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FOR

# DUMMIES®

## **Learn to:**

- **Make the most of Zoho's free, Web-based productivity tools**
- **Maximize Zoho's database, invoice, and scheduling tools**
- **Communicate and chat with Zoho Mail**
- **Collaborate online with Zoho Writer**

**Steve Holzner, PhD**

*Author of Joomla! For Dummies*





**Zoho<sup>®</sup>**  
FOR  
**DUMMIES<sup>®</sup>**

**by Steve Holzner**



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**Steve Holzner** is the award-winning author of many books, and he specializes in online topics and applications like Zoho. He's been working with Zoho since it first appeared. He's been on the faculty of both MIT and Cornell University.



## ***Dedication***

To Nancy, of course!

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# Introduction

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**Z***oho* — the free suite of online productivity applications — offers a fantastic set of resources for anyone with Internet access. You can use a state-of-the-art word processor, spreadsheet, database system, or any of many other applications that Zoho offers. Those applications are as powerful as any you'll find that you install on your computer.

And the best part is that Zoho is free (with the exception of some levels of advanced business computing). As a result, Zoho has taken off in a big way, gaining millions of users. Zoho is part of the *cloud* computing initiative, where applications and your data stay online. You can access those applications from anywhere there's an Internet connection, and you don't have to worry about installing new versions.

## *About This Book*

This book is your guide to Zoho. As great as Zoho is on software, it's not quite so great on documentation.

Users will find the Zoho help files very spotty. Some applications have no help files at all, some only have frequently asked questions (FAQ) lists, and others rely on interactive forums.

That's where this book comes in. Here you find the documentation that's missing from Zoho. There's plenty of stuff here that you won't find anywhere else.

## *Foolish Assumptions*

You won't need anything besides a browser and an Internet connection to use this book. Zoho will do the rest as far as the technical aspect goes.

On the other hand, this book assumes that you have a few basic skills: for example, the basics of working with a word processor. You don't have to be an expert at any of the applications in this book, but when it comes to basic skills that most people have already been exposed to — such as clicking the **B** icon to make text bold — I don't spend a lot of time on such details because nearly everyone already knows them.

In other words, this book is intended to bring you up to speed on Zoho without wasting a lot of time on basic office suite skills.

## *How This Book Is Organized*

This book is organized into parts, with each part covering some area of Zoho. Here's what you find in this book.

### *Part I: Working with Documents*

This part gets you going with Zoho, explaining how to create documents in depth. Here's what's in this part:

- ✓ **Zoho Writer** is Zoho's word processor, and it's nearly as powerful as any you'll find anywhere.
- ✓ **Zoho Show** is the app to use to create exciting slide shows that you can use when giving presentations.
- ✓ **Zoho Notebook** is Zoho's scrapbook, letting you clip Web pages, images, text, audio, video, and more from the Internet.

### *Part II: Scheduling and Communicating*

In this part, you get a guided tour of Zoho's scheduling and communicating applications. Here's what's in this part:

- ✓ **Zoho Planner**, just like any other organizer, allows you to schedule your life. You can store addresses, to-do lists, appointments, and more.
- ✓ **Zoho Mail** is Zoho's deluxe e-mail system, and it gives you all the features you'd expect.

### *Part III: Managing Data*

This part is for you if you like to crunch data. Here's what you find:

- ✓ **Zoho Sheet** is the Zoho spreadsheet application. Not only can you use it to do all you can on other spreadsheet applications, but you can also use formulas and functions to make super-powerful spreadsheets.

- ✓ **Zoho Reports** is the database system. Store your data in this application and view it many different ways, or use Structured Query Language (SQL) to work with that data.

## *Part IV: Using Zoho for Your Business*

Zoho contains a number of applications designed for businesses, and here's what you find in this part:

- ✓ **Zoho Projects** keeps your team on track by coordinating a project's tasks and milestones among all team members.
- ✓ **Zoho Invoice** allows you to create invoices to bill your customers.
- ✓ **Zoho CRM** is the customer relationship management system you can use to track everything from potential customers to sales orders.

## *Part V: The Part of Tens*

In this part, you see two collections of ten important resources available for Zoho: the top ten Zoho help resources and the top ten online Zoho tutorials.

## *Icons Used in This Book*



The Tip icon marks tips and shortcuts that you can use to make everything you're doing with Zoho easier.



Remember icons mark the information that's especially important to know. To siphon off the most important information in each chapter, just skim through these icons.



The Warning icon tells you to watch out! It marks important information that may save you headaches. There are plenty of pitfalls with any applications as powerful as the ones you find in Zoho, so be sure to pay special attention to these warnings.

## *Where to Go from Here*

Zoho is huge, and you don't need to start at any particular point. The same is true of this book: You can jump in anywhere you want. So pick a chapter and dive in! (Chapter 1 covers how to create your Zoho username and password, so that may be a good place to start.)

# Part I

# Working with Documents

The 5<sup>th</sup> Wave

By Rich Tennant



"I love the way Zoho Writer justifies the text in my resume. Now if I can just get it to justify my asking salary."

## *In this part . . .*

**T**his part gets you started with Zoho, covering the most essential applications for creating your own documents.

Zoho Writer is the Zoho suite word processor — a super-popular application that offers plenty of power.

Zoho Show enables you to create slide show presentations. You can add graphics, text, images, and more to your presentations and share them with an audience or online.

Zoho Notebook is the scrapbook of the Zoho suite. Notebook is a handy app with which you can collect just about anything you find online: text, images, video, audio, and even whole Web pages.



# 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
- 

**W**elcome 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](http://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.

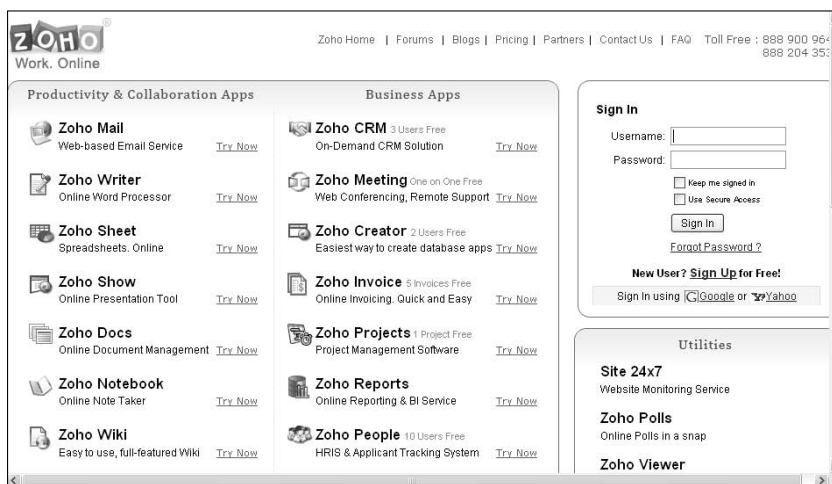
Zoho is all about *cloud computing* — that is, storing your data online for use with online applications. No longer do you need to be tied to older software that hasn't been updated on your computer. In fact, you don't even have to run the application on your computer at all — it runs in the “cloud.” 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](http://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](http://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](mailto: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=Jkqxo8C5OMFe9Uvil7xnuB1T2H28\\*Hlte2P\\*14e.nm\\*9qag41TWWxDVik0BjjK.6FNEzdfLhUz\\_sn3hz3EMVGAzMb\\*9xrKGaQOGbG3nFWY-](https://accounts.zoho.com/confirm?DIGEST=Jkqxo8C5OMFe9Uvil7xnuB1T2H28*Hlte2P*14e.nm*9qag41TWWxDVik0BjjK.6FNEzdfLhUz_sn3hz3EMVGAzMb*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>.

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## *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 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 Blogs Forums FAQ Logout [sholzner]

**Zoho Services**

[Upload your photo]

[Zoho Services](#)

[Personal Information](#)

[Contacts](#)

[Groups](#)

[My Email IDs](#)

[Preferences](#)

[Password](#)

**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 service
- Zoho Share** Centralized Public Repository
- Zoho Projects** Project Management
- Zoho Chat** Instant messaging and group chat tool

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.