

Chapter 1

Getting Started with Zoho

In This Chapter

- ▶ The Zoho advantage: Why it's right for so many people
 - ▶ Signing up for Zoho
 - ▶ Finding out about the Zoho apps covered in this book
-

Welcome to Zoho, your online productivity and collaboration suite of applications. Zoho is different from a traditional suite of productivity apps in that it works online (although you can work with some Zoho apps offline and synchronize them when you're back online, as you'll see). All the applications are available at www.zoho.com; all you have to do is to sign up with Zoho.

Zoho offers all the applications you would expect in a full productivity suite and more. It's got all the applications you see in application suites costing hundreds of dollars, but Zoho is free (although some applications charge you to go beyond the basic levels). Zoho gives you word processing, spreadsheets, mail, customer relations management, database, invoicing, presentation applications — and that's just the beginning. It's fair to say that Zoho has an application matching just about every popular type of application out there.

Zoho is all about *cloud computing* — that is, storing your data online for use with online applications. No longer do you need to be tied to older software that hasn't been updated on your computer. In fact, you don't even have to run the application on your computer at all — it runs in the “cloud.” And that makes it easy to, among other things, share your data with co-workers online.

As you will see throughout this book, Zoho applications have a lot to offer. You can use them from anywhere with an Internet connection, share your data with others, and collaborate interactively. Best of all, you don't have to worry about buying new versions of Zoho as they come out because they're automatically updated online.

In this chapter, you take care of the first order of business: signing up for a Zoho account. Once you have a Zoho account, you're ready to start working with the applications. This chapter gives you a rundown of the Zoho applications covered in this book, explains what you can do with them, and points you to the chapters where you can find out more about them.

Signing Up for Zoho

To access all the Zoho applications, sign up for Zoho. Start at www.zoho.com, as you see in Figure 1-1.

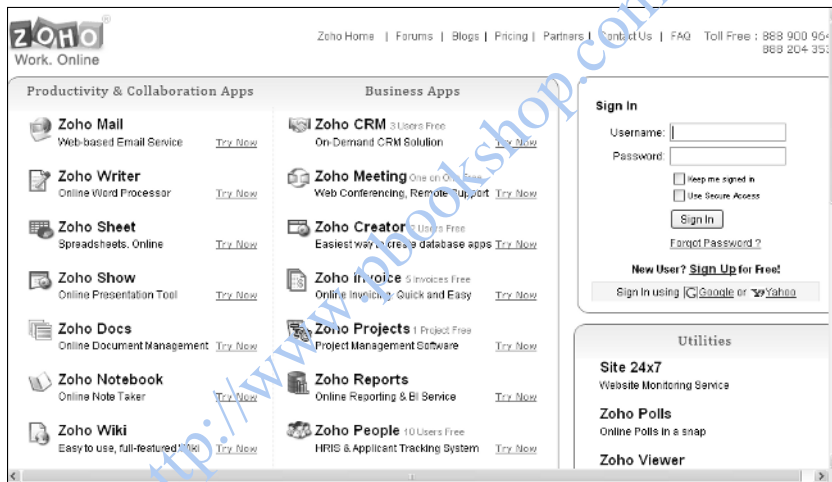


Figure 1-1:
Create
your Zoho
account
here.

Setting up your account

To enter the world of Zoho, you get a username and password which you need to use to sign in to every Zoho application. To get your username and password, follow these steps:

1. **Navigate your browser to www.zoho.com.**
2. **Click the Sign Up for Free! link you see at the right in Figure 1-1, opening the Create a Zoho Account page you see in Figure 1-2.**
3. **Enter the username you want to use.**

Your username should be 6 to 30 characters long, and it can contain letters, numbers, underscores, and/or dots (.).

Figure 1-2:
The Zoho
signup
page.

4. Enter a valid e-mail address.

Zoho will send a confirming e-mail to the address you enter.

5. Enter the password you want to use.

Your password should be 3 to 60 characters.

Don't use your Zoho username or e-mail address in your password. Zoho checks for that and will reject it.

6. Retype your password.

7. Enter the visual code you see into the text box just above the code.

If you get the visual code incorrect, Zoho will give you more chances by displaying another code (without erasing the information you already entered).

8. Select the check box for I Agree to the Terms of Service and Privacy Policy.

If you want to read the Zoho terms of service, click the Terms of Service and the Privacy Policy links.

9. (Optional) To subscribe to the Zoho newsletter, select that check box.

10. Click the Sign Up button.

If you entered all the information correctly, Zoho displays a new page with this message.



A verification email has been sent to steve@meadowridgetownhouses.com. Please click the link given in that email to confirm your registration. Note: If your registration is not confirmed, Zoho reserves the right to deactivate/delete it later without notice.

Just click Continue, and you should get an e-mail that reads something like this:

Hi username,

Thanks for registering with Zoho! To confirm your registration, please click here within 7 days of receiving this email, else the link will be expired.

If the above link doesn't work, please copy and paste the below URL on your browser.

https://accounts.zoho.com/confirm?DIGEST=Jkq;c8C5OMFe9Uvil7xnuB1T2H28*Hlte2P*14e.nm*9qag41TWWxDVik0BjK6fNEzdfLhUz_sn3hz3EMVGA5Mb*9xrKGaQOGbG3nFWY-

If this email means nothing to you, then it is possible that somebody else has entered your email address either deliberately or accidentally from the IP address xxx.xxx.xxx.xxx, so please ignore this email.

Thanks,

Team Zoho

<http://zoho.com>

Your subscription: You are receiving this email because of your registration with Zoho that entitles you to receive this one time mail communication. If you wish to unsubscribe from Zoho, visit <https://accounts.zoho.com>.

Zoho / AdventNet, Inc.

4900 Hopyard Rd, Suite 310 Pleasanton, CA 94588, USA

Phone: +1-925-924-9500 Fax: +1-925-924-9600

Signing in for the first time

You're almost done creating your Zoho account. To finish, follow these steps:

1. **Click the link in the confirmation e-mail (or copy the link and paste it into your browser's address bar).**

A page appears in your browser asking for your password.

2. **Enter your password.**

3. Click Continue.

You see another page with a Confirmation Successful message.

4. Click the Continue Signing In button.

The Zoho Sign In page appears, as shown in Figure 1-3.

Figure 1-3:
The Zoho
Sign In
page.

Welcome to Zoho!

The Zoho Single Sign-on (SSO) system allows you to access multiple Zoho services using a single Zoho ID and Password.

If you haven't got a Zoho account, register now by clicking on the "Sign Up" link at the right. The registration is simple and easy.

Important Note : Not all Zoho services come under Zoho SSO. The ZohoID you choose will not allow you to access other utility services: 24x7, Polls, Viewer, and Challenge.

If you want to try out other utility services, you will have to register separately at their respective home pages.

All Zoho Services will be brought under Zoho SSO soon.

Sign In

Username:

Password:

Keep me signed in
 Use Secure Access

[Forgot Password?](#)

New User? Sign Up for Free!

Sign In using [K](#), [Google](#) or [Yahoo](#)

5. Enter your username.**6. Enter your password.****7. Click the Sign In button.**

Your Zoho Accounts page appears, as shown in Figure 1-4.

Congratulations! You're in!

Figure 1-4:
Your Zoho
Accounts
page.

Zoho Accounts

Home | Blog | Forums | FAQ | Logout [sholzner]

Zoho Services

- [Zoho Show](#): Online presentation tool
- [Zoho Writer](#): Online word processor
- [Zoho Creator](#): Online web applications creator
- [Zoho Docs](#): Online Document Management
- [Zoho Meeting](#): Web Conferencing
- [Zoho Notebook](#): Online Note Taker
- [Zoho Wiki](#): Online Wiki with public, private & group permissions
- [Zoho Invoice](#): Online Invoicing. Quick and Easy
- [Zoho Reports](#): Online Database & Reporting
- [Zoho Planner](#): Online organizing tool
- [Zoho Sheet](#): Online spreadsheet services
- [Zoho Share](#): Centralized Public Repository
- [Zoho Projects](#): Project Management
- [Zoho Chat](#): Instant messaging and group chat tool

Personal Information

- [Zoho Services](#)
- [Contacts](#)
- [Groups](#)
- [My Email IDs](#)
- [Preferences](#)
- [Password](#)

From this point, click the links you see in Figure 1-4 to start any Zoho application: Writer, Sheet, Show, and so on.

However, after you have your username and password, I recommend that you go to each individual application's page — <http://writer.zoho.com> for Writer, or <http://sheet.zoho.com> for Sheet, for example — to start an application.



Here's why signing in directly from the app home page is better than going to the Accounts page and clicking an application's link. Zoho sometimes adds a navigation bar of links at the left of the application's page from which you can switch to other applications. That navigation bar takes up space, and usually pushes menus and buttons off the screen. Not optimal.

So, when you sign in at an application's home page, Zoho still asks for your username and password, but after you sign in, the application starts immediately.

Taking a Look at the Zoho Apps Covered in This Book

After you become an official Zoho user, take a look at what's available in Zoho. Zoho offers a ton of apps, but, unfortunately, I don't have space to cover them all here. Here are the ones I do talk about in this book.

Writer: Your word processor

Writer is the Zoho word processor extraordinaire, offering nearly all that word processors that cost hundreds of dollars have to offer. You can see Writer at work in Figure 1-5.

To start Writer, navigate to <http://writer.zoho.com>, enter your username and password (see the first part of this chapter for how to open a Zoho account), and click the Sign In button. That's all it takes.

With Writer, you can enter and format text, align page elements, insert images and hyperlinks, create tables, and work with templates. Additionally, you can use Writer to publish to the Web, share documents with others, and work offline. And as an organizational tool, you can add additional information with tags.

Read all about Writer in Chapters 2 and 3.

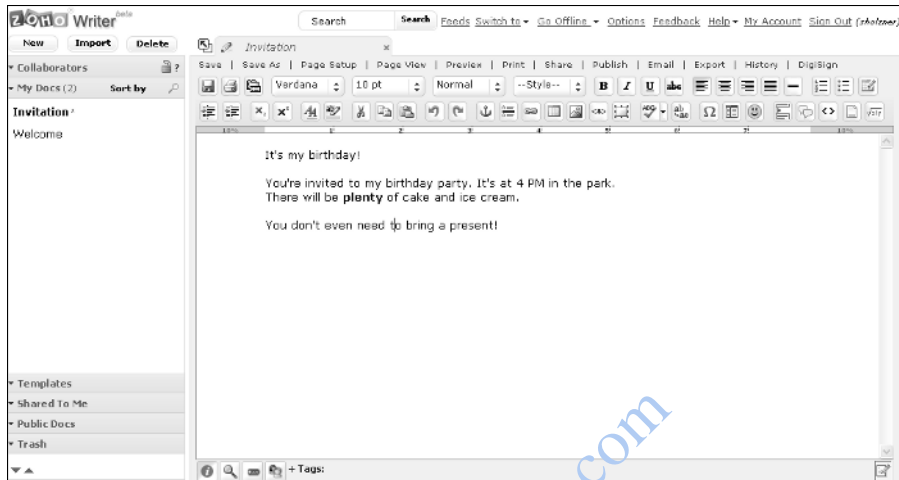


Figure 1-5:
Zoho Writer
at work.

Show: Your presentation manager

Show is your presentation manager, letting you create and show slides to your audience (much like Microsoft PowerPoint). You can see Zoho Show at work in Figure 1-6.

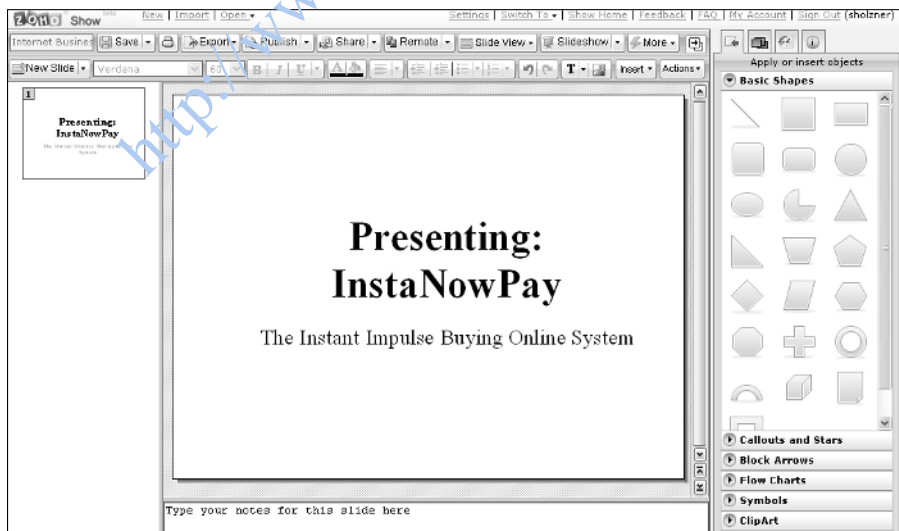


Figure 1-6:
Zoho Show
at work.

To start Show, navigate to <http://show.zoho.com>, enter your username and password, and click the Sign In button. With Show, you can create presentations by adding slides, using text and images, and adding shapes. You can also work with notes, share your presentations with others, and view presentations online.

Read all about Show in Chapter 4.

Notebook: Your online scrapbook

With Zoho Notebook, you can collect text, images, video, audio, and other items that you upload or that you clip from the Web. It's a great scrapbook application that allows you to collect items from all over and store them in one place. You can see Zoho Notebook at work in Figure 1-7.

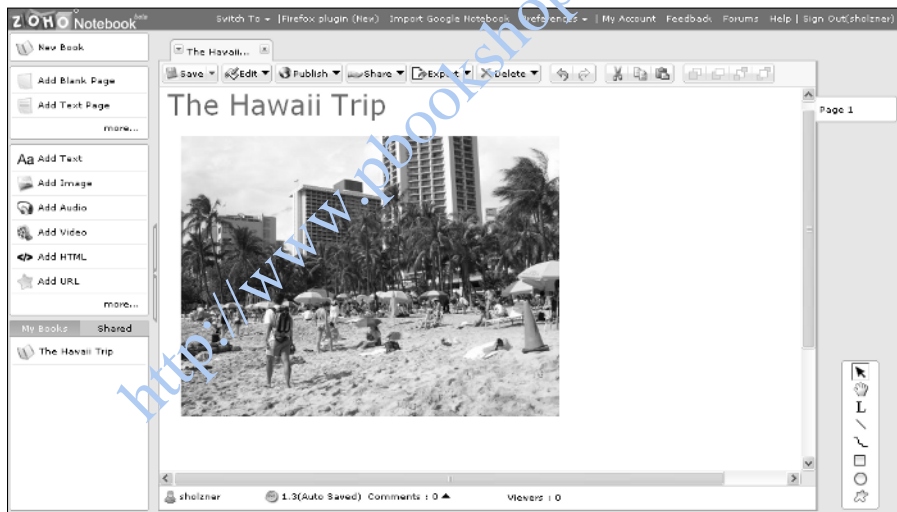


Figure 1-7:
Zoho
Notebook
at work.

To start Notebook, navigate to <http://notebook.zoho.com>, enter your username and password, and click the Sign In button. Zoho Notebook allows you to add all sorts of content (videos, text, images, and audio), add shapes and pages, use Web clipping, and share your notebook.

Read all about Notebook in Chapter 5.

Planner: Your online organizer

Ever have a paper organizer? You know, one of those heavy collections of tabbed papers that pages keep falling out of? Now you can take your organizer online, with Zoho Planner. You can keep track of events, addresses, meetings — just about everything in your busy life. You can see Zoho Planner at work in Figure 1-8.

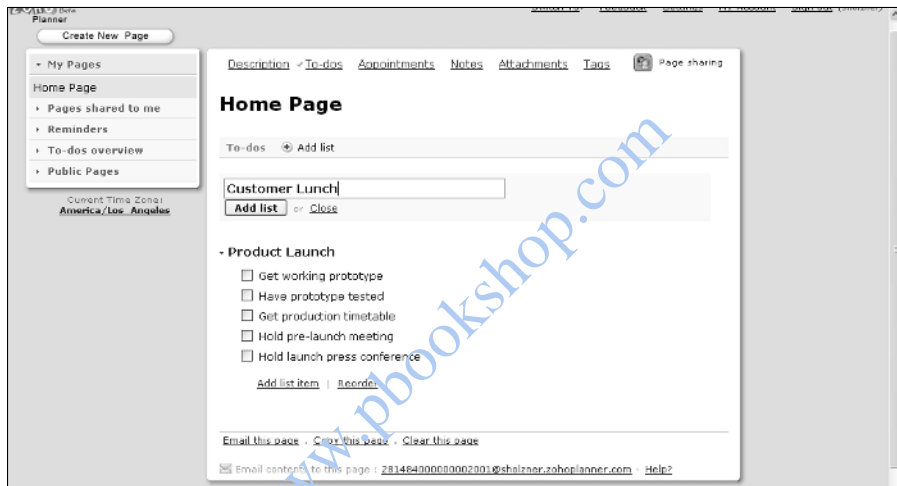


Figure 1-8:
Zoho
Planner
at work.

To start Planner, navigate to <http://planner.zoho.com>, enter your username and password, and click the Sign In button. With Planner, you can create a to-do list, add and edit items in a list, add appointments, get reminders, keep track of addresses, and share pages.

Read all about Planner in Chapter 6.

Mail: Your communication center

Many online application suites offer mail programs, and Zoho is no exception. You can send and receive mail, send and receive attachments, embed HTML in your mail, and more with Zoho Mail.

You can see Zoho Mail at work in Figure 1-9.

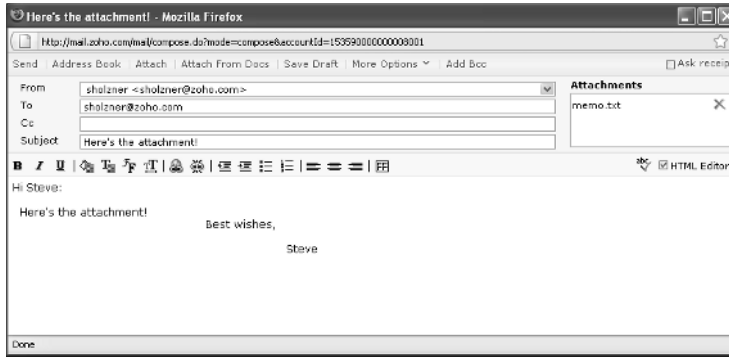


Figure 1-9:
Zoho Mail
at work.

To start Mail, navigate to <http://mail.zoho.com>, enter your username and password, and click the Sign In button.

Read all about Mail in Chapter 7.

Sheet: Your spreadsheet

You'd expect a serious application suite to have a powerful spreadsheet program, and Zoho does: Sheet.

Sheet is as feature rich as applications you could pay hundreds of dollars for, but it's completely free. You can enter or import your data, sort or filter it, and apply functions and formulas, all with ease. You can see Sheet at work in Figure 1-10.

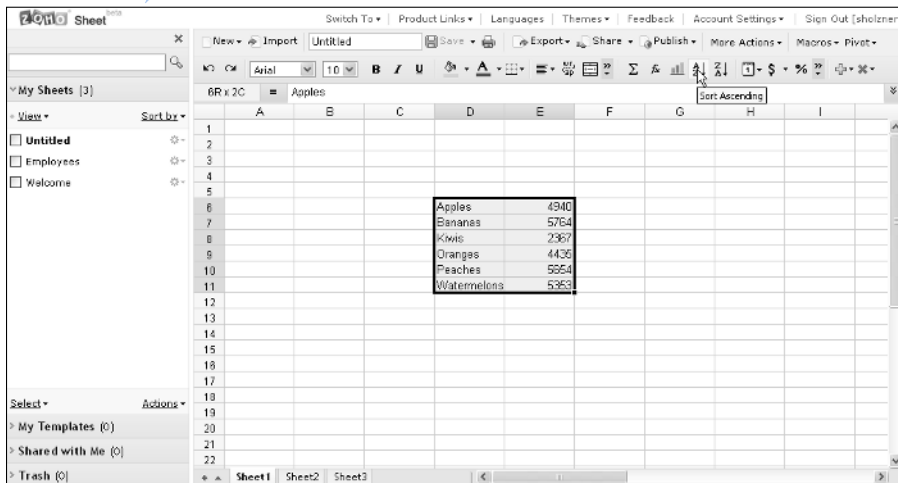


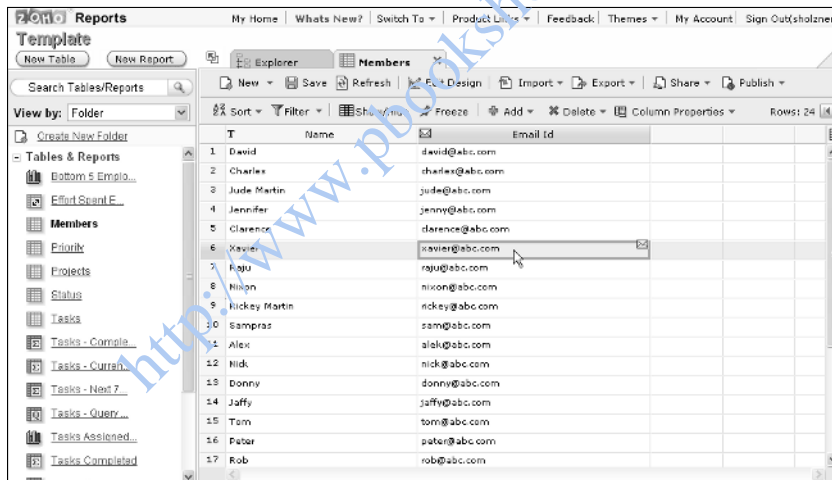
Figure 1-10:
Zoho Sheet
at work.

To start Sheet, navigate to <http://sheet.zoho.com>, enter your username and password, and click the Sign In button. Use Sheet to create, import, and format spreadsheets; enter and sort data; add and delete rows and columns; use formulas and functions; create pivot tables; export to other programs; handle external data; and share spreadsheets with others.

Read all about Sheet in Chapter 8.

Reports: Your database

Zoho even sports a database application: Zoho Reports. As strong of a database system as Microsoft Access, Reports allows you to sort and filter your records, as well as execute full SQL (Structured Query Language) statements, just as you'd expect from a professional database application. You can see Zoho Reports in Figure 1-11.



The screenshot shows the Zoho Reports interface. The main area displays a table with the following data:

ID	Name	Email Id
1	David	david@abc.com
2	Charles	charles@abc.com
3	Jude Martin	jude@abc.com
4	Jennifer	jenny@abc.com
5	Clarence	clarence@abc.com
6	Xavier	xavier@abc.com
7	Raju	raju@abc.com
8	Nixon	nixon@abc.com
9	Nickey Martin	nickey@abc.com
10	Sampras	sam@abc.com
11	Alex	alex@abc.com
12	Nick	nick@abc.com
13	Donny	donny@abc.com
14	Jaffy	jaffy@abc.com
15	Tom	tom@abc.com
16	Peter	peter@abc.com
17	Rob	rob@abc.com

Figure 1-11:
Zoho
Reports.

To start Reports, navigate to <http://db.zoho.com>, enter your username and password, and click the Sign In button. Use Zoho Reports to create a database from scratch or by importing, enter records, work with tables and edit their design, sort and filter records, execute SQL statements, choose from different views, and share your data online.

Read all about Reports in Chapter 9.

Projects: Your team scheduler

If you manage a team and want to keep on schedule with your projects, Zoho Projects offers a great solution. You can set up timelines, meetings, appointments, and tasks; assign tasks to people; and share everything interactively. You can see Zoho Projects at work in Figure 1-12.

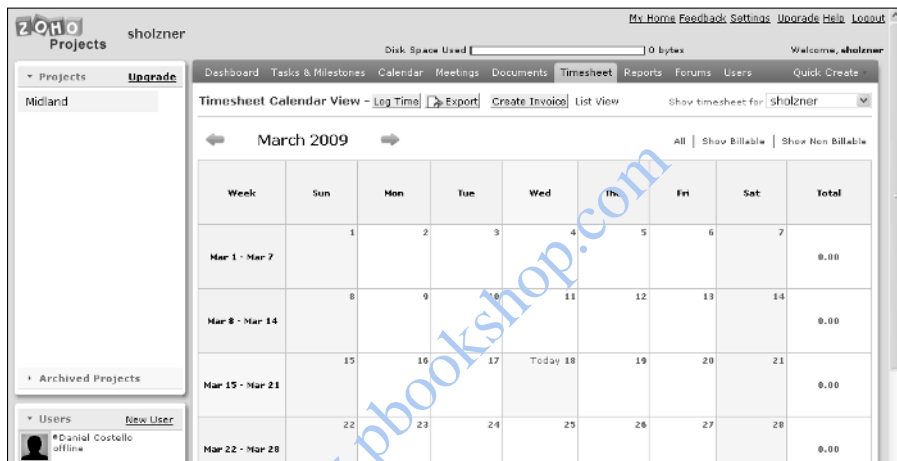


Figure 1-12:
Zoho
Projects
at work.

To start Projects, navigate to <http://projects.zoho.com>, enter your username and password, and click the Sign In button. Use Zoho Projects to work with the Projects dashboard; track time; create projects and milestones; add users and tasks, assign tasks and roles to users, and manage users; use the built-in calendar and schedule meetings; work with, upload, and organize documents; tag data; use forums; and generate reports.

Read all about Projects in Chapter 10.

Invoice: Your billing application

When it comes to collecting what customers owe you, Zoho Invoice is right there with you. From creating invoices to sending them out, Invoice gets the job done. You can see Zoho Invoice at work in Figure 1-13.

To start Invoice, navigate to <http://invoice.zoho.com>, enter your username and password, and click the Sign In button. Use Zoho Invoice to set your company profile, currency type, time zone, tax information, and logo; create an invoice; add and delete customers; and manage inventory.

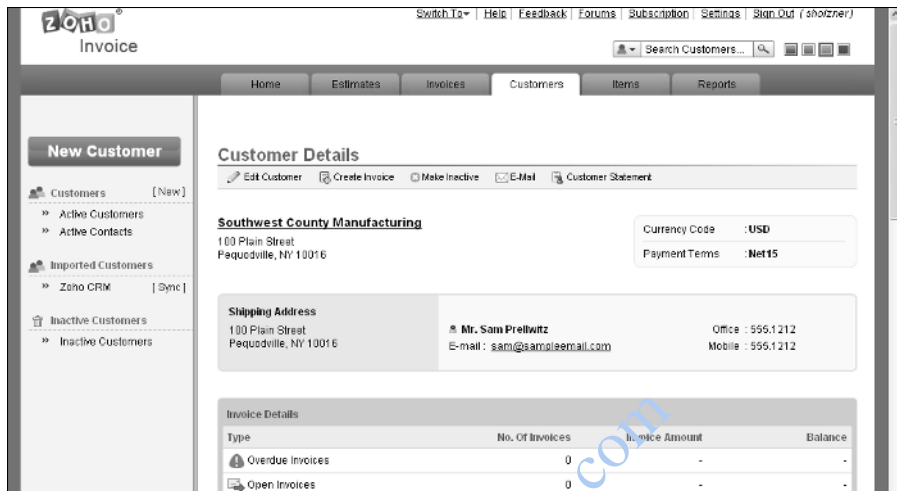


Figure 1-13:
Zoho
Invoice
at work.

Read all about Invoice in Chapter 11.

CRM: Your customer relationship management system

This is the big one, the whopper of the bunch. Zoho CRM is the biggest of the Zoho applications, and you can sign up and pay for multiple levels. Or, you can opt for a free level.

CRM stands for *customer relationship management*, and with Zoho CRM, you can keep track of just about every marketing and sales task there is. This application mimics CRM applications that sell for thousands of dollars.

You can track leads, potential leads, customers, sales orders, purchase orders, inventory, and much more. You can see Zoho CRM at work in Figure 1-14.

To start CRM, navigate to <http://crm.zoho.com>, enter your username and password, and click the Sign In button. Use Zoho CRM to customize your CRM; create records, forecasts, profiles, and custom views; add users; track inventory, marketing trends, and sales by sales rep; manage users and customers; and work with modules.

Read all about CRM in Chapter 12.

The screenshot displays the Zoho CRM interface for the 'Campaigns' module. The top navigation bar includes links for Home, Leads, Accounts, Contacts, Potentials, Campaigns, Reports, Dashboards, Forecasts, and Activities. A search bar is located on the left, and a 'Recent Items' section shows 'Townhouse Rentals'. The main content area features a table with the following data:

Campaign Name	Type	Status	Start Date	End Date
Townhouse Rentals	Advertisement	Active	03/12/2009	03/31/2009

Below the table, there are sections for 'Campaign Tools' (Mass Transfer Campaigns, Mass Delete Campaigns, Mass Update Campaigns, Export Campaigns) and 'Campaign Reports' (Campaigns Revenue Report, Campaign Leads, Other Reports). A calendar for March 2009 is visible in the bottom left corner.

Figure 1-14:
Zoho CRM
at work.

<http://www.pbookshop.com>