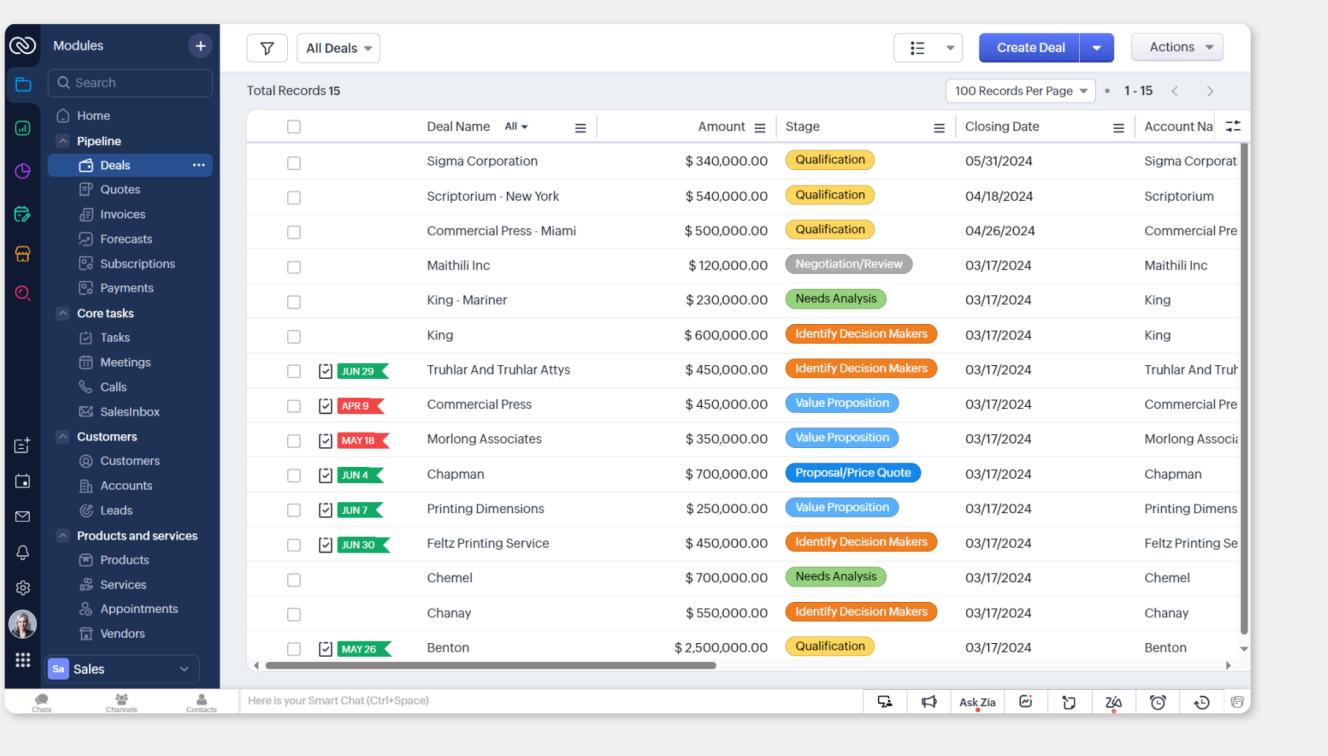


Navigating the Zoho CRM Next Gen UI

Navigating CRM's interface is easy, whether you're a new user or an experienced one.



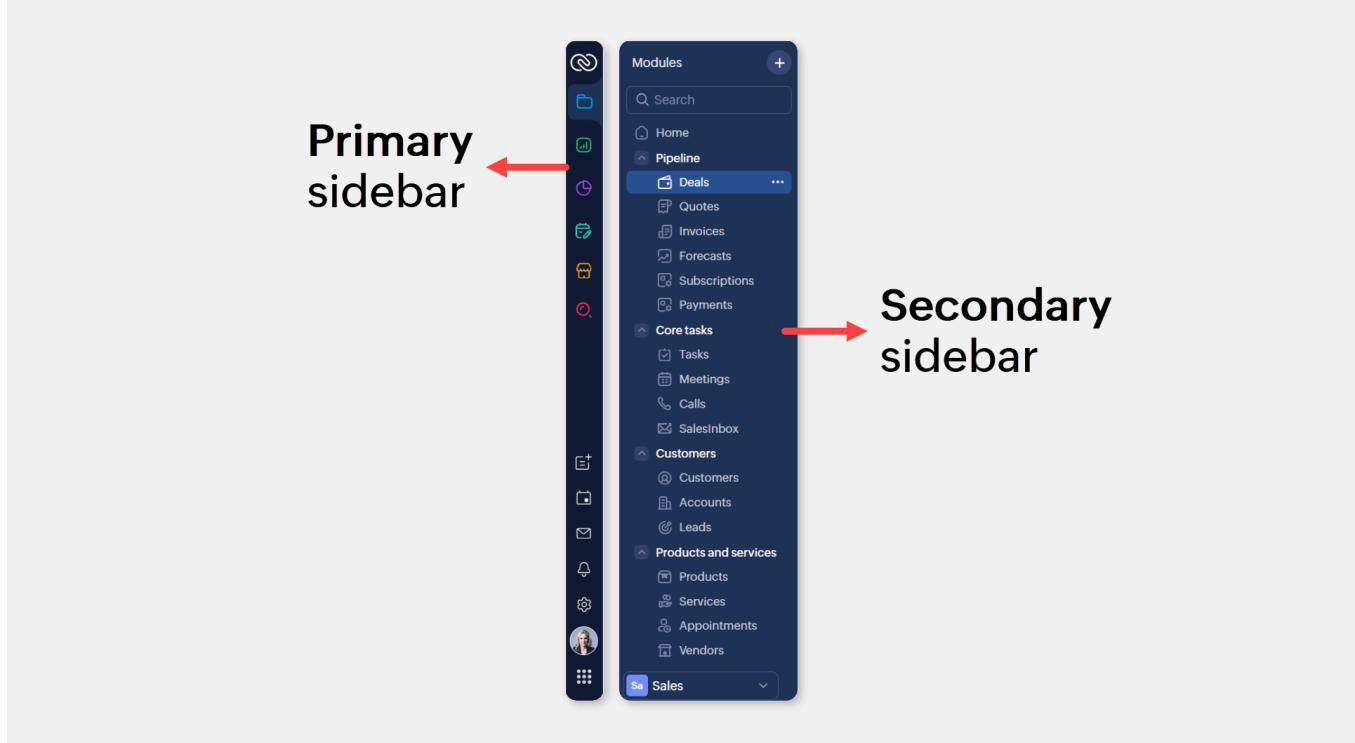
	Deal Name	All	Amount	Stage	Closing Date	Account Na
<input type="checkbox"/>	Sigma Corporation		\$ 340,000.00	Qualification	05/31/2024	Sigma Corporat
<input type="checkbox"/>	Scriptorium - New York		\$ 540,000.00	Qualification	04/18/2024	Scriptorium
<input type="checkbox"/>	Commercial Press - Miami		\$ 500,000.00	Qualification	04/26/2024	Commercial Pre
<input type="checkbox"/>	Maithili Inc		\$ 120,000.00	Negotiation/Review	03/17/2024	Maithili Inc
<input type="checkbox"/>	King - Mariner		\$ 230,000.00	Needs Analysis	03/17/2024	King
<input type="checkbox"/>	King		\$ 600,000.00	Identify Decision Makers	03/17/2024	King
<input checked="" type="checkbox"/>	JUN 29 Truhlar And Truhlar Atts		\$ 450,000.00	Identify Decision Makers	03/17/2024	Truhlar And Truh
<input checked="" type="checkbox"/>	APR 9 Commercial Press		\$ 450,000.00	Value Proposition	03/17/2024	Commercial Pre
<input checked="" type="checkbox"/>	MAY 18 Morlong Associates		\$ 350,000.00	Value Proposition	03/17/2024	Morlong Associa
<input checked="" type="checkbox"/>	JUN 4 Chapman		\$ 700,000.00	Proposal/Price Quote	03/17/2024	Chapman
<input checked="" type="checkbox"/>	JUN 7 Printing Dimensions		\$ 250,000.00	Value Proposition	03/17/2024	Printing Dimens
<input checked="" type="checkbox"/>	JUN 30 Feltz Printing Service		\$ 450,000.00	Identify Decision Makers	03/17/2024	Feltz Printing Se
<input type="checkbox"/>	Chemel		\$ 700,000.00	Needs Analysis	03/17/2024	Chemel
<input type="checkbox"/>	Chanay		\$ 550,000.00	Identify Decision Makers	03/17/2024	Chanay
<input type="checkbox"/>	MAY 26 Benton		\$ 2,500,000.00	Qualification	03/17/2024	Benton

The interface has two parts:

- The **sidebar** is for navigation and quick access to configuration. The option chosen in the **primary sidebar** will determine what's shown in the **secondary sidebar**.

For example, if you choose Modules in the primary sidebar, the secondary sidebar will list the different modules in that

teamspace.



- The **main pane** is for your work, with its content depending on your selection in the sidebar.
So, if you choose the Deals module in the sidebar, your list of deals will be shown in the **main pane**.

The screenshot shows the main pane after selecting the 'Deals' module from the sidebar. The main pane displays a grid of deals with columns for Deal Name, Amount, Stage, Closing Date, and Account Name. Each deal row has a checkbox in the first column. Some deals have due dates indicated in colored boxes (e.g., JUN 29, APR 9, MAY 18, JUN 4, JUN 7, JUN 30, MAY 26). The deals listed include Sigma Corporation, Scriptorium - New York, Commercial Press - Miami, Maithili Inc, King - Mariner, King, Truhlar And Truhlar Attys, Commercial Press, Morlong Associates, Chapman, Printing Dimensions, Feltz Printing Service, Chemel, Chanay, and Benton. The interface includes a header with a search bar ('All Deals'), a toolbar with 'Create Deal' and 'Actions' buttons, and a footer with pagination information ('100 Records Per Page', '1 - 15').

The Main Pane

To maximize your main pane, you can collapse your secondary sidebar by clicking the collapse icon at the bottom. Whenever needed, you can expand it by clicking the expand icon.

The screenshot shows the Zoho CRM Pipeline module. On the left is a dark sidebar with various modules like Pipeline, Deals, Customers, Products, and Sales. The 'Deals' module is currently selected. In the main area, there's a table titled 'Total Records 15' showing deals with columns for Deal Name, Amount, Stage, Closing Date, and Account Name. A circled icon in the sidebar indicates a related list menu.

Related List Menu of a record

The Related List menu in Zoho CRM provides quick access to associated records such as emails, notes, deals, activities, and custom modules. This menu can be expanded or hidden, based on your viewing preferences.

By default, this related list menu will be hidden. This is to allow you to view more record data without excessive scrolling. Simply hover over the Related List Menu icon to view a list of related records and take actions from the pop-up directly. However, if you have extensive use of the related list menu in a record, you can choose to expand it.

The screenshot shows the Zoho CRM Leads module. The sidebar includes Home, Leads, Contacts, Accounts, Deals, Tasks, Meetings, Calls, Products, Quotes, Sales Orders, Purchase Orders, Invoices, SalesInbox, Campaigns, Vendors, Price Books, Cases, and CRM Teamspace. The 'Leads' module is selected. The main area displays a table of leads with columns for Lead Name, Company, Email, Phone, and Lead Owner. A circled icon in the sidebar indicates a related list menu.

The sidebar is filled with options that let you:

- Navigate to different modules in your teamspace
- Switch to a different teamspace
- Search for records
- Access your calendar and emails
- Check for signals, and so on.

Let's look at these different options one by one!

Teamspace switcher

Teamspaces can be created for each team within the CRM, whether it be for specific business functions or cross-functional teams. You can switch from one teamspace to another if you are a member of multiple teamspaces. To do so, you can:

1. Click on the teamspace switcher located at the bottom of the secondary sidebar.
2. Select the teamspace you want to switch to.

Deal Name	All	Amount	Stage
Sigma Corporation		\$ 340,000.00	Qualified
Scriptorium - New York		\$ 540,000.00	Qualified
Commercial Press - Miami		\$ 500,000.00	Qualified
Maithili Inc		\$ 120,000.00	Negotiating
King - Mariner		\$ 230,000.00	Needs Analysis
King		\$ 600,000.00	Identify Decision
Truhlar And Truhlar Attys	JUN 29	\$ 450,000.00	Identify Decision
Commercial Press	APR 9	\$ 450,000.00	Value Proposition
Morlong Associates	MAY 18	\$ 350,000.00	Value Proposition
Chapman	JUN 4	\$ 700,000.00	Proposal
Printing Dimensions	JUN 7	\$ 250,000.00	Value Proposition
Feltz Printing Service	JUN 30	\$ 450,000.00	Identify Decision
Chemel		\$ 700,000.00	Needs Analysis
Chanay		\$ 550,000.00	Identify Decision
Benton	MAY 26	\$ 2,500,000.00	Qualified

Teamspace switcher actions

As a teamspace admin or the CRM admin, you have the ability to start creating a new teamspace, make changes to existing ones, and manage teamspaces in the teamspace switcher.

The screenshot shows the CRM's Pipeline module. A context menu is open over the 'Marketing' module, with options 'New Teamspace' and 'Manage Teamspace' highlighted with red boxes. The sidebar on the left lists various team modules: CRM Teamspace, Sales, Pre-sales, Marketing, Onboarding, Account management, Partner management, Legal, Product, Finance, and Events. The main area displays a list of deals with columns for Deal Name, Amount, and Stage.

To learn more about teamspaces, see [Teamsplaces](#).

Modules tab

The screenshot shows the 'Modules' tab in the CRM sidebar. It displays a tree structure of modules and folders. The 'Pipeline' folder is expanded, showing its sub-modules: Deals, Quotes, Invoices, Forecasts, Subscriptions, Payments, Tasks, Meetings, Calls, and SalesInbox. Other collapsed sections include 'Core tasks', 'Customers', 'Accounts', and 'Leads'. Red arrows point from the text labels to the corresponding elements: a red arrow points to the 'Modules' tab title, another to the 'Pipeline' folder, and a third to one of the module items under 'Pipeline'.

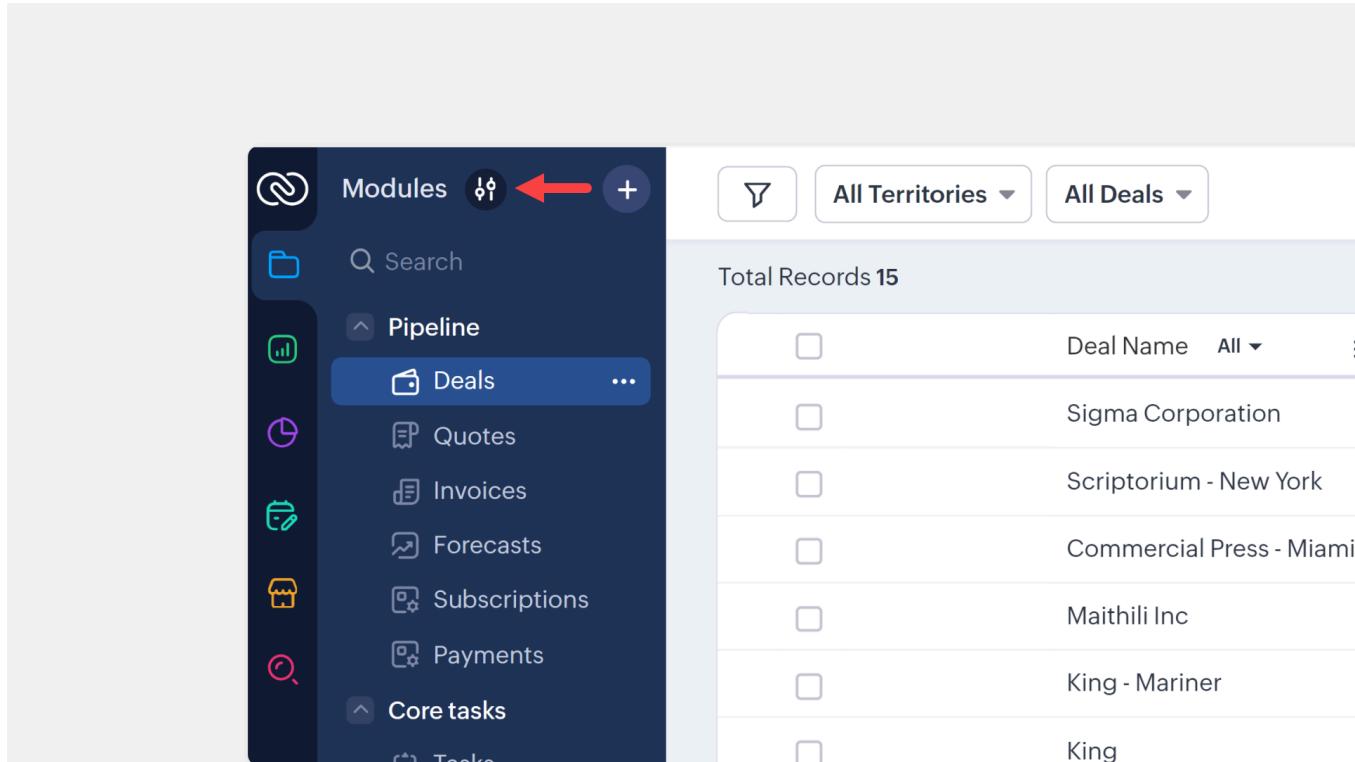
Teams work and store data within the CRM in modules. The **modules tab** displays the **folders** and **modules** within a teamspace, allowing users to collapse or expand folders and choose the necessary module. There are two types of modules in CRM: **Organization modules** and [team modules](#).

Module tab actions

Teamspaces admins and CRM admins can **add**, **remove**, and **rearrange** the modules in a teamspace within the secondary sidebar itself.

To do this, they can:

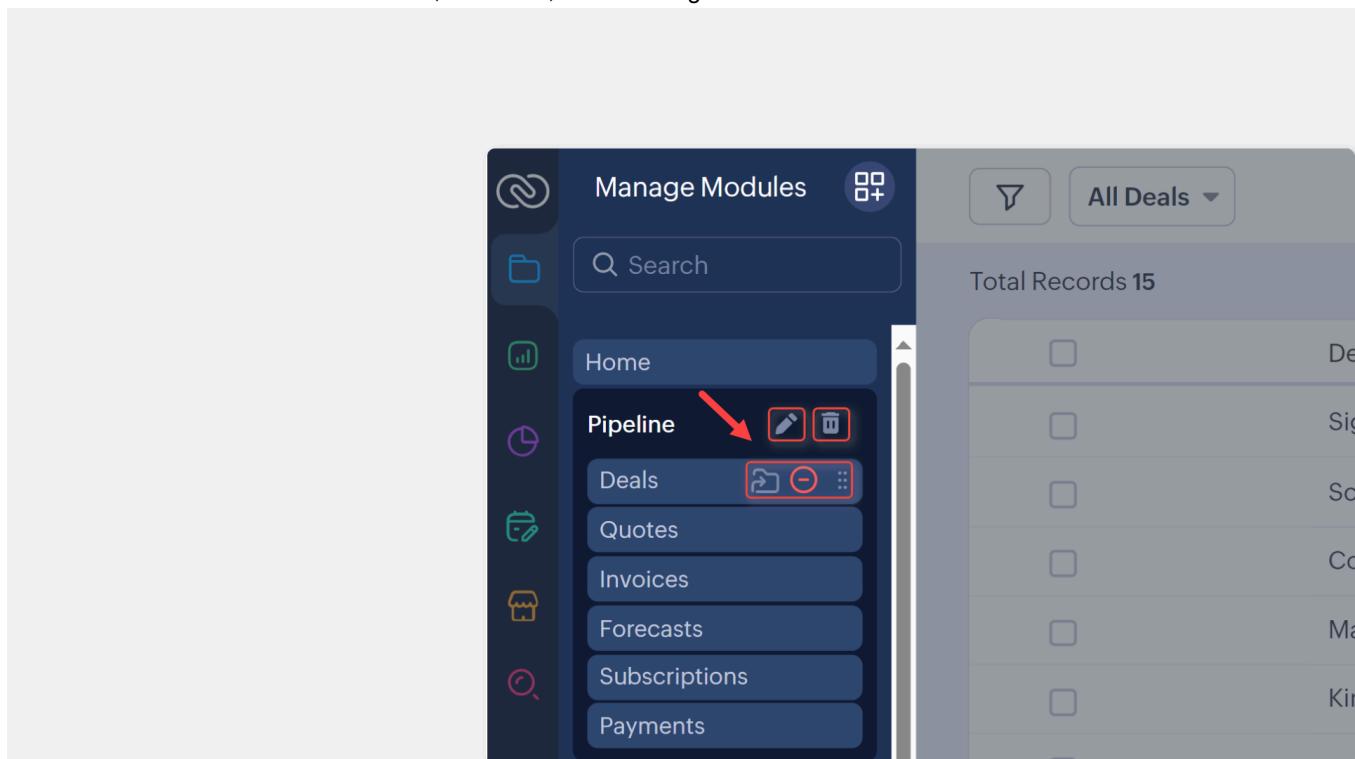
1. Click the **Manage Modules** icon (⚙️) inside the Modules tab.



The screenshot shows the 'Modules' tab interface. On the left is a sidebar with various icons. In the center, the 'Pipeline' section is expanded, showing 'Deals' as the active module. A red arrow points to the 'Manage Modules' icon (a gear and wrench symbol) located at the top right of the sidebar. To the right of the sidebar is a list of deals with columns for checkbox, Deal Name, and Territory. The deals listed are: Sigma Corporation, Scriptorium - New York, Commercial Press - Miami, Maithili Inc, King - Mariner, and King.

	Deal Name	Territory
	Sigma Corporation	
	Scriptorium - New York	
	Commercial Press - Miami	
	Maithili Inc	
	King - Mariner	
	King	

2. You can move a module to a new folder, remove it, and rearrange it. You can also rename and delete a folder from here.



The screenshot shows the 'Manage Modules' screen. The sidebar on the left has the 'Manage Modules' icon highlighted. The main area shows a list of modules under the 'Pipeline' folder: Deals, Quotes, Invoices, Forecasts, Subscriptions, and Payments. Each module has an edit icon (pencil) and a delete icon (trash bin). A red arrow points to the edit icon for the 'Pipeline' module. The right side of the screen shows the same deal list as the previous screenshot.

	Deal Name	Territory
	Sigma Corporation	
	Scriptorium - New York	
	Commercial Press - Miami	
	Maithili Inc	
	King - Mariner	
	King	

3. To add a module, click the Add Module (⊕) icon.

The screenshot shows the 'Manage Modules' interface. On the left, there's a sidebar with various icons and a search bar. The main area is titled 'Pipeline' and lists 'Deals', 'Quotes', 'Invoices', 'Forecasts', 'Subscriptions', and 'Payments'. Below that is a section for 'Core tasks' with 'Tasks'. At the top right, there's a blue button with a white plus sign (⊕) and a red arrow pointing to it. To the right of the button is a search bar and a dropdown menu labeled 'All Deals'. The main content area is titled 'Total Records 15' and shows a list of deals with columns for Deal Name, Status, and Amount. One deal, 'Truhlar And Truhlar Attys', has a checkmark next to its status indicator.

4. Select the necessary modules, and clicking **Add Selected**.

This screenshot shows the 'Add Modules' dialog box. On the left, there's a list of modules with checkboxes. Several checkboxes are checked, including 'Sales Orders', 'Purchase Orders', 'Documents', and 'My Jobs'. A red circle with the number '1' is placed over the checked 'Documents' checkbox. At the bottom of the list, there's a blue button labeled '2 Add selected'. To the right of the dialog is the same deal list as the previous screenshot, showing the same 15 records. A red arrow points from the 'Add selected' button in the dialog to the 'My Jobs' checkbox in the list.

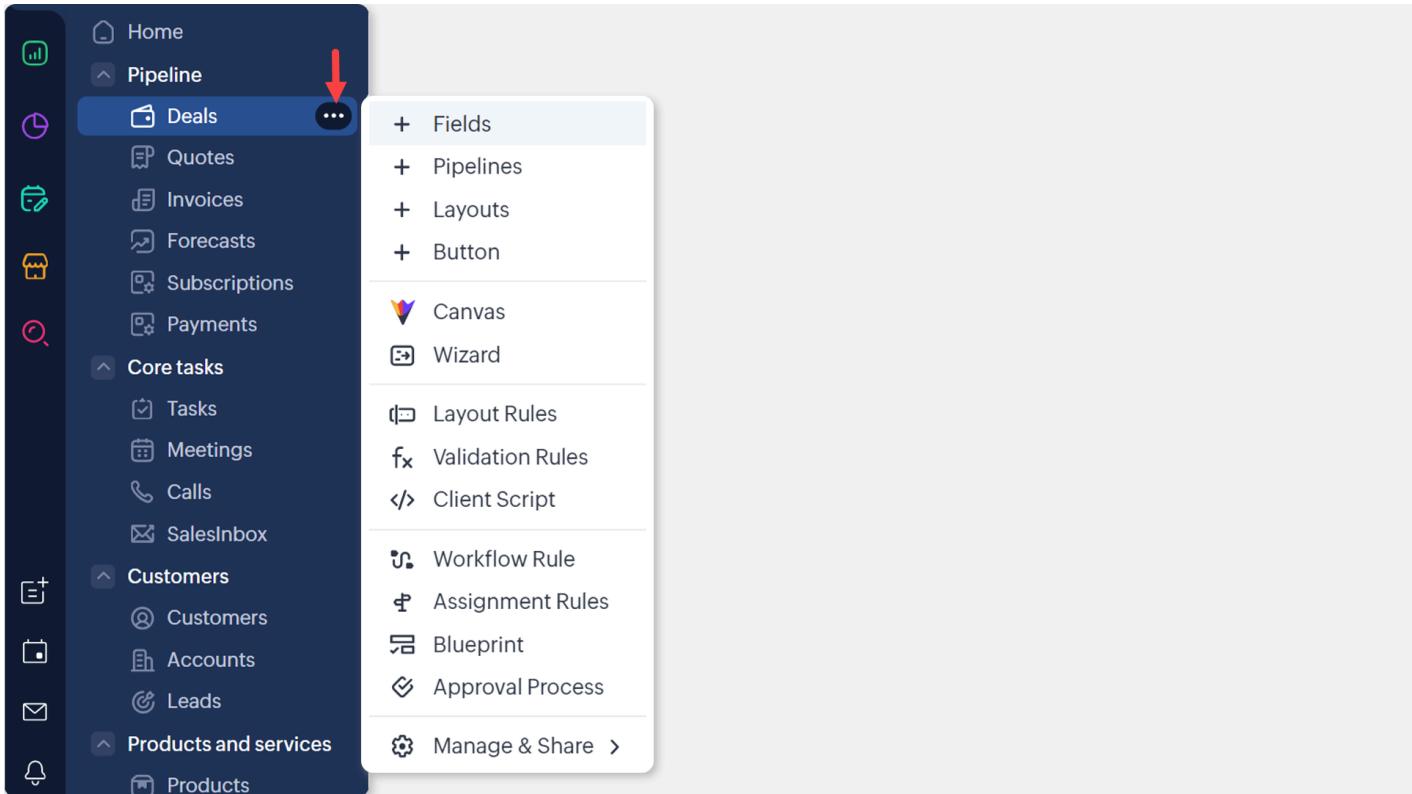
5. In the *Choose Folder* popup, select the **folder** where these modules need to be added and click **Done**. The selected modules will be added to the teamspace.

The screenshot shows a CRM application interface. On the left is a dark sidebar with icons for different modules: Accounts, Leads, Products and services (with子菜单Products, Services, Appointments, Vendors), Sales Orders, Purchase Orders, Documents, My Jobs, and Voice of the Customer. The Sales Orders module is highlighted with a red box. Below the sidebar is a blue header bar with a user profile icon and a 'Sales' tab. To the right is a list of deals, each with a checkbox, a date (e.g., JUN 29, APR 9, MAY 18, JUN 4, JUN 7, JUN 30, MAY 26), and the deal name (e.g., Truhlar And Truhlar Attys, Commercial Press, Morlong Associates, Chapman, Printing Dimensions, Feltz Printing Service, Chemel, Chanay, Benton). A green progress bar at the bottom indicates completion.

You can even create modules by clicking the handy + icon in this tab.

The screenshot shows a 'Modules' screen. On the left is a sidebar with icons for Home, Pipeline (with子菜单Deals, Quotes, Invoices, Forecasts, Subscriptions, Payments), and a search bar. The 'Deals' item under Pipeline is highlighted with a blue background. To the right is a detailed view of the Deals module. It shows a header with a filter icon, 'All Deals', and 'Total Records 15'. Below is a list of deals with checkboxes and names: Sigma Corp, Scriptorium, Commercial F, and Maithili Inc.

If you want to configure something for a module, you can simply click the (...) icon against it and select the configuration to get started!



To learn more about organization modules, see: [Organization modules](#).

To learn more about team modules, see: [Working with Team modules](#).

Note

- The behavior of the + button is contextual.
 - When the sidebar is expanded and the module tab is selected, it lets you create a new module.
 - When the sidebar is collapsed, the + icon will let you create a new module, new report, or a new dashboard (if you've enabled these in that teamspace).
- If you're in the Reports tab, you can create a new report using this.
- If you're in the Analytics tab, clicking it will create a new dashboard.

Reports tab

Reports tab

All Reports

Report Name
<input type="checkbox"/> ★ Performance by Sales People across roles.
<input type="checkbox"/> ★ Star performers across roles.
<input type="checkbox"/> ★ Visits by Lead, Customer, and Prospects
<input type="checkbox"/> ★ Top Referrers
<input type="checkbox"/> ★ New Leads generated this month
<input type="checkbox"/> ★ Leads visits this month

Reports are a useful tool for combining relevant data towards specific goals, such as a monthly report for new leads. The **reports tab** displays all the reports accessible to you. After selecting this tab, the sidebar will show all the folders that the reports have been organized in.

Reports tab actions

In addition to navigating to reports, you can use the sidebar to **share**, **hide**, **rename**, and **rearrange** report folders.

Reports

Folders

Recently Viewed
Shared Reports
Scheduled Reports
Recently Deleted
Account and Custo...
Deal Reports
Lead Reports
Campaign Reports
Case and Solution R...

Share
Hide
Rename

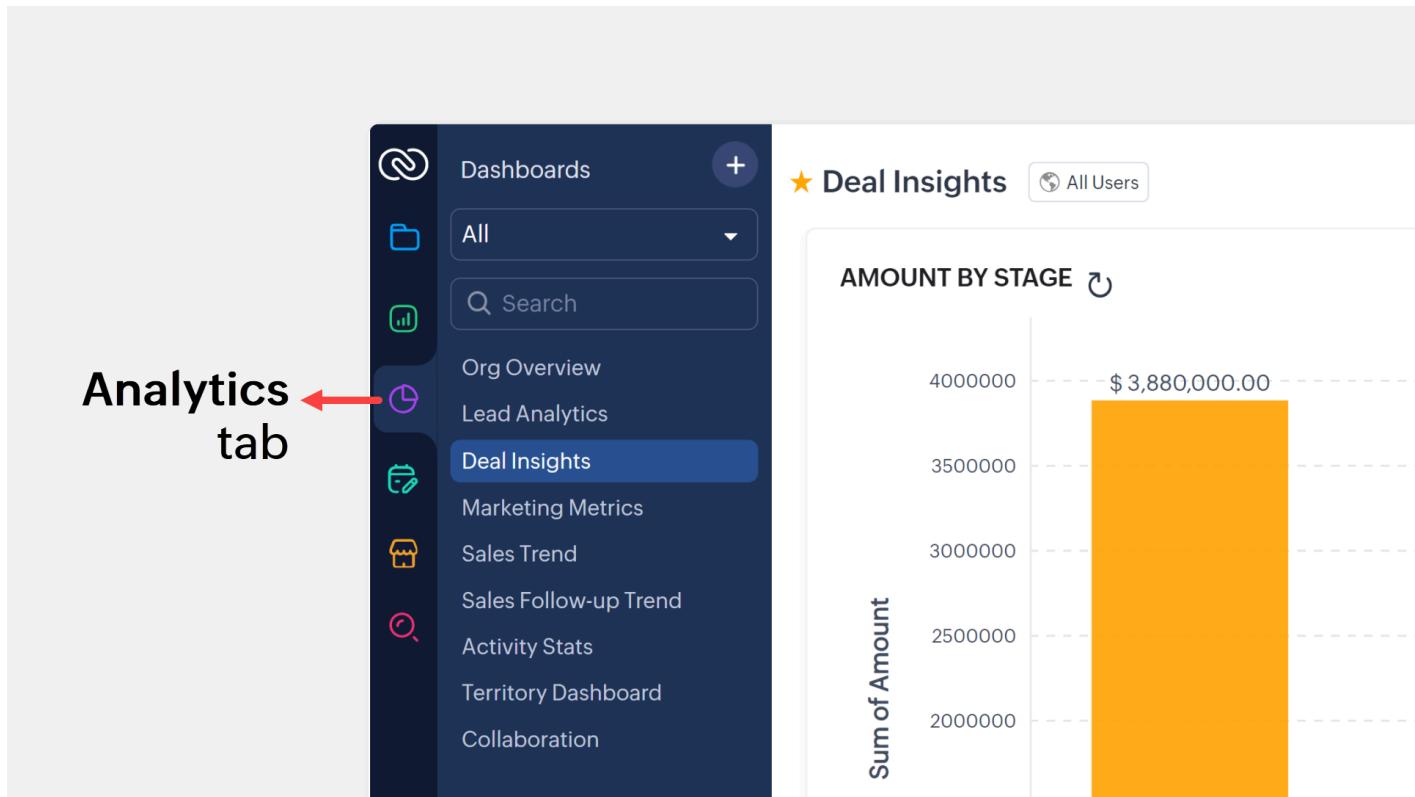
As mentioned in a note in the previous section, the + button can be clicked to create a new report.

To learn more about reports, see [Reports](#).

Note

If the Reports tab is not visible, it is likely that your teamspace admin has disabled it for your teamspace.

Analytics tab



Zoho CRM's analytics tab offers a condensed overview of data in the form of dashboards, allowing for real-time analysis of sales stages and business operations. Users can create and share dashboards with all or select users.

Analytics tab actions

Once this tab is selected, the sidebar will show all the dashboards, and you can filter them by folder and favorite the most frequently used ones.

The + button can be clicked to create a new dashboard.

To learn more about analytics in CRM, see [Analytics](#).

Note

If the Analytics tab is not visible, it is likely that your teamspace admin has disabled it for your teamspace.

My Requests tab

My Requests tab

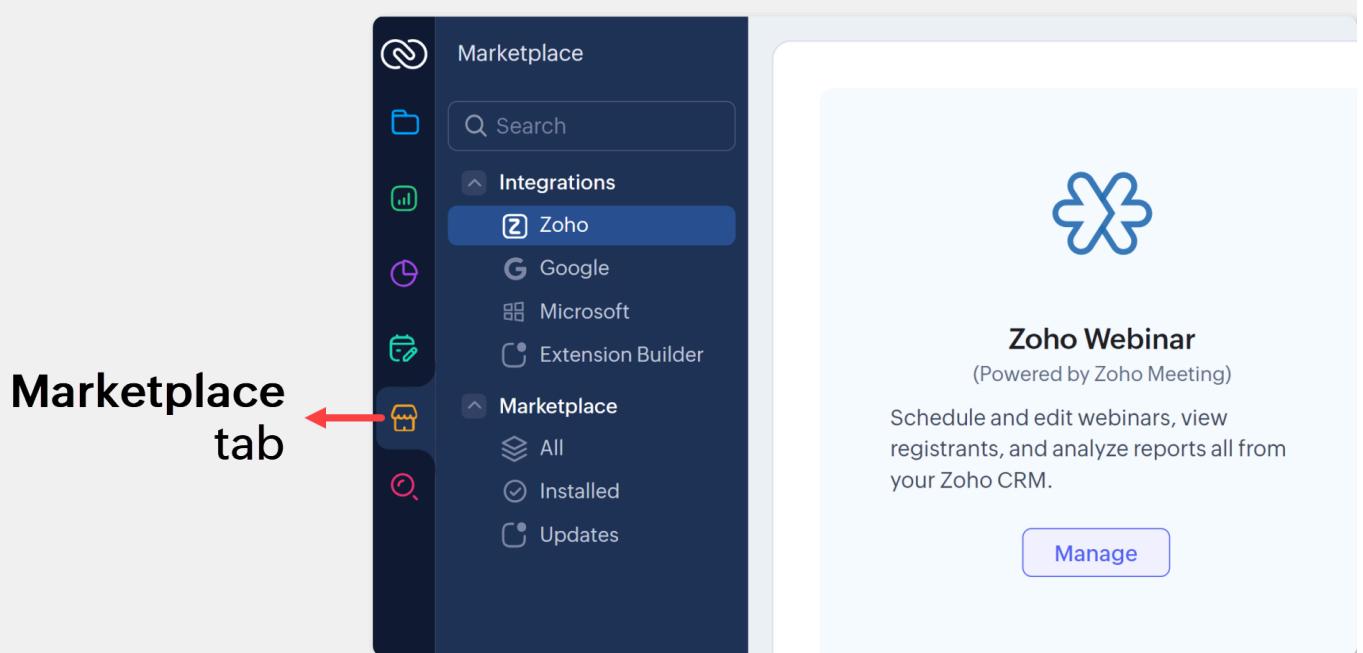
The screenshot shows the 'My Requests' tab in a CRM application. On the left is a dark sidebar with icons for different modules: Case Studies (highlighted in blue), Competitor Analysis, Demo Requests, Expense Tracking, Win/Loss analysis, My cases, Audits, Legal reviews, Custom collateral, Partner training sessions, and Product feedback. Above the sidebar is a header with the title 'My Requests' and a search bar. To the right of the sidebar is a main content area. The first item in the list is 'Case Studies Requests', which includes a summary: 'Enterprise case study focused on cost savings from moving to our...', 'Case Study Owner • Emily Nguyen', 'Large enterprises', and a small profile picture of a woman. The second item is 'Midmarket case study focused on compliance to standards', with similar details: 'Case Study Owner • Emily Nguyen', 'Mid-market', and a profile picture.

The My Requests Tab serves as a central hub for creating and tracking all your requests to other teams within the CRM. The sidebar will list all the team modules for which you've been added as a requester. Simply select the team module and click the + button to start creating a new request.

This screenshot is identical to the one above it, showing the 'My Requests' tab interface. A red arrow points to the blue '+' button located in the top right corner of the header area, indicating where users can click to start creating a new request.

To learn more about team modules and the requester role, see [Working with Team modules](#).

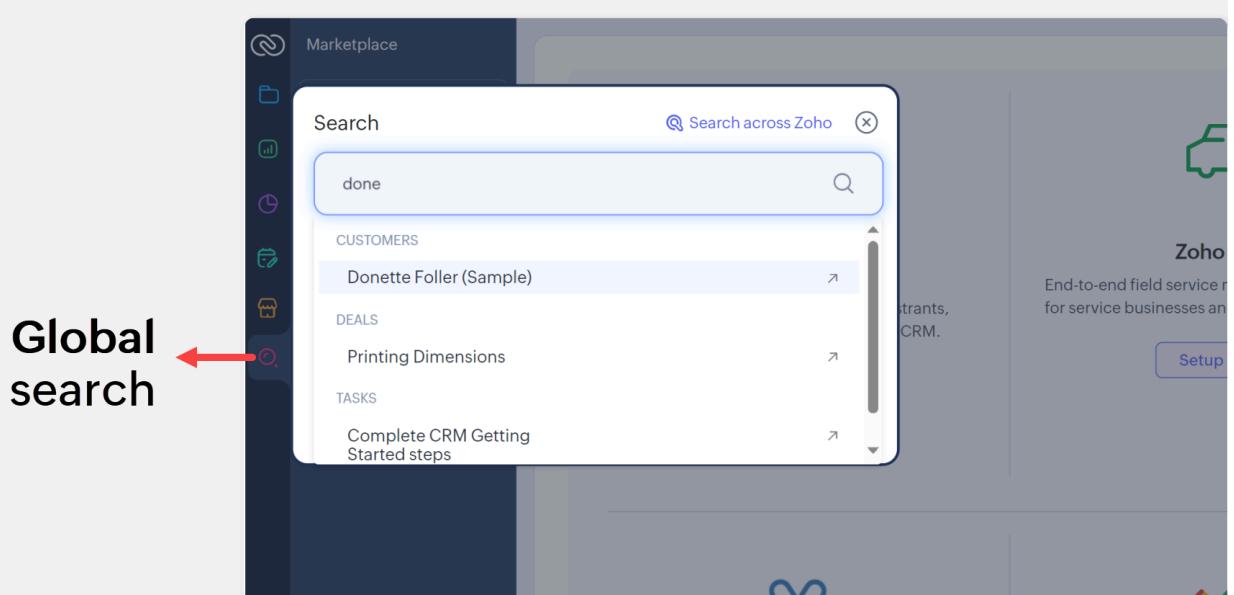
Marketplace



Though we'd like you to bring as much work as possible into the CRM, it is unrealistic to expect the CRM to be an island unto itself. Effortlessly integrate with Zoho and third party products and services through the **Marketplace tab**.

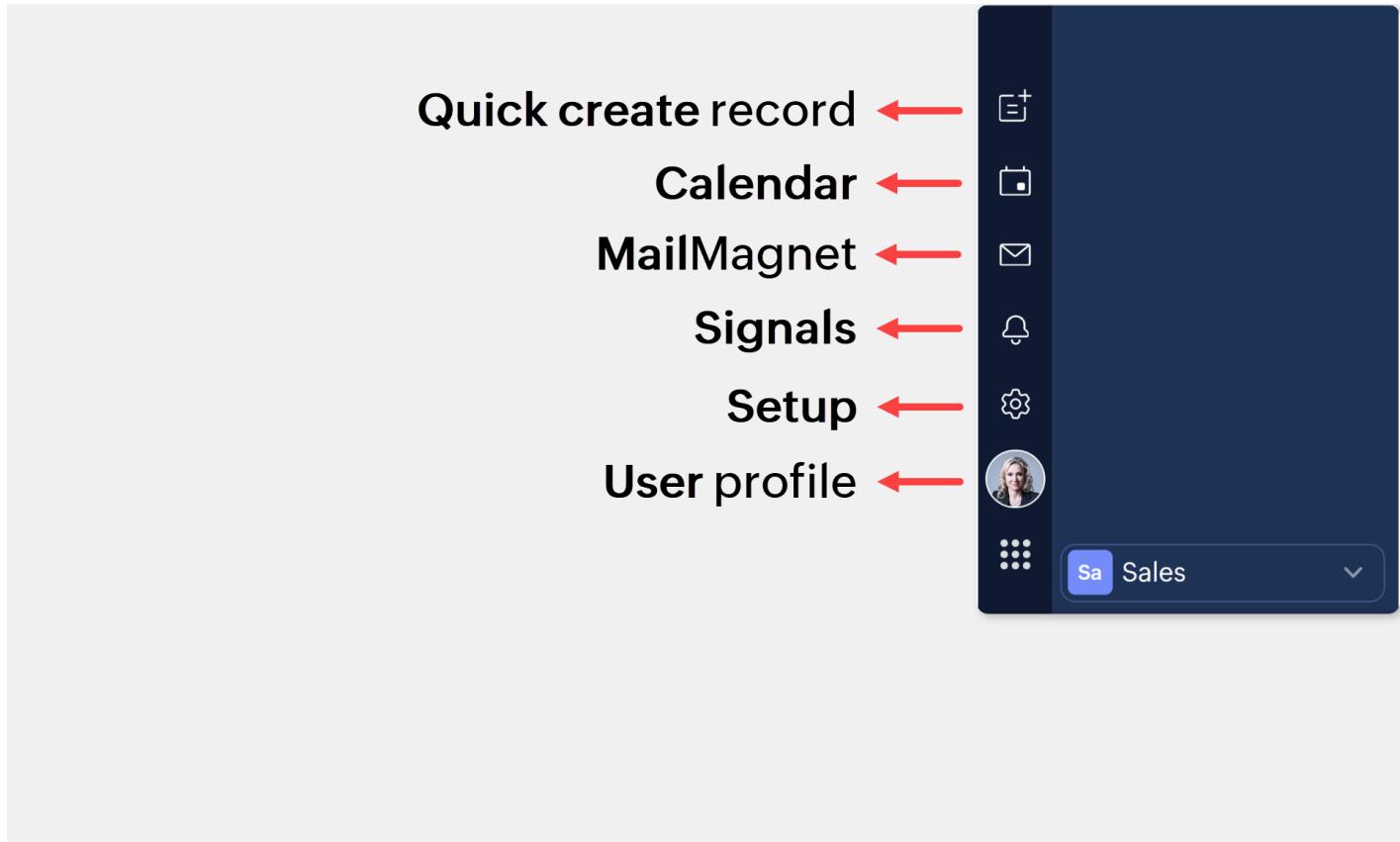
To learn more about the different options available here, please see: [Integrations](#).

Global search



This option allows you to search for records in all modules of the CRM, including across multiple Zoho products if you are using them.

Utility actions

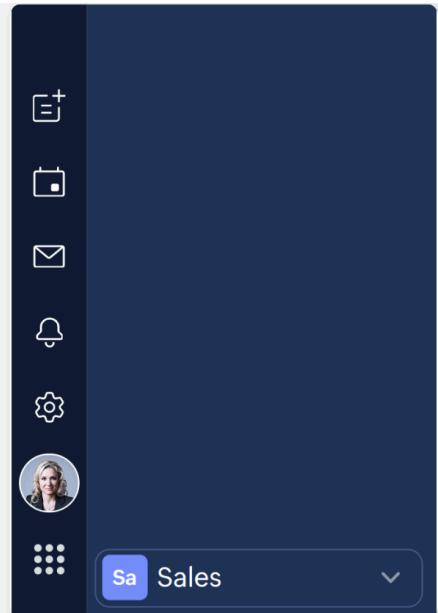


The utility options in the bottom part of the sidebar are useful for various tasks like:

- Creating a new record (only for org modules)
- Accessing your [calendar](#)
- Using [MailMagnet](#)
- Monitoring [signals](#)
- Navigating to setup. Once clicked, the different configurations can be selected from the left pane.

Profile actions

You have the option to click on the profile icon and carry out various actions associated with your Zoho CRM account.



Dark/Light mode implementation is only available only for stand alone CRM accounts for users who opted to use the new NextGen UI.

Day / Night / Auto Mode Implementation

With the new user interface, you have the option to choose between Day Mode, Night Mode, and Auto Mode, giving you full control over how you interact with the platform based on your working style and environment.

- **Day** : Lighter color palettes offer a stylish appearance enhancing the look of your CRM, making it not just functional but also visually pleasing. Additionally, you can select dark or light themes in this mode to suit your preference.

Day - Dark Mode

Total Records 31

Contact Name	Email	Phone	First Name	Last Name
Megan Clark	megan.clark@testmail.com	(555) 123-5678	Megan	Clark
Justin Martinez	justin.martinez@testmail.com	(555) 012-4567	Justin	Martinez
Emma Lee	emma.lee@testmail.com	(555) 901-3456	Emma	Lee
Andrew Robinson	andrew.robinson@testmail.com	(555) 890-2345	Andrew	Robinson
Ashley Garcia	ashley.garcia@testmail.com	(555) 789-1234	Ashley	Garcia
Joshua Thompson	joshua.thompson@testmail.com	(555) 678-0123	Joshua	Thompson
Amanda Martin	amanda.martin@testmail.com	(555) 567-9012	Amanda	Martin
Matthew Harris	matthew.harris@testmail.com	(555) 456-8901	Matthew	Harris
Jessica White	jessica.white@testmail.com	(555) 345-7890	Jessica	White
Christopher Thomas	christopher.thomas@testmail.com	(555) 234-6789	Christopher	Thomas

Day - Lite Mode

Total Records 31

Contact Name	Email	Phone	First Name	Last Name
Megan Clark	megan.clark@testmail.com	(555) 123-5678	Megan	Clark
Justin Martinez	justin.martinez@testmail.com	(555) 012-4567	Justin	Martinez
Emma Lee	emma.lee@testmail.com	(555) 901-3456	Emma	Lee
Andrew Robinson	andrew.robinson@testmail.com	(555) 890-2345	Andrew	Robinson
Ashley Garcia	ashley.garcia@testmail.com	(555) 789-1234	Ashley	Garcia
Joshua Thompson	joshua.thompson@testmail.com	(555) 678-0123	Joshua	Thompson
Amanda Martin	amanda.martin@testmail.com	(555) 567-9012	Amanda	Martin
Matthew Harris	matthew.harris@testmail.com	(555) 456-8901	Matthew	Harris
Jessica White	jessica.white@testmail.com	(555) 345-7890	Jessica	White
Christopher Thomas	christopher.thomas@testmail.com	(555) 234-6789	Christopher	Thomas

- **Night Mode : Darker color palettes minimize glare and helps reduce fatigue, creating a comfortable experience for extended hours.**

The screenshot shows the Zoho CRM interface in a dark mode theme. On the left is a sidebar with various modules: Home, Leads, Contacts (which is selected), Accounts, Deals, Tasks, Meetings, Calls, Products, Quotes, Sales Orders, Purchase Orders, SalesInbox, Invoices, Campaigns, Vendors, Price Books, Cases, Solutions, and CRM Teamspace. The main area displays a list of contacts with columns for Contact Name, Email, Phone, First Name, and Last Name. The contact list includes entries for Megan Clark, Justin Martinez, Emma Lee, Andrew Robinson, Ashley Garcia, Joshua Thompson, Amanda Martin, Matthew Harris, Jessica White, and Christopher Thomas.

- **Auto Mode :** Automatically switch between dark and light themes based on your device settings.

This screenshot shows the Zoho CRM profile menu open. It includes the user's name (Edward Mathews), user ID (89456530), and ZohoCRM logo. Below this, it shows a paid subscription for the Enterprise Edition. There are buttons for 'Day', 'Night', and 'Auto' mode, with 'Auto' being selected. A color palette for themes is also present. At the bottom, there are links for 'Need Help?' (Chat with us, Talk with us, Write to us, Community, My Account) and a 'Sign Out' button.

To Switch Between Modes :

Go to your **Profile Menu** in your CRM account and select either **Day**, **Night**, or **Auto** Mode. You can toggle between these options at any time depending on your preferences. If you select the Day mode for a lighter viewing preference you can also choose between **Day - Dark Mode** or **Day - Lite Mode**.

Total Records 31

Contact Name	Email	Phone	First Name	Last Name
Megan Clark	megan.clark@testmail.com	(555) 123-5678	Megan	Clark
Justin Martinez	justin.martinez@testmail.com	(555) 012-4567	Justin	Martinez
Emma Lee	emma.lee@testmail.com	(555) 901-3456	Emma	Lee
Andrew Robinson	andrew.robinson@testmail.com	(555) 890-2345	Andrew	Robinson
Ashley Garcia	ashley.garcia@testmail.com	(555) 789-1234	Ashley	Garcia
Joshua Thompson	joshua.thompson@testmail.com	(555) 678-0123	Joshua	Thompson
Amanda Martin	amanda.martin@testmail.com	(555) 567-9012	Amanda	Martin
Matthew Harris	matthew.harris@testmail.com	(555) 456-8901	Matthew	Harris
Jessica White	jessica.white@testmail.com	(555) 345-7890	Jessica	White
Christopher Thomas	christopher.thomas@testmail.com	(555) 234-6789	Christopher	Thomas

Auto Mode implementation

With the new user interface, you now have the option to choose between Day, Night, and Auto Mode, giving you full control over how you interact with the platform based on your preferences and working environment.

Switch to another CRM org

If you are a member of multiple CRM organizations, you can switch between them.

Amelia Burrows
User Id: [REDACTED] ⓘ

Zylker 1

Zylker Org ID: [REDACTED]

Zylker USA Org ID: [REDACTED] 2

Manage Organization

What makes the new UI great?
Write your feedback

Themes

Manage your CRM subscription

You have the ability to view the edition your organization is currently in. If you are the superadmin, you can control your subscription by selecting the **Manage** button.

The screenshot shows the Zylker CRM interface. At the top, there's a dark sidebar with various icons: a double arrow (refresh), a folder, a bar chart, a clock, a gear, a magnifying glass, and a question mark. The main area has a blue header with a user profile picture of a woman named Amelia Burrows, her User Id, and a dropdown menu set to 'Zylker'. Below the header, a yellow callout box says 'Paid subscription for Enterprise Edition' with a checkmark icon. It also includes a 'Current plan' section with a green circle containing a document icon and the text 'Enterprise Edition', and a 'Manage' button with a red arrow pointing to it. To the right of this, there's a 'Try Other Editions' link. Further down, there's a feedback section with the text 'What makes the new UI great?' and a 'Write your feedback' button. At the bottom, there's a 'Themes' section with a small preview image.

Change the theme of the interface

Personalize the CRM with our beautiful themes.

Themes in new UI



Additionally, you can access support resources and view CRM-related news. You can also go to your Zoho account or sign out from the CRM here.

Configuration Shortcuts

Configuring processes or creating new modules is made easier in the new user interface—they can now be done from the secondary sidebar itself.

What can you configure?

- Create team modules or organization modules from the Modules tab on the left.
- Create folders and associate modules from the same tab. No more navigating to the Setup menu for this action.
- Click the more option next to each module to configure different automation processes.
- Edit fields and button layouts for your modules right from the sidebar.

The screenshot shows the Zoho CRM Home screen. On the left, a sidebar lists various modules: Modules, Search, Home, Leads, Contacts, Quotes, Accounts, Invoices, Deals, Vendors, Purchase Orders, Sales Orders, Products, Price Books, Cases, Solutions, Documents, Tasks, Calls, Meetings, Campaigns, SalesInbox, and CRM Teamspace. The 'Home' module is currently selected. The main area displays a timeline of activities for the next 7 days. The first activity is 'Follow up with Lead' on Wednesday, Dec 4, at 4:00 PM, related to Chau Kitzman (Sample). The second activity is 'Get Approval from Manager' on Thursday, Dec 5, at Dec 5, related to Chapman, with status: Not Started, Priority: Low, and Contact Name: Simon Morasca (Sample). The third activity is 'Get Approval from Manager' on May 24, at May 24, related to Commercial Press, with status: In Progress, Priority: Normal, and Contact Name: Leota Dillard (Sample). At the bottom, there is a 'My Open Tasks' section.

New UI for CRM Plus and Zoho One

The new user interface is supported in **CRM Plus** and **Zoho One** as well.

The screenshot shows the new user interface for CRM plus. The top navigation bar includes 'Modules', 'Reports', 'Analytics', 'My Requests', and 'Marketplace'. A 'CRM Teamspace' dropdown is at the top right. The main area features a 'Welcome Heather Woods' header with four cards: 'My Open Deals' (8), 'My Untouched Deals' (2), 'My Calls Today' (0), and 'My Leads' (10). Below these are two sections: 'My Open Tasks' and 'My Meetings', each with a table view showing details like subject, due date, status, priority, and related contact.

The new UI in CRM plus

The screenshot shows the new user interface for Zoho One. The top navigation bar includes 'CRM', 'Modules', 'Reports', 'Analytics', 'My Requests', and 'Marketplace'. A 'CRM Teamspace' dropdown is at the top right. The main area features a 'Welcome Heather Woods' header with four cards: 'My Open Deals' (8), 'My Untouched Deals' (2), 'My Calls Today' (0), and 'My Leads' (12). Below these are two sections: 'My Open Tasks' and 'My Meetings', each with a table view showing details like subject, due date, status, priority, and related contact. There is also a 'Today's Leads' section and a 'My Deals Closing This Month' section at the bottom.

The new UI in Zoho One

Some points to keep in mind are:

- In both CRM Plus and Zoho One, the primary sidebar will be moved to the top. All options (including teamspace switcher) will be available here.

The screenshot displays the CRM Teamspace interface. At the top, there is a dark navigation bar with tabs for Modules, Reports, Analytics, My Requests, and Marketplace. To the right of the navigation bar are icons for CRM Teamspace, search, and notifications, along with a user profile picture. A red arrow points from the text "Top bar (Primary sidebar options)" down to the main content area. Another red arrow points from the text "Collapsible side bar (Secondary sidebar options)" to the left sidebar.

Top bar
(Primary sidebar options)

Collapsible side bar
(Secondary sidebar options)

- The secondary sidebar will be right next to the CRM Plus navigation bar/ Zoho One left menu. It can be collapsed to maximize your main pane.
- You can switch between the old and new UI by clicking the user profile and selecting:

- the **Switch to Old/New UI** option in CRM Plus

The screenshot shows the CRM Teamspace interface with a user profile dropdown open on the right side. The dropdown includes options for CRM Options (What's New? and Manage Organizations), Channel Status (Email, Desk Tickets, Customer Chat, SalesIQ), Subscription (Your Trial expires in 22 days, Upgrade button), Refer and Earn (Refer a friend and earn rewards, Learn more), and Need Help? (Community, Talk with us). A red arrow points to the "Switch to Old CRM UI" link under CRM Options.

- the **Switch to Old/New CRM UI** option in Zoho One

The screenshot shows the Zoho One CRM interface. On the left is a dark sidebar with various modules: Home, Leads, Contacts, Accounts, Deals, Tasks, Meetings, Calls, Products, Quotes, Sales Orders, Purchase Orders, Invoices, SalesInbox, Campaigns, Vendors, Documents (Cases, Solutions, Documents, Forecasts, Visits, Social). The 'Home' module is selected. The main area displays 'Welcome Heather Woods' with sections for 'My Open Deals' (8), 'My Untouched Deals' (2), 'My Calls Today' (0), 'My Open Tasks' (with a table showing tasks like 'Register for upcoming CRM Webinars'), 'My Meetings' (with a table showing meetings like 'Demo' and 'Webinar'), and 'Today's Leads'. A sidebar on the right shows 'Subscription' (Zoho One Trial - 10 Users, Expires on 22 Jul 2024) and 'CRM Options' (with links for 'Start Tour', 'Switch to old version', 'What's New?', and a red arrow pointing to 'Switch to Old CRM UI'). At the bottom right are 'Apps & Addons' and platform icons.

https://help.zoho.com/portal/en/kb/crm-nextgen/using-crm-for-everyone/zoho-crm-next-gen-ui/articles/nextgen-navigating-the-zoho-crm-interface#The_Main_Pane