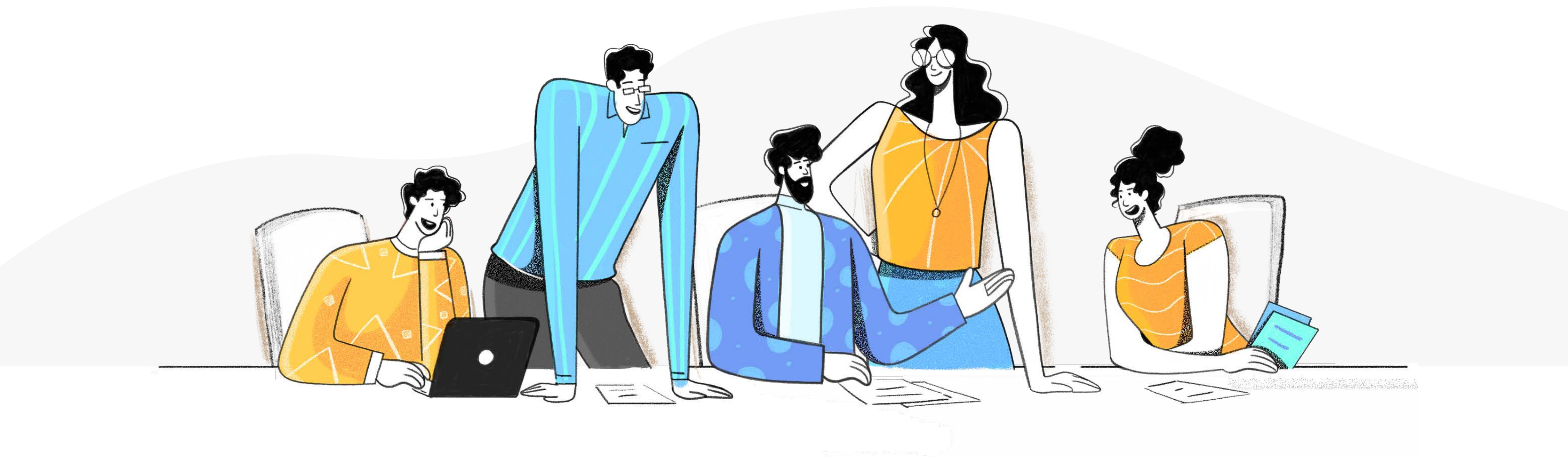
Zoho CRM

Licensing Team Users within Zoho CRM



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Team Users in Zoho CRM

Zoho CRM now allows you to add **team users,** who are users that may not directly be involved in the sales cycle, but are still closely involved in managing various aspects of the customer experience. Be it product management, legal, marketing, or any other team, team users work through specialized **team modules** which contain data pertinent to their team. They are empowered to create and manage these modules on their own. For instance, product management can track new feature development, legal can manage contract verifications, marketing can create a repository of customer case studies, and more. You can segment your CRM into dedicated **Teamspaces,** which help you group and organize all the modules relevant to a particular team.

Modules, users, and profiles: **Organization** vs. **Team**

- A module in Zoho CRM groups data records of a particular type of entity (Leads, Enterprise Customers, Feature Requests, etc.).
- Access to this data is determined by permission profiles, which are assigned to your CRM users.
- Modules, profiles, and users are all available at two levels — the **organization level** and **team level.**

Modules

Organization modules vs. Team modules

Modules are differentiated by the nature of data they contain, and who they're primarily meant to be used by.

Organization modules	Team modules
Organization modules (or org modules) are closely tied to the sales process and are meant to be used by full-scale CRM users. The default modules built into Zoho CRM (such as Leads, Deals, Contacts, and Accounts) are all org modules. CRM admins can also create custom modules for org-wide access. Org modules can be added to multiple teamspaces.	Team modules contain information that is supplementary to the sales process and enhances the overall customer experience. These are user-created custom modules meant to be used within specific teamspaces.

Users

Organization users vs. Team users

Users are differentiated by the nature of their role, which dictates the extent of CRM access they may require.

Organization users	Team users
Org users can be given access to all data and functionality across CRM. Their primary work is conducted within org modules, but they can be added to team modules as well.	Team users typically work with specific subsets of data and don't need complete access to CRM. They can be added to the team modules relevant to their role, where they perform the bulk of their work. They can be granted view-only access to a limited number of org modules.

Profiles

Organization profiles vs. Team profiles

Profiles dictate access to CRM data and other features.

Organization profiles	Team profiles
Org profiles can be used to set: • Module permissions for org modules • Access to other CRM features related to setup, automation, customization, etc. **Note:** Org profiles are a common CRM configuration. All users, irrespective of their type, will have an org profile.	Team module profiles are specific to a module. When a user (org or team) is added to a team module, they are assigned a team profile that determines their data access and actions available within the module.

Types of team module profiles

A unique aspect about team modules is that they come with their own built-in permission profiles. When adding users to a team module, you also assign them to a role within that module, which determines their level of access. While access to org modules and other CRM features are determined by the org profile assigned to a user, access to a team module is determined by the profile assigned to them for that module.

You can select from five team profiles:

Admins

Admins have complete control over the module’s records as well as its configurations and members.

Managers

Managers have full visibility and control over all records.

Members

Members can view all the records in the module, while they can also make changes to their own records.

Participants

Participants can only view and work with their own records in the module.

Requesters

Requesters are typically members from other teams, who can raise requests to the team managing the module by adding records under the “My Requests” tab. They can view the status of these requests from the same tab, but cannot make any other changes to the records.

You can further refine the module actions available and field-level access permissions for each profile.

Team module limits

Team modules are essentially a type of custom module, and they are available across all editions of Zoho CRM. Limits are based on the total number of custom modules (either custom organization modules or team modules):

	Standard	Professional	Enterprise	Ultimate
Total custom modules (custom org modules + team modules)	10	25	200	500

Functionalities supported within team modules

The following functionalities are supported within team modules. Some important points to note:

- Feature availability and limits are determined by the base edition of CRM.
- Users can access these features based on their license type and team module profile.

<table>
<tr><th colspan="2">Functionalities supported within team modules</th></tr>
<tr><th>Available to team users</th><th>Available to org users</th></tr>
<tr><td>Own and perform all operations on team module records, including:
1. Mass record updates
2. Share records
3. Import / export records
Customize team module fields, set layouts and layout rules, add custom buttons and links
Manage automation through workflows, Blueprint, assignment rules, approval and review processes
Create Canvas views
Associate webforms
Send emails, mass emails, and use mail merge
Manage custom views in team modules</td><td>The following features are available within team modules but can only be accessed/managed by users licensed as org users:
Build and access reports and dashboards based on team modules
Build custom functions, widgets, and access Sandbox</td></tr>
</table>

Functionalities not supported within team modules

Key functionalities not supported within team modules include:

- Majority of AI features
- Escalation rules
- Types of fields: Multiselect lookup, rollup summary, multi-user fields

Team Users: Functionalities supported within org modules

Team users conduct the majority of their work within their assigned team modules. For instance, the legal team may work on team modules dealing with Contract Renewals and Product Patents, while the procurement team may work with Vendor Issues and Material Requests. Since their need to access org modules (both default and custom) as well as other CRM settings is limited, they are assigned to a **system-defined org profile, called the Team User profile,** which restricts their access to the rest of CRM. The next page includes a summary of what this profile allows them to do **outside of team modules.**

What team users can do outside team modules	What team users cannot do outside team modules
• View data in up to 10 selected org modules • Add notes, tags, attachments to records • Get view-only access to: 1. Zoho integration tabs (except Phonebridge) 2. Social tab • View, create, and share public custom views • Interact / collaborate with users via Feeds • Access Zoho CRM mobile apps	• Own records in org modules • Mass update / delete, data import / export, and record sharing • Have any admin-level permissions (manage org users, work with calendar, customize org modules, set up sales pipeline etc.) • Access or work with Reports and Dashboards • Initiate calls/meetings • Create or manage automation (Workflows / Blueprint / CommandCenter / approval and review processes) • Perform data administration tasks (data migration, access Sandbox etc.) • Access AI / Zia features • Access Google / Microsoft integrations

Zoho CRM

If you would like to purchase team user licenses,
please write to:

sales@zohocorp.com