Zoho **Writer** · Zoho **Sheet** · Zoho **Show** · Zoho **Notebook** · Zoho **Wiki** · Zoho **Sh**
Projects · Zoho **CRM** · Zoho **Invoice** · Zoho **Meeting** · Zoho **Creator** · Zoho **P**

ZOHO

4 EVERYONE

Work. Online

"Whether you are a newbie to Zoho or a regular user, this is a great
informational resource. Zoho has a broad set of apps with deeper
functionality, and this book does a great job explaining them in detail.
I highly recommend this book."

—Raju Vegesna, Zoho Evangelist

Nancy Conner

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Zoho® 4 Everyone

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Introduction

Zo-*who?* Getting to Know Zoho

Never heard of Zoho? You will. Zoho has been around only since 2005, but in that time it's launched a complete suite of business- and productivity-related applications—from Writer, its word processor and first program, to CRM, a sophisticated tool for managing customer relationships.

Zoho's name comes from a play on SOHO, which stands for *small office home office,* and the SOHO market was one of the company's first targets. As word spread, and as Zoho released more applications, small-to-medium businesses showed interest. And large enterprises weren't far behind. In summer of 2008, Zoho's millionth customer signed up.

What's the buzz about? In a nutshell: sharing, collaboration, and affordability. Because Zoho offers software as a service over the Internet, you can access your applications (and their documents, data, and records) from anywhere you can connect to the Internet and use a web browser to sign in. Storing documents and data online also makes it easy for you to share, publish, and collaborate with others. So, for example, when your team members are putting together a report or a PowerPoint-style presentation, they can work on it anytime, from anywhere—several people can work on the document at once, updating a single copy in real time.

As for affordability, all Zoho services are free, or have a free version you can try. Business applications have different pricing structures for different subscription levels, so you're never paying for more than your business actually needs.

Info 4U A note about security: Zoho knows how important it is to keep your data safe and private. Zoho locates its servers in super-secure datacenters behind sophisticated, state-of-the-art firewalls. Servers are regularly checked to prevent vulnerabilities and are constantly scanned to protect from viruses and other suspicious traffic. In addition, your data is backed up daily on multiple servers at multiple locations. How does that compare to your desktop?

A Quick Overview of This Book

Zoho 4 Everyone is designed to be what its name implies: a book for anyone and everyone who's interested in learning how to use Zoho's online programs. Whether you're looking for a free, easy-to-use online word processor to write your memoirs or a suite of productivity tools for your business, this book has something for you. Even if you're new to web-based applications or you're still learning your way around keyboard, *Zoho 4 Everyone* will get you up to speed in using Zoho's most popular programs.

This book is organized into parts, and each part groups programs by what they do: create and organize documents and slideshow-style presentations, track data, communicate and keep track of your to-dos, meet and collaborate online, and streamline your business processes. This section describes how the book is put together.

Part I: Documents and Presentations

Part I is all about information: writing documents and reports, adding content to a virtual note-book, and communicating your ideas in a slideshow format. In Part I, you'll find these chapters:

- **Chapter 1: "Have Your Say with Zoho Writer"**—Writer is Zoho's word-processing program. Because your documents are stored online, you have access to those documents wherever you have a web browser and Internet access. But you can also work on your documents when you're not connected to the Internet and then sync them with Writer when you're back online. If you've never tried a web-based word processor, you'll be surprised at the way Writer steps up to the job, letting you format documents, use templates, and insert images, links, and tables—pretty much everything you expect and need in a word-processing program.

- **Chapter 2: "Zoho Notebook: Clip, Snip, and Organize"**—Notebook is an online program that lets you gather and organize different kinds of content—text, images, audio, and video—and then easily share that content with others.

- **Chapter 3: "Presenting…Zoho Show"**—A presentation is a slideshow, similar to those made with Microsoft's PowerPoint. Presentations are meant to be shared, and Show makes it easy for you to do just that. With Show, there's no need for your audience to be in the same room, because you can run your presentation over the Web.

Part II: Spreadsheets and Databases

Everybody needs to keep track of something. Whether you're keeping the family to a monthly budget, cataloging your stamp collection, or updating your business's inventory, spreadsheets and databases have become indispensable tools for life in the twenty-first century. This part of the book has chapters that cover these data-management tools:

- **Chapter 4: "Track Data with Zoho Sheet"**—Zoho's spreadsheet program lets you organize, analyze, and store your data in a single, secure, easy-to-access location. For power users, Sheet also offers advanced features such as recording macros and creating pivot tables.

- **Chapter 5: "Zoho Reports: Online Databases and Reports"**—Use this online database to enter data and use it to create reports in the form of charts, pivot tables, and summaries (and that's just for starters) by simply dragging and dropping. Because the data is stored on the Web, your whole team can access that information from anywhere: on the road, at home, or at a far-flung branch office.

- **Chapter 6: "Do-It-Yourself Applications: Zoho Creator"**—Who said you need to know how to program to design a database? With Zoho Creator, if you know how to use a computer mouse, you can create a database of your very own. Design one or more forms, and then use those forms to capture data and view it in different ways.

Part III: Communication and Scheduling Tools

A big part of the attraction of web-based applications is the ease of communication and sharing that the Web allows. This part of the book focuses on applications that let you communicate with others and share your schedule:

- **Chapter 7: "Zoho Mail: Web Mail Redux"**—If you've tried just one web-based application, chances are you've tried a web-based email program, such as Hotmail or Gmail. After you give Zoho Mail a try, you're likely to make it your email program of choice. Zoho Mail lets you organize your email messages in a way that makes sense to you: folders, labels, or both. It also integrates seamlessly with other Zoho applications.

- **Chapter 8: "Instant Communication with Zoho Chat"**—Chat is Zoho's instant-messaging (IM) program, which you can use to send and receive messages with any of your contacts who are online: friends, family, coworkers, business contacts, and more. Unlike some other IM programs, there's no software to download, so you can chat from any computer with a web browser and an Internet connection. Chat one on one or in groups, and save a transcript of the conversation to read later.

- **Chapter 9: "Zoho Planner: Your Online To-Do List"**—Keep yourself organized with this simple, streamlined program that lists your upcoming events, tasks, and appointments as to-dos and lets you share them with others. If you tend to be forgetful or are always running late, you'll appreciate Planner's automatic email reminders.

Part IV: Meeting and Collaboration Tools

The whole point of online applications is how easy they make it to collaborate. This part of the book covers Zoho's state-of-the-art collaboration tools:

- **Chapter 10: "Zoho Meeting: Web Conferencing Made Simple"**—Online meetings are all the rage—not because they're fashionable, but because they're convenient. Zoho Meeting lets you schedule and run online meetings through your web browser. Participants can join immediately—there's no special software for them to download and install. Zoho Meeting works with Skype, a service that lets you make free voice calls over the Internet, to add voice conversations to the meeting.

■ **Chapter 11: "Build Collaborative Sites with Zoho Wiki"**—A *wiki* is a collaborative website; when you create a wiki, you can make it your own personal website, or you can invite people to work on it with you. So a class can work together to create a group website on, say, saving the whales; a family can share photos, memories, and news; and a business team can create a site dedicated to its current project. Zoho Wiki works with other Zoho services, such as Writer and Show, making it easy for you to fill up its pages.

Part V: Apps for Business

You can use any of Zoho's applications for your business, but this part of the book focuses on those designed to meet specific business needs:

■ **Chapter 12: "Manage Customers with Zoho Invoice and Zoho CRM"**—Whether you're a self-employed consultant or work for a large company, business is all about keeping your customers happy—and getting paid. And that's what these two programs are designed to help you do. Invoice is a good choice for small-to-medium businesses looking for a way to streamline and track their invoicing procedure. CRM is for companies looking for an all-in-one customer-relationship management solution—from launching a marketing campaign, to following up on leads, to closing the sale, to processing payments.

■ **Chapter 13: "Keep the Team on Task with Zoho Projects"**—Managing a project is a complex set of overlapping objectives, tasks, and deadlines. Whatever the project, if you're managing it, you have to assemble a team, assign roles and tasks, create a document library, set up meetings, and keep an eye on approaching deadlines. That's a lot of juggling, and Zoho Projects helps you keep all the balls in the air by managing all these activities with a single application.

■ **Chapter 14: "Zoho People: Your Online HR Office"**—Zoho People provides a common-sense workflow for managing your organization's hiring process—from posting a new job opening, to identifying qualified candidates through making an offer and bringing the new employee on board. But that's not all—People also has tools for managing current employees, including a self-service page where employees can update their information, request time off, sign up for training, and so on. People is customizable, so you can be sure it fits your organization's needs.

Info 4U   Zoho is responsive to user feedback and feature requests, which means Zoho frequently updates its applications. Because of these frequent updates, you may find that some of the pages and steps on the live applications differ from what you see in this book.

What Are You Waiting For? Signing Up and Signing In

When you sign up for a Zoho account, you get access to most of Zoho's applications with just one user ID and password. It's called *single sign-on*, and it saves you both time and the effort of remembering multiple passwords. (Some of the business apps, such as CRM, still require you to set up an account, although you can use the same username and password for that account as you use for all your other Zoho apps.)

To sign up for a Zoho account, a good place to start is Zoho's home page: www.zoho.com. (You can also create an account from the home page of any individual Zoho service, such as

wiki.zoho.com or writer.zoho.com or mail.zoho.com.) On the right side of the page, click the Sign Up link to open the page shown in Figure I.1. It takes just a little information to create your account:

- ■ **Username**—The ID you want to use with your Zoho apps.
- ■ **Email address**—Where Zoho can send the confirmation email.
- ■ **Password/Confirm Password**—Type in a hard-to-guess password (it's best to use a combination of letters and numbers) to gain access to your account.
- ■ **Image text**—To prove you're a person and not some kind of web bot, type the sequence of letters and numbers into the text box.
- ■ **Agreement**—Click the links to read Zoho's Terms of Service and Privacy Policy. If you agree, check this box.
- ■ **Newsletter**—If you want Zoho's newsletter delivered to your email inbox, check the box that subscribes you.

Look good? Then click Sign Up. Zoho emails you a confirmation notice; click the link in the email, and you've got a Zoho account of your very own.

Figure I.1
Fill out this short form to create a Zoho account.

Signing In to Zoho Through a Google or Yahoo! Account

If you have a Yahoo! or a Google account, you can use that account to sign in to Zoho. This is helpful if you want to take a look at a few Zoho services before you decide whether to sign up,

but you also get full access to Zoho services when you sign in this way. So if someone shares a Zoho Writer document with you, for example, you don't have to create a whole new Zoho account to access it—you can sign in through your existing Google or Yahoo! account.

When you sign in to Zoho through your Google or Yahoo! account, you give Zoho temporary, limited access to your account. Zoho doesn't store your password or poke around in your personal documents.

To sign in using your Yahoo! or Google account, go to Zoho's home page at www.zoho.com (or go to the home page of any Zoho service). In the Sign In box on the right side of the page, look for where it says Sign In Using Google or Yahoo. Click Google or Yahoo!, depending on which service you use.

If you're not currently signed in to the service you clicked, a page opens asking for your user ID and password. Type these in and click the Sign In button. When you're signed in, another page opens, asking for your permission to grant Zoho limited access to your account to log you in. Click I Agree (in Yahoo!) or Grant Access (in Google) to sign in to Zoho.

Getting Help with Zoho Applications

In the Zoho suite of services, different applications have different levels of help. Some have an FAQ (a list of frequently asked questions), others have a Help wiki, still others have a phone number you can call for live assistance, and some leave you more or less on your own (so it was smart of you to pick up this book).

If you can't find a Help link in a Zoho program, or if the FAQ for that program doesn't answer your question, the best place to try is one of the Zoho forums. Each Zoho app has forums for feedback, feature requests, bug reports, and announcements. Most apps have a Forums link at the top of their pages. If you don't see a link, you can get directly to the Forum page for that app by pointing your web browser to forums.zoho.com. Zoho services are listed along the right side of the page; click the one you want, and then use the upper-right Quick Search box to look for keywords related to your issue.

To ask a question, choose a particular forum from the Forums Categories list on the right. On the page that opens, click New Topic to open a form where you can ask your question and add it to the ongoing discussion.

Presenting…Zoho Show

Slideshows are a powerful way to make your points during a meeting. Used to be, you'd have to get everyone into the same room at the same time to show your presentation. And with busy schedules and people on the road, that could be hard to do.

Zoho Show solves that problem. Create your slideshow and store it on the Web. When it's time for that meeting, you can give the presentation over the Internet—so if Tom is on the road, Betty's in a branch office, and Michelle is working from home, they can all watch your presentation in real time. You can even publish the presentation so that others can go through it on their own time, at their own pace.

Creating a Presentation

To get started with Show, point your web browser to show.zoho.com (and log in if you're not already signed in to your Zoho account). When you first open Show, you see a home page that looks like the one in Figure 3.1. This is the place for creating presentations, whether you start a brand-new presentation using Show or import an existing presentation.

Starting from Scratch

To create a brand-new presentation in Show, start on the Show home page (see Figure 3.1). Click the Create a New Presentation link. (If you've already added a presentation or two, click the Create New button in the upper-left part of the page.) This opens the Create New Presentation page shown in Figure 3.2. Here's where you tell Show the basics so it can get started on your presentation:

- **Presentation Name**—After you've created a bunch of presentations, you want it to be easy to find the one your looking for, so give your presentation a descriptive name.
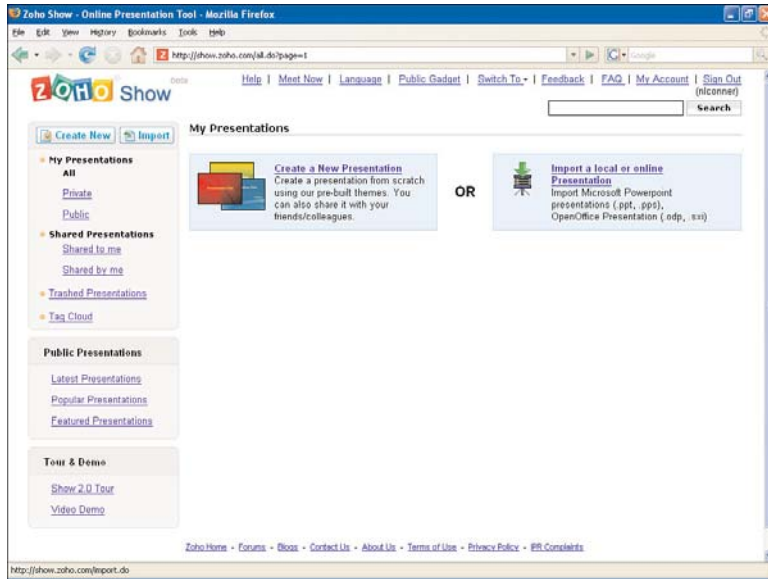
Figure 3.1
Start creating presentations on the Zoho Show home page.

- ■ **Description**—This section gives you the option of writing a lengthier description of your presentation, who it's for, its purpose—whatever might be helpful.
- ■ **Tags**—In Show, tags work just as they do in Zoho Writer (see Chapter 1, "Have Your Say with Zoho Writer"). They help you organize your presentations by labeling them. Tagging a presentation is optional, and you can always add tags later.

Info 4U   As you type in your presentation's name, Show fills the same text into the Tags text box. You can keep, edit, or delete the Tags text, as you prefer.

Tip 4U   Use tags to find related presentations. On the Zoho Show home page, click the Tag Cloud link (on the left). This shows all the tags you've added to your presentations. The more presentations that are associated with a tag, the bigger the tag appears in the cloud. Click any tag to see a list of the presentations tagged with that word.

- ■ **Choose Theme**—In Show, a *theme* is a design template for your presentation. Zoho offers dozens of predefined themes, from plain to jazzy, so you can give your presentation the feel you want it to have.

After you've set up the presentation, click Start to create your presentation.
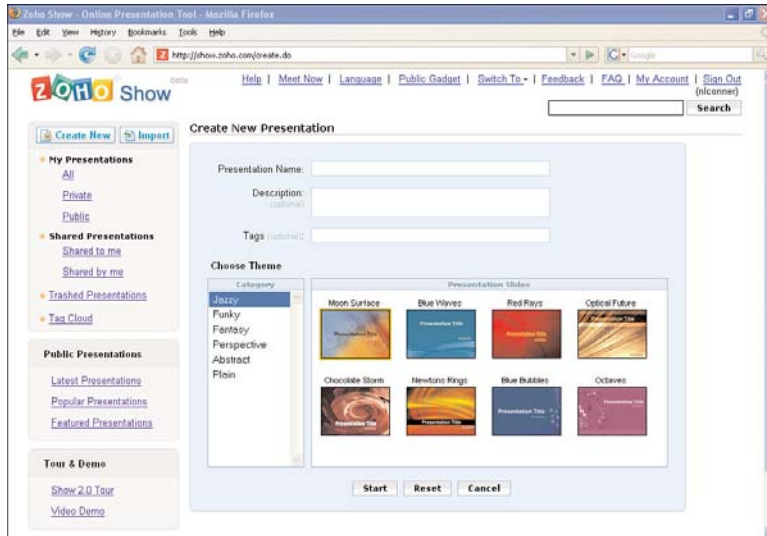
Figure 3.2
When you create a presentation from scratch, Show collects some basic information to get you started.

Importing an Existing Presentation

You don't have to start from square one to get a presentation into Show; you can import existing presentations and work on them in Show. Presentations you import must be either on the Web or stored on your computer. Either way, the import process is fast and easy.

Info 4U To import successfully into Show, a presentation file must be 10MB or smaller.

Importing a Presentation from Your Computer

Show can handle presentations that you created using Microsoft PowerPoint (files that end with the extension .ppt or .pps) or OpenOffice.org Impress (files that end with the extension .odp or .sxi).

To import a file, go to the Show home page at show.zoho.com. (Make sure you're signed in to your Zoho account.) If you don't currently have any saved presentations, click the Import a Local or Online Presentation link; if you've already got one or more presentations in Show, click the upper-left Import button. Either way, Show opens the Import Presentation page, shown in Figure 3.3.

Tip 4U If you're already working on a presentation, you can import a new presentation by clicking the Import link at the top of the page.
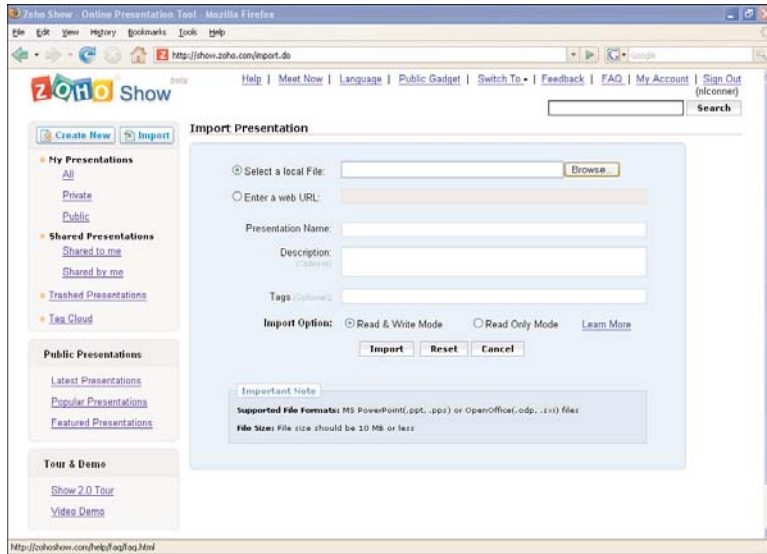
Figure 3.3
Whether a presentation is displayed on the Web or stored on your computer, you can import it into Show.

To import a PowerPoint or Impress presentation, make sure the Select a Local File radio button is turned on. (Zoho preselects it for you.) Click the Browse button; a new window opens, where you can find the file you want on your computer. Select that file and click Open to make the filename appear in Show's Import Presentation page.

Show automatically fills in the file's name and uses that name to tag the presentation, but if you want, you can change the presentation's name, its tag, or both. Just click inside the Presentation Name or Tags box and edit as you like. You can also write an optional description of the presentation.

You've got one more decision to make before you import the presentation, and that's in the Import Option section: In Show, do you want the presentation to be Read Only or Read/Write? If a presentation is done and you only want a copy of it in Show, select Read Only mode. If you know you're going to be doing more work on the presentation, select Read/Write mode.

When you've made your choices, click Import to upload a copy of the presentation into Show. Zoho imports the presentation and sends you an email to confirm that the import has taken place.

Importing a Presentation from the Web

To import a presentation that has been published somewhere on the Web, you need to know the URL (that is, the web address) of the presentation. The easiest way to get this is to go to the presentation and then copy what's in your web browser's address bar.

Next, go to the Show home page and click Import. The process of importing a presentation from the Web is almost identical to importing a presentation from your computer (see the previous section). The main difference is that, when you're importing from the Web, you turn on the Enter a Web URL option on the Import Presentation page (see Figure 3.3) and paste or type the presentation's URL into that text box.

When you've set up the presentation the way you want it, click Import. Show imports the presentation, adds it to the list on its home page, and emails you to let you know that the import succeeded.

Presentation Views

Sometimes you want to work on a presentation one slide at a time; other times, you want to get an overview of the presentation as a whole. And eventually, of course, you're going to want to give the presentation a trial run. As you're working on a presentation, you have the following options for viewing it:

- **Normal View**—This view displays your presentation in the optimal way for working on individual slides: The slide sorter pane on the left, the slide editor in the middle, and a right-side pane for activities such as adding shapes or tags, changing the theme, and viewing the presentation's history. This is the default view when you create or open a presentation. If you're in a different view, get back to Normal View by selecting Slide View, Normal View.

- **Master View**—If you want to change the look, size, or style of the standard fonts in a presentation, switch to Master View (Slide View, Master View). This view shows two master slides: Title Master and Slide Master (see Figure 3.4). Any changes you make to these master slides automatically apply to all the slides in the presentation.

- **Sorter View**—Shown in Figure 3.5, Sorter View gives you an overview of your presentation as a whole. From here, you can easily move slides around. To switch to Sorter View, select Slide View, Sorter View.

Tip 4U To make a fast switch from Sorter View back to Normal View, double-click the slide you want to work on, and it opens in Normal View's slide editor.

- **Slideshow**—Before you share your presentation, you'll want to give it a couple of run-throughs to make sure everything looks okay. To view your presentation as a slideshow, click Slideshow in the top row of toolbar buttons. This previews the slideshow in a new window. And, of course, if you're giving an onsite slideshow (as opposed to one that brings together remote users from different locations), this is the button to click to start your show.
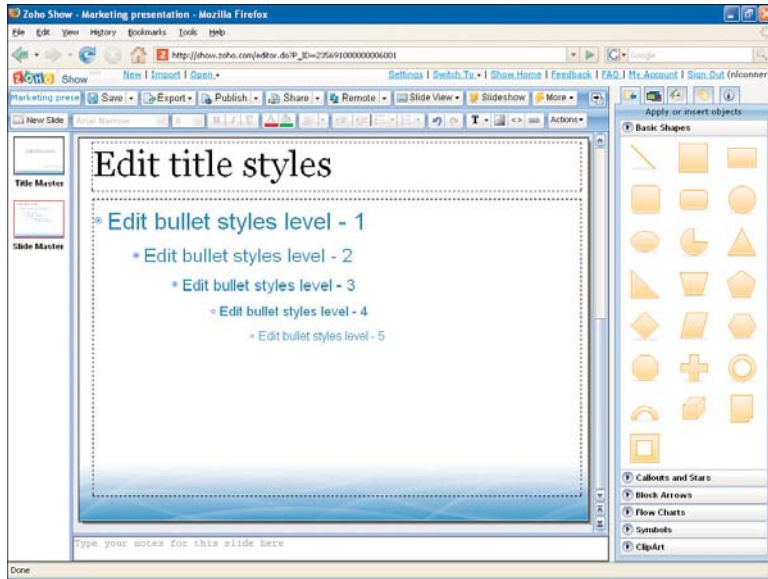
Figure 3.4
Tweak the formatting of all slides in a presentation using the master slide.
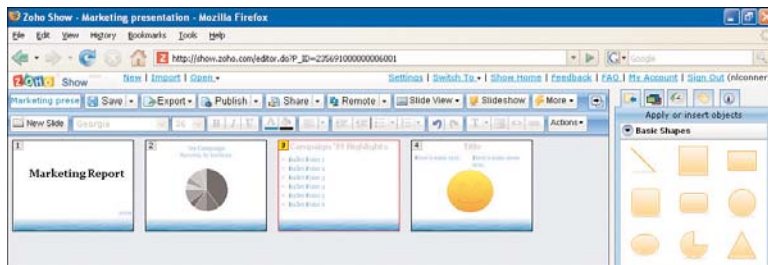
Figure 3.5
Sorter View shows thumbnails of all the slides in your presentation.

Editing a Presentation

Whether you're adding content to a shiny new presentation or editing an existing one, you work in the presentation editor, as shown in Figure 3.6. The presentation editor has three main areas: a pane on the left that shows thumbnails of your presentation's slides, a center area where you can edit individual slides, and a pane on the right that lets you do the following things:

- Add shapes or clip art to a slide.
- Change a presentation's theme.
- View the presentation's history (that is, the different versions you've saved).

- View or work with a presentation's tags. (See the upcoming section on working with tags.)
- Get information about your presentation.
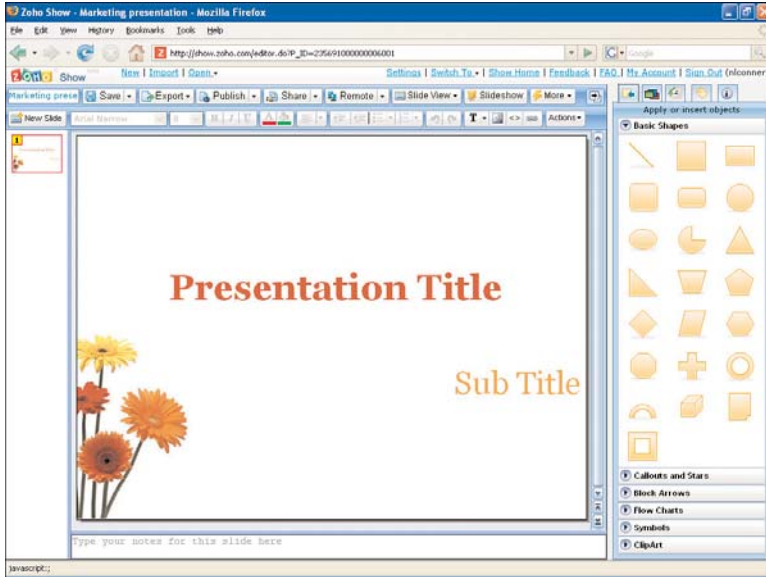
Figure 3.6
Show's presentation editor is where you add slides and content to your presentations.

Adding Slides

When you first create a new presentation, Zoho helps you out by inserting a blank title slide at the start. (As Figure 3.6 shows, this slide has placeholders for a title and subtitle.) But a presentation consisting of just one slide is not very useful. To add a new slide, click the New Slide button on the left end of the Formatting toolbar. Show opens the dialog box shown in Figure 3.7.

Info 4U When you click the New Slide button, Show inserts the new slide right after the one that's currently selected.

The Create New Slide – Select Slide Type dialog box offers these formats for blank slides:

- **Blank Slide**—No predetermined formatting here, so you can go to town adding content wherever you want.
- **Title Slide**—This format has text boxes already inserted and formatted for a title and subtitle.
- **Title with Text**—There's a slot for a title at the top of the slide and a text box for normal-sized text below it.

■ **Title with Points**—This is just like the Title with Text format, except that the lower text box is preformatted as a bulleted list.

■ **Two Text Blocks**—Below the titles are two text boxes, side by side. Use this kind of slide when you want the slide's text to appear in columns.

Click a slide type to select it; then click Create Slide to insert a blank slide with that format into your presentation.
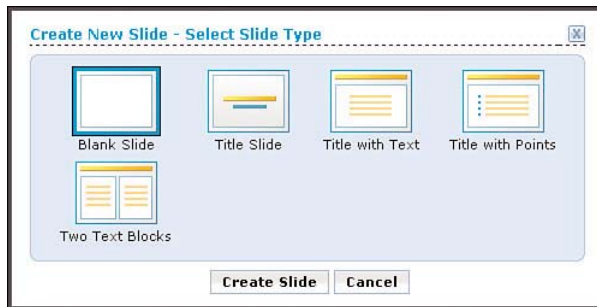
Figure 3.7
Choose a format for each new slide you add to a presentation.

Working with Text

When you create a new slide, such as the title slide shown in Figure 3.6, that slide already has preformatted text boxes placed on it. (The exception, of course, is when you create a blank slide, which has no text boxes already inserted.) These text boxes help you put content on the slide without having to worry about font, color, size, or placement. However, you can change any of these as you like, as this section explains.

Adding Text to a Slide

When you've added a slide that has some text boxes (you'll know because the slide has placeholders such as Title or [Insert your text here]), click the placeholder text. The placeholder changes to a text box like the one in Figure 3.8, so you can start typing. At the same time, Show activates the formatting buttons above the slide editor.

You're not limited to Show's placeholders for putting text on a slide. If you want to add text to a blank slide, or if you want to add a new text box to a preformatted slide, click the downward-point arrow on the Text Box button (see Figure 3.8) or right-click the slide and select Add Text. This brings up a menu of choices for the kind of text box to add: Title Box 1, Sub Title Box, Title Box 2, Text Box, or Bullet Box (for creating a bulleted list).

Whichever kind of text box you choose, Show inserts it into the current slide. Click the placeholder to turn it into a text box and then start typing. Show pays no attention to existing content when inserting the new text box, so the new text box might overlap other text boxes or graphics. You can move or resize the text boxes to eliminate this problem, as the next section explains.

Formatting buttons   Text Box button
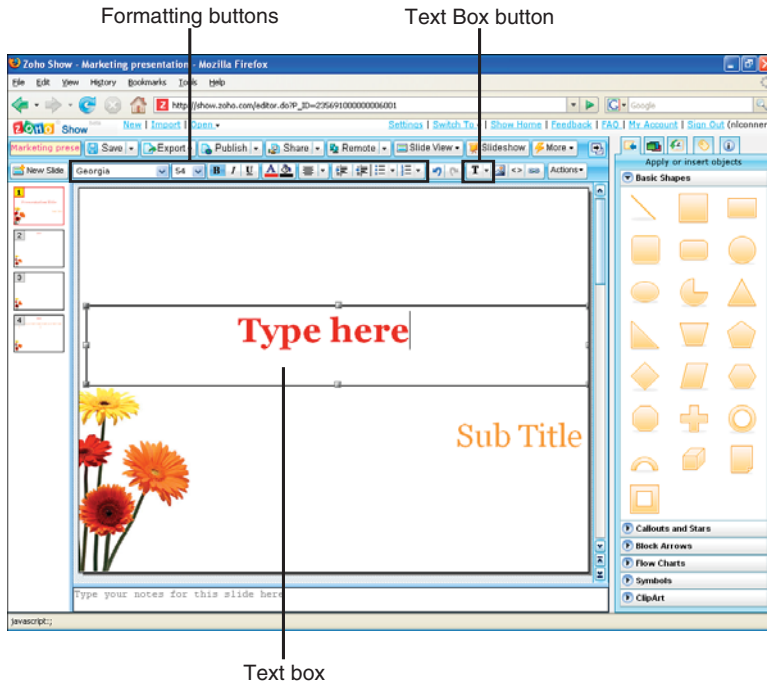
Text box

Figure 3.8
To replace a placeholder with your own text, click the placeholder to turn it into a text box and then start typing.

Resizing or Moving a Text Box

You're not stuck with Show's standard positioning of text; you can move text around on the slide. You can also make a text box larger or smaller to get your text looking just the way you want—maybe you want it to stretch all the way across the screen or be limited to a narrow column.

To move a text box, click the text it holds to make the text box visible, as in Figure 3.8. Position your cursor on the border of the text box so the cursor becomes a four-way arrow. When the cursor changes, click and drag the text box to its new location. Let up on the mouse button when you've got the text where you want it.

To resize a text box, click the text you want so the borders of the text box appear. The border has eight small squares, called *handles*, at its corners and its lines' halfway points. Click any handle and drag it to make the text box smaller or larger. As you drag, the text inside the box repositions itself, so you can see how it looks on the slide. When the text looks good, let up on the mouse button to apply the new text box size.

Formatting Text

To format text, click the text to reveal the text box and activate the formatting buttons above the slide editor. Then select the text you want to format. (Press Ctrl+A or Cmd-A to select all the text in the box.)

If you've worked in Writer, the text buttons will be familiar. (Chapter 1 has a list of formatting buttons and what they do.) You can change the font style, size, or color; add a background color to the text box; align text; change the indent; create lists; and more.

Tip 4U   Want your list to have a different bullet or numbering style from the standard? Click the arrow next to the Bullets or Numbering button to select from a variety of styles.

Creating Hyperlinks

When you give a slideshow, you can insert a link that opens a web page when you click it. First, make sure you know the correct URL (web address) of the web page you want to link to—the easiest way to do this is to open the web page and copy what's in your browser's address bar.

Back in Show, select the text that will hold the link and then click the Insert Hyperlink button on the right side of the toolbar. (Or press Ctrl+K for a keyboard shortcut.) The Insert Link dialog box opens. Paste or type in the URL of the page you're linking to and then click Insert. The text is now linked to the web page.

Tip 4U   If you haven't yet written the text for the hyperlink, you can do that at the same time you insert the link. When you click the Insert Hyperlink button with no text selected, just type the text into the Text to Display box, above where you paste in the URL, and then click Insert. Zoho inserts the text *and* the link, all at once.

Working with Shapes

A slideshow with nothing but text might make your points, but visually it's kinda boring. To add a little pizzazz to your slides, try adding some shapes. You can create a flow chart, emphasize important points with stars or lightning bolts, add a speech or thought bubble, and more. Show even comes preloaded with ready-to-use clip art in more than a dozen different categories.

Inserting a Shape

At the top of Show's right pane are five tabs; the leftmost one, called Shapes, is where you choose and insert a shape into your slide. Show offers six categories of shapes; click a category to see its options:

- **Basic Shapes**—Includes squares, circles, diamonds, rectangles, trapezoids, and just about everything else you may remember from geometry class.
- **Callouts and Stars**—This is where you'll find a variety of star shapes and bubbles to indicate speech or thoughts.
- **Block Arrows**—Offers quite a few styles beyond the run-of-the-mill single- or double-headed arrows.

- **Flow Charts**—Includes all the common symbols you need to create this kind of diagram: terminators, actions, processes, decision points, and more.
- **Symbols**—This is Show's "miscellaneous" category, including smiley faces, hearts, flowers, scrolls, and more.
- **Clip Art**—This is where you can browse categories ranging from animals and people, to computers and technology, to entertainment and sports (and that's just for starters) to find cartoon-like illustrations for your slides.

Whatever kind of shape or illustration you want, click the shape to select it. Then move your cursor to the approximate place on the slide where you want the shape to appear. (Don't worry if your placement isn't exact; you can move the shape later.) From there you have two options:

- Click to make a standard-sized shape appear.
- Click and drag to size the shape you're inserting.

Voilà! You've inserted a shape, and your slide looks something like the one in Figure 3.9.
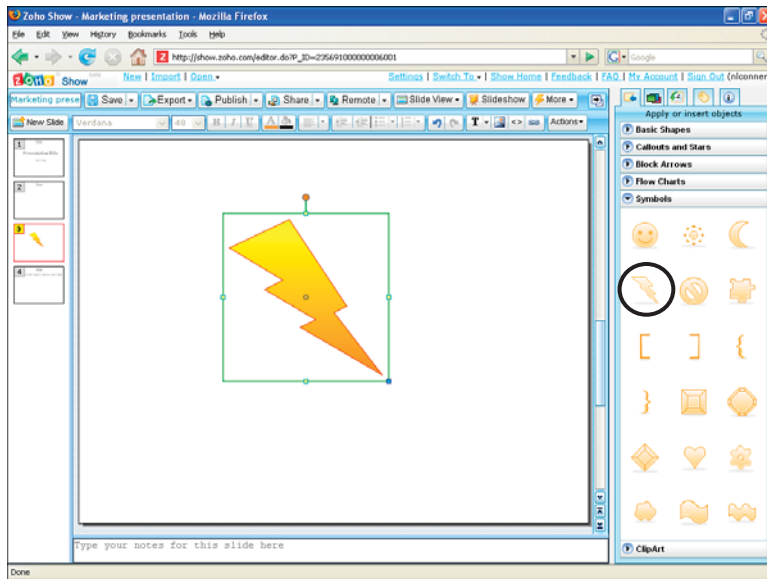
Figure 3.9
Use the right pane to insert a shape. When you select a shape, Show puts a box around it.

Tip 4U Here's a quick 'n' easy way to get a shape onto your slide: Click the shape you want, drag it onto the slide, and then let go of the mouse button to drop the shape into place.

Resizing Shapes

Often, you'll want to adjust a shape's size after you've inserted it. Piece of cake. Click the shape to select it, revealing a frame around the shape (as shown in Figure 3.9). The shape's frame has

five square handles; place your cursor on any of these handles so that the cursor becomes a double-headed arrow; then click and drag to change the shape's size.

Tip 4U To keep a shape in proportion, click and drag the handle in the lower-right corner of the shape's frame. This adjusts the shape's horizontal and vertical dimensions simultaneously.

Tip 4U Here's a keyboard shortcut for resizing objects: First, select the shape (or other object) you want to resize. Then, while holding down the Shift key, use the arrow keys to adjust the size.

Rotating a Shape

If you want a right-pointing arrow to switch around and point left, up, down, or at an angle, you can rotate that arrow to make it point exactly where you're aiming it. In fact, you can rotate any shape you insert into a slide.

When you select a shape, you see a circle connected to the top of its frame (take a look back at Figure 3.9 to see it). Put your cursor on this circle, and the cursor becomes a four-way arrow. When it does, click the mouse button and drag to make the shape rotate around its center point (which is a gray circle in the middle of the shape's frame).

Alternatively, if you'd prefer a keyboard shortcut for rotating a shape, just hold down Alt while pressing an arrow key to rotate the image.

Tip 4U To flip an image (that is, show its mirror image), select the image and right-click. From the context menu that appears, choose Properties. This opens the Properties dialog box. In this box, select Flip & Rotation and then choose Flip Horizontal or Flip Vertical, as you prefer.

Moving a Shape

If a shape isn't quite where you want it on the slide, you can move it to a new location. Doing so is as easy as selecting the shape (so you can see its frame) and then clicking the shape and dragging it to its new location.

Tip 4U Here's a keyboard trick: Select the shape you want to move and then use the arrow keys to reposition it.

Adding Images

If a picture is worth a thousand words, it's got to be worth at least a few hundred bullet points. You can insert an image from your computer or an online photo album into any slide. To do so, click the Insert Image button in the toolbar above the slide editor. This opens the Insert Image dialog box shown in Figure 3.10.
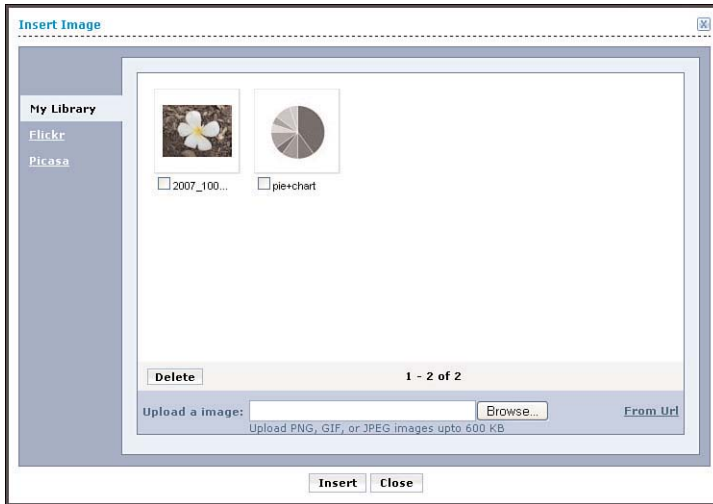
Figure 3.10
Use the Insert Image box to upload an image from your computer, insert an image you've already uploaded, or link to an online image.

The Insert Image box gives you several choices for getting pictures onto your slide.

- To transfer a copy of an image from your computer to Show, click the Browse button, find and select the image on your computer, and click Open to put the file's name and location in the Upload an Image box. Images you upload in this way must be in one of four formats—.png, .gif, .jpg, or .jpeg—and 600KB or smaller in size.

Info 4U Show may give you an error message telling you that the image is 0 bytes and couldn't be uploaded. If you see that, close the Insert Image box and then open it again. Despite the error message, your image should be there.

- To insert an image you've already uploaded, find the image you want in the Insert Image box. Check the box below the image.
- To insert an image from your Flickr or Picasa Web Albums account, look in the left part of the dialog box and click the name of your service. The first time you use one of these services to transfer images to Show, you need to configure that service to work with Show. Click the Click Here to Configure Account link and log in to your Google account (for Picasa Web Albums) or your Yahoo! account (for Flickr). You have to give permission for Zoho to access these applications, just as you do when you sign in to a Zoho app through Google or Yahoo! (see this book's Introduction for more info about that). Zoho transfers your files to Show; just check the box of the one you want to insert.

Info 4U After you've configured Picasa Web Albums or Flickr to work with Show, any new photos you've added to those sites automatically get transferred to Show when you click Insert Image and then select the service in the left side of the Insert Image dialog box.

- To transfer an image from a web location other than Picasa Web Albums or Flickr, start by finding the image and copying its URL. Most online photo services, such as Photobucket and Snapfish, have a direct link you can copy (it begins with *http*). After you've copied that link, open Show's Insert Image dialog box and select My Library from its left side; then click the From URL link. The text box changes its label to "Insert Image from URL." Paste the URL you copied into the text box. (This does *not* add the image to your Show image library; instead, it creates a link to the image.)

Whichever method you choose, click Insert to put the image on your slide. Show inserts the image, and you can work with it as you would any other object (see the previous section on working with shapes).

Tip 4U   You can also embed videos in a slideshow. Chapter 2, "Zoho Notebook: Clip, Snip, and Organize," tells how to embed videos in a Zoho Notebook page; in Show the process is similar. Copy the code that embeds the video from its source site (such as YouTube). In Show, select the slide you want, click the Insert HTML Code Snippet button, and then paste in the code and click Insert.

Sometimes, you may insert an image and then find that it's too big for the slide; the top and bottom resizing handles, for example, may not appear when you select the image. When that happens, you can resize the image using its properties. Right-click the image and choose Properties from the context menu to open the Properties dialog box. There, select Size & Position and then adjust the image's height and width manually. For example, you might make both height and width 75 percent of the original image to shrink the image while keeping it in proportion.

Copying and Pasting an Object

Sometimes you've got a great picture or chart on one slide that you want to revisit on a later slide. And that's when copying and pasting comes in handy. Copying and pasting is a piece of cake for any kind of object: text, a shape, an image—whatever. Just right-click the object. As Figure 3.11 shows, this brings up a context menu. Select Copy Object or Cut Object (as you prefer). Then move to the slide where you want to paste the object (just click it in the left pane), right-click there, and select Paste Object. Presto! The copied object magically appears.

Deleting an Object

There are two ways to delete an object from a slide (an object can be a text box, shape, image, and so on):

- Click the object to select it. From the toolbar above the editing pane, select Actions, Delete Object.
- Right-click the object and select Delete Object from the context menu (see Figure 3.11).

However you delete an object, Show doesn't ask for confirmation before it removes the object from the slide. If you delete an object by mistake, click the toolbar's Undo button to bring it back.

Figure 3.11
Right-clicking an object brings up a context menu that offers choices for working with the object.

Duplicating a Slide

You can copy a slide to use it as the basis for a new slide or to emphasize a point by returning to it later in a presentation. To make an exact copy of an existing slide, you've got a couple options:

- In the left slide sorter pane (or in Sorter View), right-click the slide and choose Duplicate from the context menu. Show inserts the duplicate immediately after the original, but you can move it (see upcoming section) to wherever you want.

- Copy the slide and then paste it where you want it. Right-click the slide you want. If you click the slide in the editing pane, select Copy Slide; if you click it in the slide sorter, select Copy. Next, choose the slide that will come before the copy you're pasting in. In the toolbar above the slide editor, click Actions, Paste Slide.

Tip 4U Another way to duplicate a slide is to copy and paste it. In the left slide-sorter pane, click a slide to select and choose Actions, Copy Slide (or right-click and choose Copy). Then click the slide just before where you want the new slide to appear; select Actions, Paste Slide.

Moving a Slide

Some people like to rearrange the living room furniture; others like to try out different arrangements of slides in their presentations. But you won't strain your back moving a Show slide: In the slide sort pane (or Sorter View), select the slide you want to move. Holding down the mouse button, drag the slide to its new location. Let go of the button to drop it in place. (When you do, Zoho automatically changes the slide numbers to reflect the new arrangement.)

Adding Notes

Presentation notes keep you on your toes and let you make sure you're not forgetting anything. During a presentation, the notes are visible only to the presenter, so nobody will think you're cheating.

In the slide editor's Normal view, just below the current slide, is a pane where you can type notes for your presentation. Just click inside the text box and type away.

Tip 4U Not enough room for your notes in that little pane? Hover your cursor over the border between the current slide and the Notes pane. When the cursor changes to a two-headed arrow, click-and-drag to resize the Notes pane.

Changing Your Presentation's Theme

When you create a new presentation, you choose a theme for it. But you're not stuck with that theme forever. You might decide, for example, that you want a lighter background color or that pink flowers don't really work with your gloomy sales report.

You change a presentation's theme using the pane on the right. Click the Themes tab (shown in Figure 3.12). From the drop-down list of themes, choose a category. Show displays all the themes in that category. Click one to apply it to the presentation. Show applies the theme and saves the presentation.
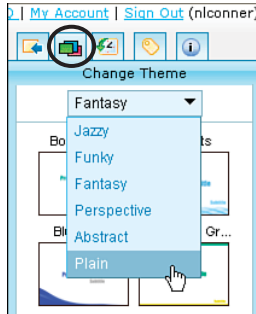
Figure 3.12
The Themes tab (circled) is where you choose a new theme for a presentation.

Deleting a Slide

If there's a slide that's just not working out, you can delete it from the presentation with a mere click or two. Right-click the slide. From the context menu, choose Delete Slide (if you're in the slide editor) or Delete (if you're in the Sorter View or pane). Show doesn't ask you to confirm the deletion—it just gets rid of the slide.

Saving a Presentation

Whether you're just taking a break or the presentation is finished, you want to be sure to save your work. You can save a copy right in Show, or you can export it using a range of file formats.

Saving a Copy

To save a copy, click the upper-left Save button. Then choose one of these options:

- **Save**—This saves a version of this presentation as it exists at this moment in time.
- **Save As**—Choose this option to save a duplicate version of the presentation with a new name. When you choose Save As, Show asks you to name the duplicate presentation. Give the copy a name and then click OK.

Tip 4U Here's another option for creating a copy of a presentation: In the upper-right part of the toolbar, select More, Duplicate Presentation. As when you click Save, Save As, Show asks you to name the presentation. When you've done that, click OK to save your new copy.

Exporting a Presentation

When you export a presentation, you save a version of it in a format that works with other programs, such as Microsoft PowerPoint or OpenOffice.org Impress. This can be helpful when you want to snazz up a presentation with some animation, or when you want to print out paper copies of your slides as a handout.

When you're ready to export a presentation, click the Export button in the top row of buttons above the slide editor. That opens a menu from which you choose the type of file you want to export:

- **HTML**—For display on the Web
- **PPT**—To open, edit, and save in Microsoft PowerPoint
- **PPS**—For PowerPoint or the PowerPoint Viewer (Microsoft's presentation viewer)
- **ODP**—To open, edit, and save in OpenOffice.org Impress
- **PDF**—To view or print the file using Adobe Acrobat

If you select HTML as the file type, your presentation opens in a new browser window. If you want to save it, do so using your web browser. (The process will vary, depending on your browser.)

If you select any of the other file types, your computer asks you where you want to save the file; you can open it using the appropriate program or save it to your computer's hard drive.

Tip 4U At this writing, you can't print a presentation directly from Zoho Show. If you want to print a presentation, export it as a PDF, open it in Adobe Reader or Adobe Acrobat, and then print from there.

Deleting a Presentation

If you're done with a presentation and you know you'll never use it again, you can delete it from Show. The easiest way to do this is to open the Show home page, which lists all your presentations. Find the presentation you want to delete and click its Trash link. This moves it to the Trashed Presentations section of Show. (You can get it back if you want; click the Trashed Presentations link, find the banished presentation, and click Restore.)

To delete a presentation completely, you need to dump it from Trashed Presentations. On the Zoho Show home page, click the Trashed Presentations link, find the presentation you're getting rid of, and click its Delete Forever link. Saying farewell forever is serious stuff, so Show asks if you're sure. Click Delete to confirm, and the presentation is gone for good.

Sharing a Presentation

When you're on a team that's creating a presentation together, Show enables you to invite others to work on the presentation you created. Everyone edits the same version, so when a colleague makes changes to your presentation, you (and everyone else you've invited) see those changes the next time you open the presentation.

To get more people on board—whether as viewers or full collaborators—open the presentation you want to share and click Share to open the dialog box shown in Figure 3.13. You can invite people to view your presentation without the ability to change it (Read Only Members) or give them full editing privileges (Read/Write Members). Type or paste in individual email addresses (use commas to separate them). Alternatively, you can click Add Contacts to choose from a list of your Zoho contacts. If you're inviting a group, click the Add Groups link and choose from the list that opens. To create a brand-new group, click Add Group, Manage Groups, Create New Group. Then follow the instructions in Chapter 1 for creating a group.

If you want Zoho to shoot you an email when a collaborator has made changes to your presentation, make sure the Notify Me box is checked.

You can send Zoho's standard email or add a custom message of your own. Click the Edit Invitation Email button to expand the Share This Document dialog box. A new text box appears on the right where can type your message.

When everything's all set, click Share to send out your invitations and add these people to your presentation.

Tip 4U   To send yourself a copy of the invitation email, click the Share This Document dialog box's Edit Invitation Email button and enable the Send a Copy to Me check box.

Show lets just one person at a time edit a presentation. So when a collaborator signs in and starts editing a presentation, it's locked to everyone else. On your Zoho home page, the presentation is listed as "locked for editing"; if you try to open it, Zoho tells you who's working on it right now and gives you the option to view the presentation (read only) as a slideshow (see the next section).
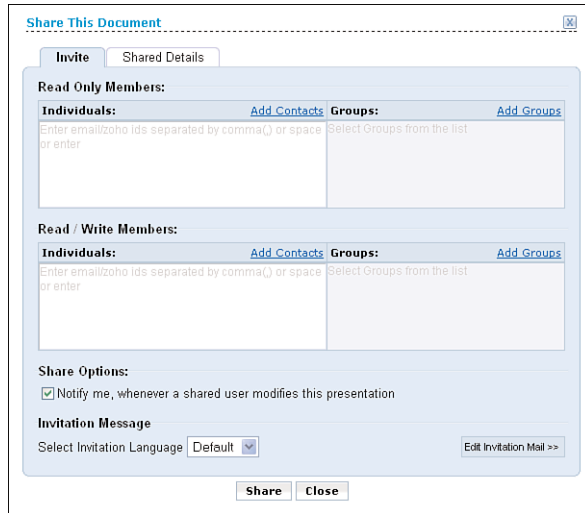
Figure 3.13
Invite individuals or groups to share a presentation.

Tip **4U** To see a presentation's history, go to Normal View's right-side pane and click the Version Details tab. This displays all the saved versions of the presentation; you can view, delete, or revert to any version.

Viewing a Presentation on the Web

Can't get everyone in the same room at the same time to view your presentation? No problem. One of the big advantages of creating and storing your presentation online is that you can share it over the Internet with an audience that accesses the presentation from wherever it happens to be.

Setting up a remote presentation involves two steps:

1. Inviting participants.
2. Giving the presentation.

Inviting Others to Your Online Presentation

A presentation isn't a presentation without an audience. So before you give your presentation online, you need to invite the people who'll view it. To send out invitations to audience members, open the presentation and select Remote. This opens the Remote URL dialog box, shown in Figure 3.14.
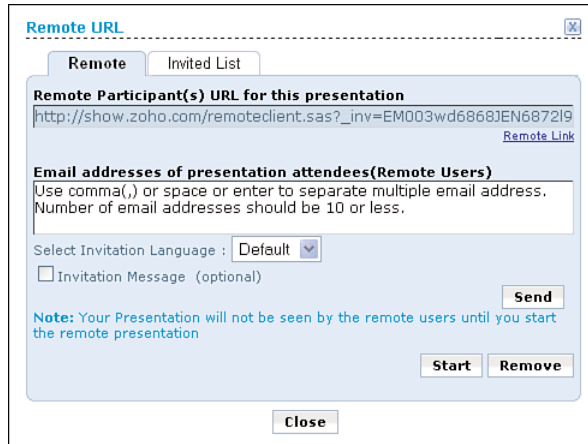
Figure 3.14
Invite others to view your online presentation.

The top section of this dialog box shows the web address for the presentation; this is where people can view the presentation when you show it.

The middle section is where you type in the email address of the people you're inviting to see your show. Be sure to include a comma between multiple addresses to separate them.

You can add a message to the standard one Zoho sends; this is a good way to let people know when the presentation will be. Check the Invitation Message box, and the section expands to show a text box where you can type in your message (up to 250 characters, so be concise).

Tip 4U   To see whom you've already invited, click Remote and then choose the Invited List tab. Click Re-Invite to send no-shows a quick reminder email.

When you've listed all the people you're inviting, click Send. Your invitations zip off through cyberspace to land in invitees' Inboxes. The email Zoho informs each recipient that you've invited him or her to attend a presentation and gives a link to the presentation's web address. When it's time to see the show, each attendee clicks the link, gives his or her name, and clicks another link to see the presentation.

Info 4U   The presentation doesn't start until you, as the creator, begin it, so you don't have to worry about anyone showing up early and paging through your slides.

Giving a Remote Presentation

When you're ready to give the presentation, sign in to Zoho Show, open the presentation, and click Remote to open the Remote URL box shown in Figure 3.14. Click the Start button to get things going.

The presentation view opens in a new window. Click the Start Remote link to start the show. When you click this link, a couple of things happen, as Figure 3.15 shows. The presentation becomes visible on your screen, as well as on the screens of any audience members who've already arrived. You also see the names of signed-in audience members in the Participants List on the right. Below this list is a chat window; type in the text box at the bottom to send a message to all signed-in participants.

Tip 4U To hide the Participants List and chat window, click the right-pointing arrow immediately to the left of this pane. This expands the presentation pane on your screen only. (Participants can click the arrow on their own screens, if they want.) To reveal the right-side pane, click the arrow again. (When the pane is hidden, the arrow points left.)

Presenter's controls
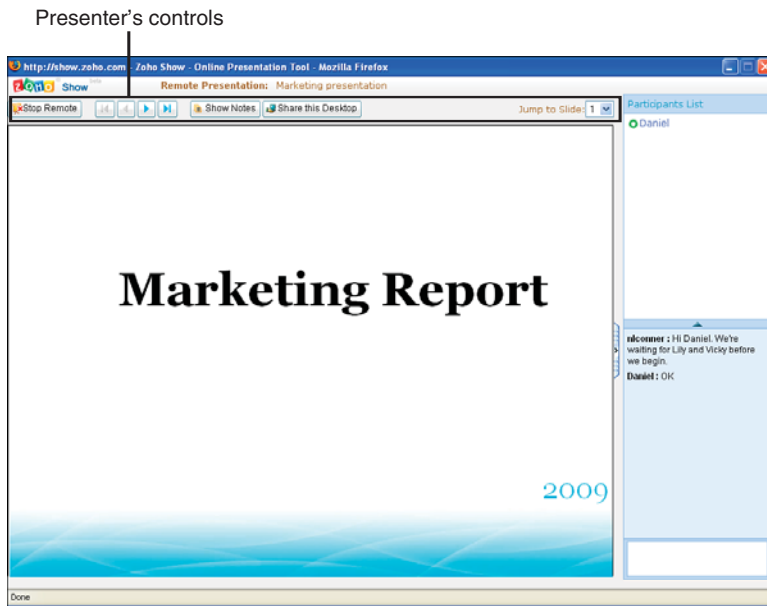
Figure 3.15
Zoho Show presentations appear in this viewer.

When you're the presenter, you see some controls across the top of the screen (refer to Figure 3.15) that participants don't have:

- **Stop Remote**—When the presentation's over, click this button to end the show, on your screen and your viewers' screens alike.
- **Navigation buttons**—Move forward or back by one slide, or jump to the last or the first slide of the presentation.
- **Show/Hide Notes**—If you've included notes on your presentation's slides, click this button to show (or hide) them. Notes appear on your screen, but not on your viewers' screens.

- **Share this Desktop**—Clicking this button installs the Zoho Meeting plug-in in your web browser if it's not already installed. (You may have to instruct your browser to allow the plug-in by listing show.zoho.com as a trusted site.) When you have Zoho Meeting installed, you can share your computer's Desktop with the presentation's viewers. Chapter 10, "Zoho Meeting: Web Conferencing Made Simple," explains everything you need to know about Zoho Meeting.

- **Jump to Slide**—If you want to skip a couple slides or go back to a previous one, choose the slide number to jump right to the one you want.

Info 4U   A participant can leave the presentation by clicking the upper-right X to close the browser window. Before the browser window closes, Zoho puts up a warning box saying that closing the window ends the remote presentation; the participant must click OK to leave. When someone leaves a presentation before the presenter ends it, that person's name disappears from the Participants List.

Publishing a Presentation

Those who can't be there for the group presentation are not completely out of the loop. (Or maybe the presentation is something you want to share with the world—an overview of your company, for example.) When you publish a presentation on the Web, anyone who has the URL can view the presentation at his or her leisure. You can also embed a presentation on an existing web page. This section tells you how to do both.

Publishing a Presentation on the Web

When you publish a presentation on the Web, Zoho embeds your presentation in a web page where people can view it at their own pace and, if they want, leave a comment on it. Viewers can find your presentation via its URL or (if you want) through Zoho's list of public presentations.

To publish a presentation on the Web, follow these steps:

1. In Show, open the presentation you want to publish. Click Publish to open the Make Public dialog box shown in Figure 3.16.
2. The Make Public dialog box requires a couple decisions. To update the public presentation every time you make changes to it in Zoho Show, make sure that the box labeled Automatically Re-Publish When Document Is Modified is checked. And if you want the presentation to be included on Zoho's massive list of public presentations (at http://show.zoho.com/latest), leave the Show in Zoho Public Presentation List box checked.
3. Click Make Public & Continue.

Zoho publishes your presentation to the Web and changes the Make Public dialog box to reflect this. To view the presentation, click the This Presentation Is Publicly Available at the Following URL link, or copy the link in the box below it and paste it into the address bar of your web browser. The link looks something like this:

    http://show.zoho.com/public/yourZohoID/Presentation%20Name
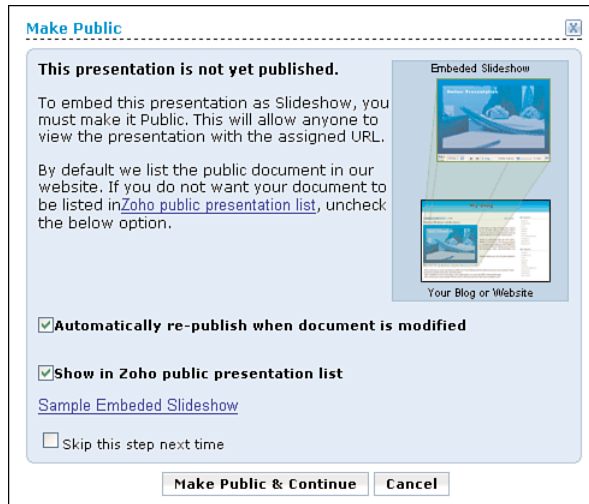
Figure 3.16
Publish a presentation on the Web with the Make Public dialog box.

You can email that link to others right from Zoho. (Click the Email link and provide addresses separated by commas.)

Tip 4U To remove your presentation from Zoho's public presentation list, open the presentation and click Publish. In the Make Public dialog box, click the Change to HIDDEN Mode link. If you want a hidden presentation to appear on Zoho's public list, click Publish, Change to SHOW Mode.

Info 4U To remove a published presentation from the Web, open the presentation in Show and then click Publish, Remove Public. Click OK to confirm.

Embedding a Presentation in an Existing Web Page

You may have a website where you want to show the presentation to anyone who visits the site. For example, you could feature a presentation about new products on your company's home page. The first step in doing this is to publish the presentation, as described in the previous section. When you've done that, the Make Public dialog box changes to give the URL of the published presentation. It also gives you HTML code that you can use to embed the presentation in your own web page.

Open the published presentation in Show and then click the Publish button. In the top section of the dialog box is a snippet of HTML code that looks something like this:

```
<iframe src="http://show.zoho.com/embed?USER=yourZohoID&DOC=
Presentation%20Name&IFRAME=yes" height="335" width="450"
name="Presentation Name" scrolling=no frameBorder="0"
style="border:1px solid #AABBCC"></iframe>
```

Copy the code snippet and paste it into an HTML document. Upload the document to your site, and the presentation appears there.

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