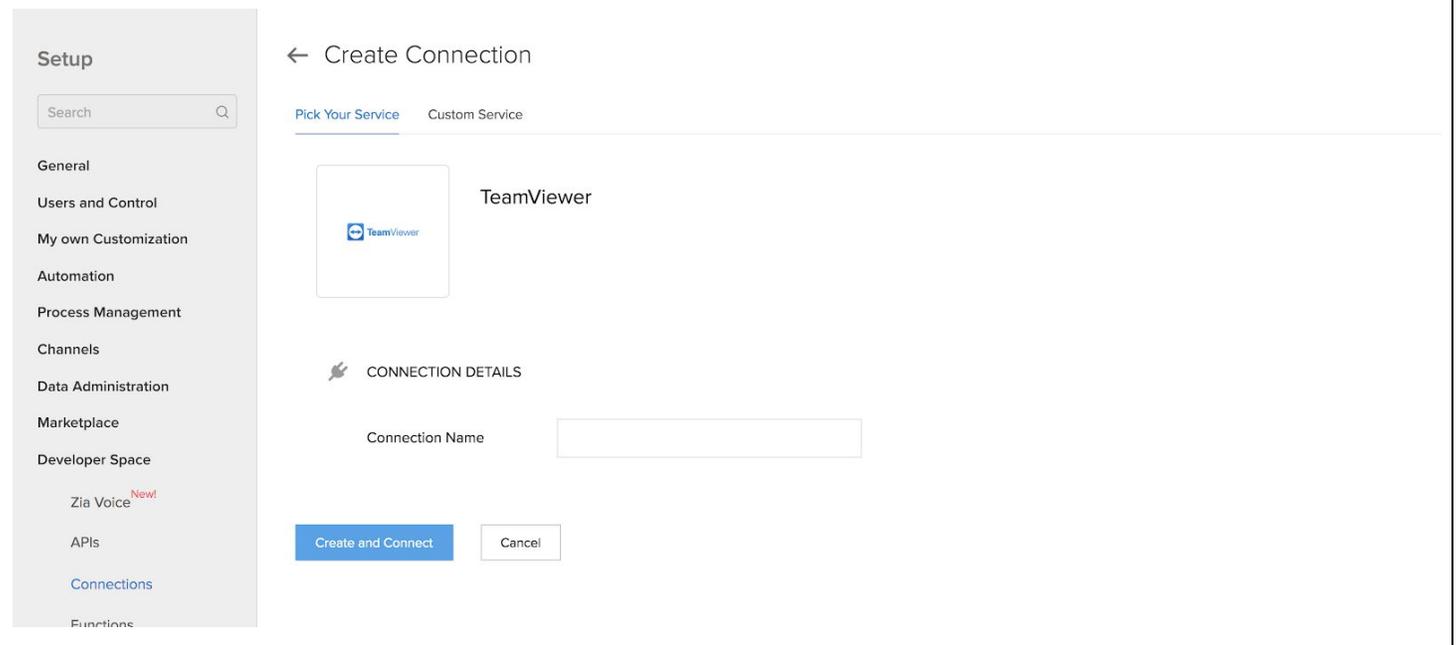


Pain Points: "+" used at the last for add connections. What is the purpose of having "+" at last?

Solution: Need to remove "+" and the call to action should be Add connections.

Conclusion:

Page Name : Connections



Setup

Search

General

Users and Control

My own Customization

Automation

Process Management

Channels

Data Administration

Marketplace

Developer Space

Zia Voice ^{New!}

APIs

Connections

Functions

← Create Connection

Pick Your Service Custom Service

TeamViewer

CONNECTION DETAILS

Connection Name

Create and Connect Cancel

Pain Points: Visually buttons and components are not aligned.

Solution: Need to align properly.

Conclusion:

Page Name : Marketplace - Microsoft



← Delete Connection

ZOH hghfx 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:

Page Name : Functions

[My Functions](#) [Gallery](#)



Attention: Usage of deprecated V1 API found

Your organization is still using the deprecated V1 API in functions. Those functions will stop working from Jan 1, 2020. [Download the file](#) which contains functions to be 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

[+ New Function](#)

Name

Category

REST API

Success Rate of your Accounts Associated
This action will determine the success rate of each accou...

Button

Pain Points: Here we actually creating a new function but here we have "+ new function"

Solution: CTA should be "Create New Function"

Conclusion:

Page Name : Functions - Gallery

[My Functions](#) [Gallery](#)

Listed below are the functions available in the gallery. You can make use of them by installing it.

[? Help](#)

All

Name

Places [?](#)

Create Projects while winning Potentials

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

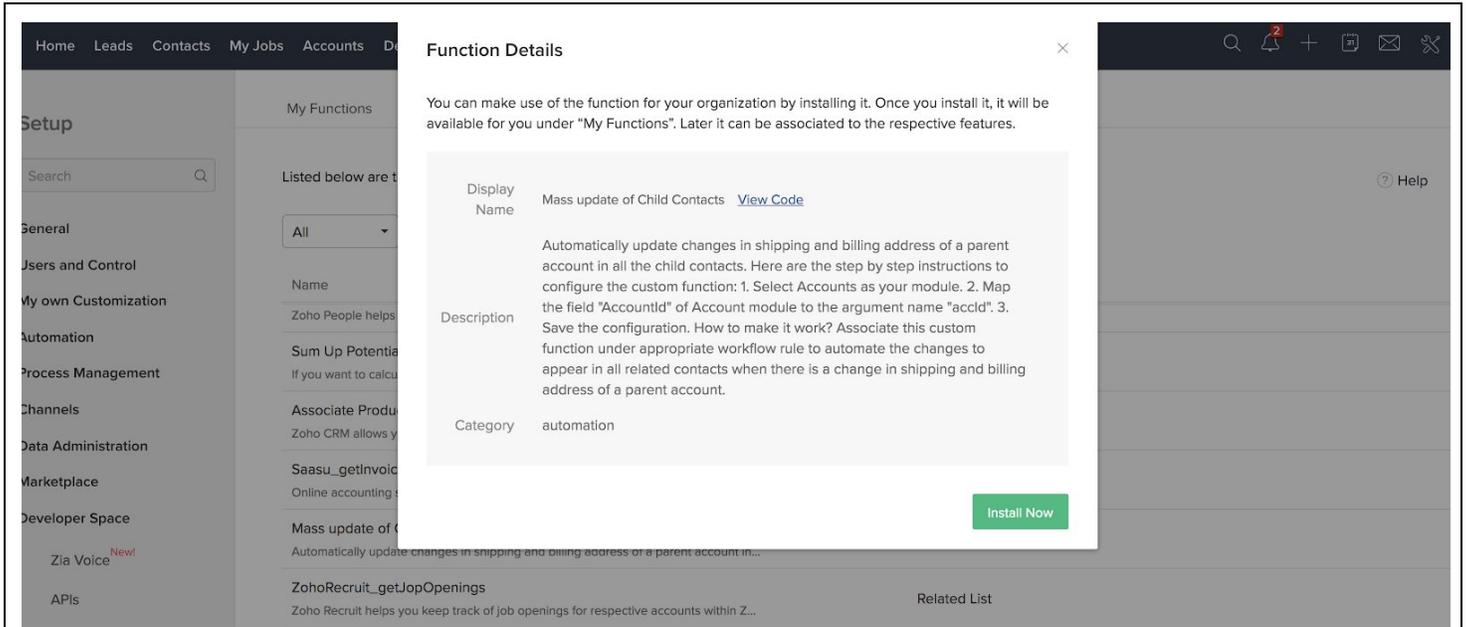
Closing Tasks of Junk Leads

There are many sources for lead generation within Zoho CRM. When you validate th...

Automation

[Install](#)

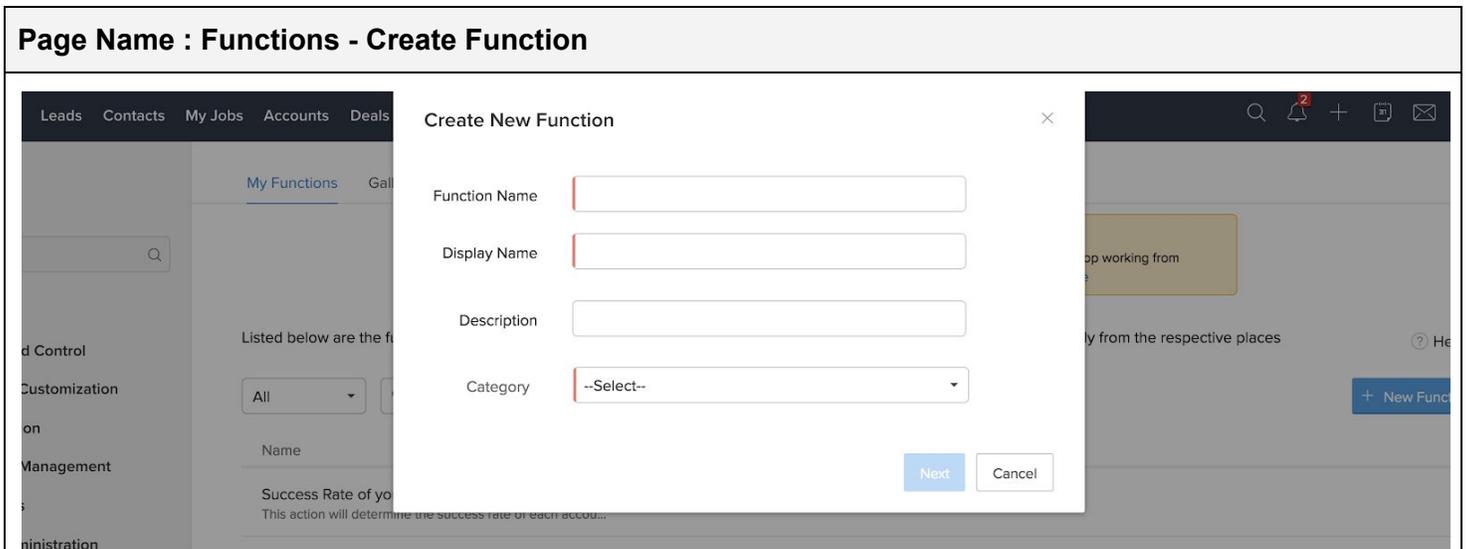
getTimeSheet InhsfromZohoPeople



Pain Points: Button colors are different.

Solution: We should follow the Primary button (Fill Blue) color.

Conclusion:



Pain Points: Button alignment is different than usual style.

Solution: Primary button should be on the right side and the cancel button should be left side. Both should be right alignment.

Conclusion:

Page Name : Function - Write

fdgxc
Function Description

Deluge Tasks void sfkg() Edit Arguments Help

```
1 //  
2 else if ( <variable> <opr> <expression> )  
3 {  
4 }  
5 <variables> = invokeurl  
6 [  
7   url: <expression>  
8   type: <expression>  
9   parameters: <expression>  
10  headers: <expression>  
11 ];
```

Pain Points: Two primary button placed in the same place. when I create something and click the save button 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

```
1 //  
2 info <expression>;
```

CONDITION

if

else if

else

NOTIFICATIONS

send mail

INTEGRATIONS

webhook

Failed to save the function
Syntax error. Expecting statement. Found '<', Line Number: 1

! You have not saved your changes.
Are you sure you want to move away from this page?
Yes, Leave Page Stay Here

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

Leads Contacts My Jobs Accounts Dea

My Functions

Control

Listed below are the functions available for your organization. These functions can be associated to the various features only from the respective places

Pain Points: Popup style and positions are different than usual style. Two types of popup style used here.

Solution: Alert/popup/info should be same style in all the places.

Conclusion:

Page Name : Widgets

Widgets

[? Help](#)

Widgets are simple embeddable UI components that can be written using your own JS Framework to perform the custom actions. It can ensure a seamless integration with your application data by providing a single sign-on between Zoho CRM and any third-party applications.

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 Widget"

Conclusion:

Page Name : Widgets - popup

The screenshot shows a Zoho CRM interface with a navigation bar containing 'Contacts', 'My Jobs', 'Accounts', 'Deals', and 'Rep'. A search bar is visible on the left. The main content area is titled 'Widgets' and contains a description: 'Widgets are simple embeddable UI components that can be written using your own JS Framework to perform the custom actions. It can ensure a seamless integration with your application data by providing a single sign-on between Zoho CRM and any third-party applications.' Below the description are two dropdown menus: 'All Types' and 'All'. A blue button with a '+' icon and the text 'Create New Widget' is on the right. A modal popup is centered on the screen with the text 'Are you sure you want to delete this widget?' and two buttons: 'Cancel' and 'Yes, Delete Now'.

Pain Points: Popup style is different than usual style.

Solution: Alert/popup/info should be same style in all the places.

Conclusion:

Page Name : Variables

CRM Variables

[? Help](#)

CRM variables are pseudo-module fields that are used to store static and reusable information in your Zoho CRM account. They can have a unique set of values and can be used as merge fields in email templates, or as reusable authentication parameters in functions and APIs.

All Variables

[+ 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

Pain Points: "+" is added before "Create".

Solution: Need to remove "+" and the CTA should be "Create New Variables"

Conclusion:

Page Name : Variables - Create new

Create CRM Variable

Variable Name

Description

Variable Type

Grouped Under

[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:

Page Name : Variables - Delete

The screenshot shows a CRM interface with a navigation menu (Leads, Contacts, My Jobs, Accounts, Deals, Reports) and a search bar. A modal popup is displayed in the center with the text: "Are you sure you want to delete this CRM variable asdfgg?". The popup has two buttons: "Delete" (in red) and "Cancel". In the background, a "CRM Variables" section is visible, with a search bar and a description: "CRM variables are pseudo-... merge fields in email templates, or as reusable authentication parameters in functions and APIs." To the right, a notification bell icon shows 7 alerts, and a "+" button is visible.

Pain Points: Delete popup is different style.

Solution: Need to remove "+" and the CTA should be "Create New Variables"

Conclusion:

Page Name : Webform

The screenshot shows the "Webforms" section of a CRM interface. The navigation menu includes "Webforms", "Auto-Response Rules", and "Unsubscribe Form". Below the navigation, there is a heading "Webforms" and a sub-heading "Seamlessly push data from your custom webforms into your CRM system. Make your webforms compatible with Google sites, Facebook, Joomla, WordPress, and more!". A "Module:" dropdown menu is set to "Leads". A blue button labeled "+ Create Web Form" is positioned on the right. Below this is a table with the following data:

FORM NAME	CREATED BY	STATUS	LAYOUT NAME
Sample Test	Vignesh G 26 Aug, 2019	<input checked="" type="checkbox"/>	Standard

Below the table, there is a link labeled "Embed options".

Pain Points: Here the functionality is creating a new webform. So "+" not needed here.

Solution: CTA should be "Create New Webform"

Conclusion:

Page Name : Webform - delete

The image displays two screenshots of the Zoho CRM interface, illustrating different styles for delete confirmation dialogs.

Top Screenshot: Shows a confirmation dialog for deleting a webform named "Sample Test". The dialog text reads: "Are you sure you want to delete **Sample Test**? Zoho CRM will no longer accept any data submitted through this form." The dialog has a red "Delete" button and a white "Cancel" button. The background shows the "Webforms" page with a search bar, a "Module: Leads" dropdown, and a "+ Create Web Form" button.

Bottom Screenshot: Shows a confirmation dialog for deleting an "Auto-Response Rule". The dialog text reads: "Are you sure?". The dialog has a white "Cancel" button and a red "Yes, delete" button. The background shows the "Auto-Response Rules" page with a search bar and a description: "Auto-response rules allow you 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 should be same style in all the places.

Conclusion:

Page Name : Webform - auto response rules

Webforms [Auto-Response Rules](#) Unsubscribe Form

Auto-Response Rules

[? Help](#)

Auto-response rules allow you to specify criteria that select the required email templates to be sent when a record is generated through webforms. You can only have one active Auto-response rule for a module.

Module : Leads ▾

[Create Rule](#)

RULE NAME	STATUS	CREATED BY	CREATED ON
hgvjkl	<input type="checkbox"/>	Vignesh G	11/27/2019
mn,,	<input type="checkbox"/>	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.

[Save](#)

[Cancel](#)

Rule Information

Rule Name hgvjkl [✎](#)

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	Sfdghn

Pain Points: When I create new rule it asking name only. Once I save the name it come back to list page. Again I have to click the rule and give the rule entry.

Solution: Need to rework the feature.

Conclusion:

Page Name : Webform - auto response rules

Webforms [Auto-Response Rules](#) Unsubscribe Form

Auto-Response Rules

[? Help](#)

Auto-response rules allow you to specify criteria that select the required email templates to be sent when a record is generated through webforms. You can only have one active Auto-response rule for a module.

Module :

[Create Rule](#)

RULE NAME	STATUS	CREATED BY	CREATED ON
hgvjkl	<input type="checkbox"/>	Vignesh G	11/27/2019
mn,,	<input type="checkbox"/>	Vignesh G	11/27/2019

Pain Points: When I create new rule it asking name only. Once I save the name it come back to list page. Again I have to click the rule and give the rule entry.

Solution: Need to rework the feature.

Conclusion: