

CLEARPATH CONSULTING, LLC

Zoho One Implementation & Managed Services

Zoho Projects

Standard Operating Procedures Manual

Portal administration, projects and templates, task management, time tracking, issue tracking, collaboration, automation, and reporting

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Every procedure in this manual is drawn from Zoho's official documentation, cited by chapter under a Sources heading. Passages that could not be independently verified against a stable, dedicated source are flagged in a Verification Note rather than stated as settled fact.

How to Use This Manual

This manual documents ClearPath Consulting's standard method for configuring and operating each area of Zoho Projects. It serves two purposes at once: it is the internal reference ClearPath consultants follow on every engagement, and it is a work sample provided to prospective clients to demonstrate ClearPath's delivery methodology.

Each chapter is organized into numbered sub-sections. Procedures are presented as sequential numbered steps. A green Best Practice box highlights a recommended approach; an orange Common Pitfall box flags a frequent implementation error; a gold Verification Note marks a claim that could not be confirmed against a stable, dedicated Zoho documentation source at the time of writing and should be reconfirmed in the client's live environment before being treated as settled fact. Every chapter closes with a Sources list citing the official Zoho documentation each procedure was drawn from.

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Chapter 1: Organization Setup & Portal Administration

1.1 Portal-Level General Settings

Before a client team begins working in Zoho Projects, a consultant must establish the foundational portal identity and configuration. Portal-level settings control the organization's name, logo, sender email address, and communication defaults, and they establish the general framework that every subsequent project inherits. Zoho Projects allows administrators to map a custom domain so that the portal URL reflects the client's brand rather than the default projects.zoho.com address, reinforcing a professional experience for both internal staff and external client users.

Administrators can also configure a disclaimer that users must accept before accessing the portal, which is useful for organizations that need to formalize acceptable-use policies. Zoho Projects further allows the Issue Tracker and Phase modules to be renamed to match industry terminology. A construction firm, for example, may prefer to rename Issues to Defects, while a software company may retain the default naming. These settings are accessed from the same central configuration screen used for business hours, holidays, and project and budget defaults.

Procedure: Accessing Portal Configuration

1. Click the Settings icon located in the upper-right corner of the Zoho Projects interface.
2. Select Portal Configuration from the settings menu.
3. Choose the relevant tab, such as portal details, custom domain, disclaimer, or business calendar, to configure the corresponding setting.
4. Save each change before moving to the next configuration area.

Best Practice

Configure the custom domain and portal branding during the earliest phase of implementation, before inviting client users, so that the client's first experience of the portal already reflects their own brand identity rather than a generic Zoho URL.

Common Pitfall

Consultants sometimes rename core modules, such as Issues, to match a client's internal vocabulary without documenting the change. Because the underlying module identity does not change, this can confuse client-side administrators who later search Zoho's own help documentation, which still refers to the default names.

1.2 User Roles, Profiles, and Permissions

Zoho Projects separates access control into two distinct concepts: roles and profiles. A role represents a user's designation or position within the organization, such as Administrator, Manager, Employee, or Contractor, which are the four default roles provided out of the box. A profile, by contrast, defines the actual permissions a user has within the application. Two users who share the same role can be assigned different profiles depending on the level of access their work requires. Custom roles and custom profiles are available only on the Enterprise plan, although the default profiles other than Admin and Client can be modified on any paid plan.

Zoho Projects ships with three default User Profiles, Admin, Employee, and Contractor, along with a default Client Profile named Client. The Admin and Client profiles cannot be edited directly, though they can be cloned and the clone can then be customized. Additional system profiles, Viewer, Read-Only, and, on the Ultimate plan, Lite User, extend the model further. Permissions themselves are organized into three tiers: Portal Level, which governs organization-wide capabilities such as project creation and user management; Project Level, which governs what a user can do within an individual project; and Module Level, which governs access to specific features such as tasks, issues, time logs, and phases. Only User Profiles can receive portal-level permissions; Client Profiles are restricted to project-level and module-level permissions.

The Portal Owner occupies a distinct position above the Administrator role. Certain capabilities, including changing the portal owner, managing the subscription, backing up or deleting portal data, designating administrators, accessing developer features such as API keys and service hooks, configuring Slack integration, and reviewing audit logs, are reserved exclusively for the Portal Owner and cannot be delegated. Administrators share a broad but smaller set of privileges with the Portal Owner, including editing organizational settings, managing third-party integrations, importing and exporting users, and deleting custom layouts, fields, and views.

Procedure: Creating a Custom Role

1. Navigate to Settings, then Profiles and Roles, then Roles.
2. Click Add Role.
3. Enter a name for the role.
4. Optionally set the new role as the default role assigned to future users.

Procedure: Creating a Custom Profile

1. Navigate to Settings, then Profiles and Roles, then Profiles.
2. Select the User Profiles tab to create an internal profile, or the Client Profiles tab to create an external profile.
3. Click the add button and enter a profile name.
4. Configure permissions across modules, portal access, settings, integrations, and field-level access.
5. Save the profile.

Best Practice / Common Pitfall

Assign roles based on organizational designation and assign profiles based on required access, rather than conflating the two. A common pitfall among newly onboarded client administrators is assuming that changing a user's role automatically changes their permissions; in Zoho Projects the two attributes are independent and both must be set deliberately.

Verification Note

Zoho's documentation does not specify a maximum number of Administrators per portal, nor does it clarify whether portal ownership can be held jointly. Consultants should verify current limits directly within the client's portal or with Zoho support before making representations to the client about administrator capacity.

1.3 Adding and Inviting Users

Zoho Projects distinguishes between Portal Users, internal team members who work on projects, and Client Users, external stakeholders the organization works for. Both categories are invited through a similar email-based workflow, but the available fields differ. Client users can be associated with a customer record, which allows a consultant to onboard multiple contacts from the same client organization under a shared customer profile.

Procedure: Inviting a Portal User

1. Navigate to Users, then the Portal Users tab, then List View.
2. Click Invite User in the upper-right corner.
3. Select an existing invitation template or create a new one.
4. Enter the user's email address, separating multiple addresses with commas.
5. Assign a role and profile to the invitee.
6. Enter Rate Per Hour and Cost Per Hour if the engagement requires cost tracking.
7. Designate a reporting manager and select applicable business hours.
8. Select the projects the user should be added to.
9. Click Invite.

Procedure: Inviting a Client User

1. Navigate to Users, then Client Users.
2. Click Invite Client User in the upper-right corner.
3. Enter the client user's email address.
4. Select an existing invitation template or create a new one.
5. Select the customer the user belongs to, or add a new customer record.
6. Select a client profile and, if project billing is based on staff hours, enter Rate Per Hour and Cost Per Hour.
7. Select the project or projects to associate with the client user.
8. Click Invite.

Best Practice

Maintain separate invitation templates for internal staff and client users so that each audience receives onboarding language and portal orientation appropriate to their role.

Common Pitfall

Because users assigned the Admin profile are automatically added to every project in the portal, consultants managing multiple concurrent client engagements from a single ClearPath-administered portal should avoid granting Admin profiles broadly, as doing so can expose one client's project data to staff who are not part of that engagement team.

1.4 Teams, Business Hours, and Holidays

Zoho Projects groups users through Teams, which function as the portal's mechanism for organizing staff into departments or working groups. A team can be assigned a lead, a set of member users, a shared email alias for consolidated notifications, and one or more associated projects. Teams are available on the Enterprise plan, with a limit of fifty teams per portal.

Business Hours and Holidays together define the organization's working calendar, which downstream features such as task scheduling, timesheet approval, and reminder timing rely upon. Both settings live under Portal Configuration and are available on the Premium, Enterprise, and Ultimate plans.

Procedure: Creating a Team

1. Navigate to Users, then Teams.
2. Click Add Team.
3. Enter a team name.
4. Select members from the list of portal users.
5. Designate a team lead.
6. Associate relevant projects with the team.
7. Provide a team email alias.
8. Save the team.

Procedure: Configuring Business Hours

1. Click the Settings icon in the upper-right corner.
2. Navigate to Portal Configuration, then Business Calendar, then the Business Hours tab.
3. Click New Business Hours.
4. Enter a name for the configuration.
5. Drag the ends of the timeline to define working hours for each day.
6. Click a time slot to configure a break for that day.
7. Select an existing holiday list or create a new one.
8. Click Add to save the configuration.

Procedure: Adding Holidays

1. Click the Settings icon in the top navigation panel.
2. Navigate to Portal Configuration, then Date and Time Settings, then the Holidays tab.
3. Enter the holiday details.
4. Click Add Holiday.

Best Practice

Build the holiday list before configuring business hours and before creating the first client project, since business hour schedules reference an existing holiday list and retroactively updating it can shift already-scheduled task dates.

Common Pitfall

Business hours and holiday configuration are unavailable on the entry-level plan tiers. Consultants scoping an engagement should confirm the client's Zoho Projects plan before committing to business-hours-based scheduling as part of the delivery methodology.

1.5 Portal-Level Customization: Fields, Layouts, and Modules

Beyond the core business settings, Zoho Projects provides a dedicated Customization area within Settings that governs how modules, tabs, fields, and layouts behave across the portal. This area includes Modules and Tabs, which controls which application modules are enabled; Layouts and Fields, which governs the forms used to capture information for projects, tasks, and issues; Special Fields, which covers unique field types with dedicated behavior; Layout Rules, which allow conditional logic to be applied to forms; Task Templates, which allow reusable task configurations; and Invitation Templates, which allow the email content sent to new users to be customized.

This customization layer is what a consultant uses to tailor Zoho Projects to a client's specific terminology, required data points, and workflow logic before end users begin working in the system. The mechanics of applying this customization at the project level, including custom fields, layouts, and layout rules, are addressed in detail in Chapter 2.

Best Practice

Establish the portal's field and layout standards centrally before any project templates are built, since project templates and project layouts draw on the same underlying custom field library.

1.6 Notification Settings

Zoho Projects offers layered notification controls that operate at both the personal and portal level. At the personal level, users can configure email notifications for tasks and milestones they create or are assigned to, along with a catch-all option to be notified of all of their activity. Users experiencing high notification volume can switch to a consolidated summary email delivered at a defined frequency, although certain notification types, including new portal invitations, project additions, and direct messages, are excluded from summary consolidation and are always delivered individually.

Zoho Projects also provides Activity Reminder notifications, which include a Daily Digest of pending tasks, issues, and milestones; alerts for unassigned tasks and bugs; and alerts for overdue items across projects. Users can configure the frequency of these reminders as Daily, Weekly, or Monthly and specify the time of day they are triggered. Portal Owners can additionally customize notification defaults for the entire organization, though the specific portal-level configuration screen was not detailed in the source documentation available for this manual.

Verification Note

The exact interface for portal-wide (organization-level) notification defaults was referenced in Zoho's documentation but not fully documented in the source article reviewed. Consultants should verify the current location of this setting directly within the client's portal.

Sources

- [Configuration | Online Help | Zoho Projects](#)
- [Portal Configuration in Zoho Projects](#)
- [Roles | Online Help | Zoho Projects](#)
- [Permission Sets | Online Help | Zoho Projects](#)
- [Profiles and Roles | Online Help | Zoho Projects](#)
- [Profiles | Online Help | Zoho Projects](#)
- [Portal Owner and Admin Permissions - Zoho Projects](#)
- [Manage Users in Zoho Projects - Concept](#)
- [Portal User List View | Online Help | Zoho Projects](#)
- [Client User List View | Online Help | Zoho Projects](#)
- [Teams Grid View | Online Help | Zoho Projects](#)
- [Business Hour settings | Online Help | Zoho Projects](#)
- [Can I add vacations and holidays in the project business hours? | Zoho Projects FAQ](#)
- [Customization | Online Help | Zoho Projects](#)
- [Notification Settings - Zoho Projects](#)
- [Read Only Access Users | Online Help | Zoho Projects](#)

Chapter 2: Projects & Templates

2.1 Creating a New Project

Creating a project is the central action a consultant performs to begin a new client engagement or a new phase of work within Zoho Projects. The project title is the only mandatory field, but a well-formed project also specifies an owner, a start and end date, an overview, a group classification, associated business hours, a budget where applicable, and a task layout that determines the custom fields and statuses available to tasks within the project. When Zoho Invoice or Zoho Books integration is active, the project can also be assigned a billing method of either Based on Staff Hours or Based on Project Hours.

Zoho Projects supports a Strict Projects mode, available on the Premium and Enterprise plans, under which phases, tasks, and other project modules must have start and end dates that fall within the overall project's scheduled start and end dates. Every project is also assigned a privacy level: Private projects restrict access to members who are explicitly added, while Public projects grant all portal users read-only visibility.

Procedure: Creating a New Project

1. Navigate to Projects in the left sidebar.
2. Click New Project in the upper-right corner.
3. Enter a project title.
4. Optionally select a template, assign an owner, and set start and end dates.
5. Enter a project overview.
6. Assign the project to a group, associate business hours, and set a budget if applicable.
7. Select a task layout to define the custom fields and statuses used for tasks in the project.
8. Select a billing method, Based on Staff Hours or Based on Project Hours, if integrated with Zoho Invoice or Zoho Books.
9. Set the project's privacy level, Public or Private.
10. Click Add.

Best Practice

Set the project privacy level deliberately at creation rather than leaving it at the account default. For client-facing engagements, a Private project ensures that only the assigned engagement team and invited client users can view the work.

Common Pitfall

Skipping template selection when creating a project that duplicates a standard service offering results in a consultant manually recreating phases, task lists, and layouts that a template would have populated automatically, adding avoidable setup time to every new engagement.

2.2 Project Statuses and General Project Configuration

Zoho Projects allows administrators to define custom project statuses and assign each one a distinct color, which are configured through the same Layouts and Fields customization area used for custom fields. This

allows a firm to represent its own delivery lifecycle, for example Discovery, In Configuration, Client Review, and Closed, directly within the status field rather than relying on generic defaults. General project configuration, including project number prefixes, budget enablement, currency, and threshold-based cost notifications, is set at the portal level under Portal Configuration and then inherited by new projects.

Verification Note

Zoho's official documentation reviewed for this manual confirms that custom project statuses with assigned colors can be created, but it does not enumerate the exact set of statuses provided by default out of the box. Consultants should confirm the current default status set directly within a live portal before documenting it for a client.

Best Practice

Align custom project statuses with the firm's own delivery methodology stage names so that portfolio-level reporting reflects consistent terminology across every client engagement.

2.3 Project Templates: Creation and Application

Project templates allow a firm to capture the full structure of a project, including milestones, task lists, tasks, and forums, so that it can be replicated for future engagements without manual rebuilding. Templates can be created from scratch or generated by converting an existing, already-built project into a template, which is a practical option for consultants who want to standardize a project structure they have already delivered successfully. When converting an existing project into a template, Zoho Projects allows closed tasks to optionally be converted back to open tasks so the template represents a fresh starting state.

Templates support recurring tasks with configurable frequency, including a Set to Previous Business Day option that automatically shifts recurrence dates off weekends or holidays for monthly or yearly recurring tasks. Templates also carry forward task reminder configuration, allowing reminders to be sent daily, on the due date, or a specified number of days in advance, calculated with respect to the portal's business hours.

Procedure: Creating a Template from Scratch

1. Navigate to the Projects tab.
2. Select Project Templates.
3. Click New Project Template.
4. Choose a project layout.
5. Enter a template name and project overview.
6. Click Add Project Template.

Procedure: Converting an Existing Project into a Template

1. Navigate to Project Templates.
2. Select the project to convert from the Choose from Projects drop-down.
3. Optionally choose to convert closed tasks to open tasks.
4. Save the template.

Procedure: Creating a Project from a Template

1. Navigate to the Projects tab.

2. Click New Project.
3. Select the desired template from the Template field drop-down.
4. Enter the project start date and complete the remaining project details.
5. Click Add.

Best Practice

Build a template library organized by service line, for example a distinct template for a Zoho CRM implementation engagement versus a Zoho Books migration engagement, so that every new client project begins from a structure calibrated to that offering.

Common Pitfall

Template counts are capped by plan, twenty on the Premium plan and thirty on the Enterprise plan. Firms that create a new template for every client rather than maintaining a smaller set of reusable, parameterized templates can exhaust this limit and be forced to delete templates that are still in active use.

2.4 Reusing Project Structures: Template Gallery and Cloning

Zoho Projects includes a built-in Template Gallery containing pre-built templates across categories such as software and IT, digital marketing, construction, manufacturing, event planning, and other industry-specific use cases. The gallery is presented automatically when a consultant clicks New Project, and it can be dismissed in favor of the standard project creation form if a firm prefers to rely exclusively on its own custom templates. The gallery remains reachable at any time through a Browse Templates option on the New Project form.

Verification Note

Zoho's Books, Billing, and Invoice products each offer a discrete one-click Clone Project feature for their own timesheet-oriented project object. The official Zoho Projects documentation reviewed for this manual did not surface an equivalent standalone Clone Project action for the core Projects application; the documented mechanism for duplicating an existing project's structure is converting that project into a template and then creating a new project from the resulting template, as described in Section 2.3. Consultants should verify directly within the client's portal whether a native clone action exists before representing project duplication as a one-step operation.

2.5 Project-Level Users, Roles, and Profiles

Users must be added to a specific project before they can be assigned work within it, even if they already hold an account at the portal level. Existing portal users are added directly from within the project, while new users can be invited to the portal and the project simultaneously. Users holding the Admin profile are automatically included in every project in the portal by default and do not need to be added manually.

A user's profile can be overridden at the project level without affecting their portal-wide profile, which allows a consultant to grant a broader or narrower set of permissions for a specific engagement. Individual permissions within that project-level profile can be further customized on a per-user basis for cases that require more granular control than swapping the assigned profile provides.

Procedure: Adding Users to a Project

1. Navigate to the project and open the Users section.
2. Click Add Users to include existing portal users, selecting them from the Portal Users tab.
3. Alternatively, select the Invite User tab to send an invitation to a new user by email.
4. Confirm the addition or send the invitation.

Procedure: Customizing a User's Project-Level Profile

1. Open the Users section within the project.
2. Locate the Project Profile column for the user.
3. Click the profile drop-down and select a new profile, or hover over the user, select Edit, and click the customize icon to toggle individual permissions.
4. Click Update to save the change.

Best Practice

Use project-level profile overrides to grant client stakeholders a narrowly scoped view of their own engagement rather than relying solely on their portal-wide Client profile, which may be broader or narrower than what a specific project requires.

Common Pitfall

Because Admin-profile users are automatically added to every project, a firm operating one portal across multiple unrelated client engagements should limit how many staff hold the Admin profile, since each Admin-profile user will otherwise have visibility into every client's project by default.

2.6 Project-Level Customization: Layouts, Fields, Tabs, Layout Rules, and Tags

Every project uses a layout, a form that determines which fields are collected for that project, and every portal begins with a default Standard Layout containing Project Information and Budget sections. Administrators can create up to forty custom layouts by cloning an existing layout as a starting point, and up to one hundred five custom fields across supported field types, including text, pick list, user selection, date, number, and encrypted fields for sensitive data. Removing a field from a layout preserves its underlying data, but deleting a field from the portal entirely removes its data across every project that used it, so the two actions carry meaningfully different risk.

Project tabs, the modules visible within a given project such as Tasks, Issues, Documents, and any custom web tabs, can be added, removed, and reordered through the Organize Tabs screen. This same screen controls which tabs are visible to client users, allowing a consultant to present a simplified, client-appropriate view of the project while internal staff retain access to the full module set. Default tabs cannot be removed, only reordered.

For task forms specifically, Layout Rules, an Enterprise-plan feature, allow conditional logic to be layered onto the Add Task form. Conditional rules can make fields mandatory or visible based on the value of other fields, while dependent rules filter the options available in one field based on the value selected in another. A single layout supports up to thirty-five conditions per rule and two hundred conditions in total across all of its rules.

Tags provide a lightweight, cross-module way to classify and later filter projects, milestones, task lists, tasks, issues, and status updates. Tags are enabled by default and can be toggled through Portal Configuration under the Project and Budget tab; once enabled, a tag can be created inline simply by typing a new tag name into a Tags field and pressing Enter.

Procedure: Creating a Custom Project Layout

1. Navigate to Settings, then Customization, then Layouts, then Projects.
2. Select a base layout to clone.
3. Enter a name for the new layout.
4. Assign the user profiles permitted to use the layout.
5. Save the layout.

Procedure: Organizing Project Tabs

1. Open the project and click the Settings icon in the top navigation bar.
2. Select Organize Tabs.
3. Click Add Module/Web Tab to include additional modules.
4. Drag and drop modules to reorder them.
5. Check the box to apply the change to existing and future projects, if desired.
6. Save the configuration.

Best Practice

Rename, reorder, and selectively expose project tabs to match the client's own operational vocabulary and their appropriate level of access, giving client users a focused view while preserving the full module set for the internal delivery team.

Common Pitfall

Removing an enabled tab makes it inaccessible to every member of the project, including any data already recorded there. Confirm that no active workflow depends on a module before disabling it, particularly on a live client engagement.

Sources

- [Create Projects | Online Help | Zoho Projects](#)
- [Zoho Projects: An Overview | Online Help | Zoho Projects](#)
- [Project Layouts and Fields | Online Help | Zoho Projects](#)
- [Project templates | Online Help | Zoho Projects](#)
- [Create Project From Template | Online Help | Zoho Projects](#)
- [Template Gallery - Zoho Projects](#)
- [Custom Project Templates | Zoho Projects](#)
- [Manage Users in a Project | Online Help | Zoho Projects](#)
- [Profiles and Roles | Online Help | Zoho Projects](#)
- [Tags | Online Help | Zoho Projects](#)

- [Organize Project Tabs | Online Help | Zoho Projects](#)
- [Task Layout Rules | Online Help | Zoho Projects](#)
- [Portal Configuration in Zoho Projects](#)

Chapter 3: Task Management

3.1 Creating and Managing Task Lists

Task lists are the primary organizational unit within a Zoho Projects task module. They allow a project team to group related tasks so that progress can be tracked collectively rather than task by task. According to Zoho's documentation, task lists can be built from templates for rapid setup, configured with internal or external visibility, given automated start dates, and marked complete once every associated task has finished. Zoho Projects also provides Chart View reporting on task lists, giving a visual summary of task status, user assignment, and budget consumption for the tasks contained within the list. Common applications include grouping architectural deliverables such as floor plans and elevations, consolidating new-hire onboarding tasks in an HR project, or collecting quality assurance test cases for a single software feature.

Procedure: Creating a Task List

1. Open the target project and navigate to the Tasks module.
2. Select the option to add a new task list, either from a blank list or from an existing template.
3. Name the task list and, if applicable, associate it with a phase.
4. Configure visibility as internal or external depending on whether client collaborators should see the list.
5. Save the task list so it becomes available for task creation.

Best Practice

Standardize a small set of task list templates for recurring engagement types, such as a discovery task list and a go-live task list, so that every implementation starts from a consistent structure.

Once created, task lists in Zoho Projects can be edited, reordered, and moved between projects or phases. The platform supports drag-and-drop reordering when tasks are grouped by task list or phase, and a dedicated Move function relocates a task list to a different project or milestone. Teams can add comments with file attachments directly on a task list's detail page and can follow a task list to receive update notifications. A task list can be marked complete, converted into a reusable template, or shared through a copy-link feature. Administrators can also associate a Blueprint with a task list to standardize the statuses available to tasks within it. Deleted task lists move to the Recycle Bin, where Zoho Projects retains them for sixty days before permanent removal.

Common Pitfall

Deleting a task list without first confirming that its tasks do not contain invoiced time logs can create billing discrepancies, since invoiced work should be preserved for audit purposes rather than trashed.

3.2 Task Details: Dates, Duration, Priority, and Ownership

A task in Zoho Projects is created by entering a title inline within a task list and pressing Enter, after which the task can be opened to configure its full detail set. Every task receives an auto-generated, project-prefixed unique identifier that is never reused, even after the task is deleted, which preserves a clean audit trail

across the life of the project. From the task details page, a user can set a start date and either an end date or a duration. Zoho's documentation notes that a user can click Enter Duration and specify a number of days rather than manually choosing an end date, and that a single task can span a maximum of ten years.

Procedure: Creating and Configuring a Task

1. Enter a task title inline within the appropriate task list and press Enter to create the task record.
2. Open the task to access its detail page.
3. Set the start date and either the end date or the duration.
4. Assign a priority level and, if relevant, a custom status.
5. Add one or more owners by selecting Owner and choosing users from the search box.
6. Set the billing classification to None, Billable, or Non-Billable so that the task's time entries inherit the correct billing behavior.
7. Save the task to apply the configuration.

Work can be estimated using hours per day, a percentage of the day, or total work hours, and Zoho Projects supports both standard and flexible allocation of that work across the task's duration. Fields can also be edited inline directly from the task list view without opening the full detail page, and multiple tasks can be selected at once to apply status, date, priority, billing type, owner, or tag changes in bulk.

Best Practice

Assign a single primary owner per task even when multiple collaborators are tagged, so that accountability for completion remains unambiguous during status reviews.

Common Pitfall

Leaving a task's billing type at its default value rather than explicitly setting Billable or Non-Billable can cause logged hours to be miscategorized when timesheets are later reconciled against the project budget.

3.3 Phases (Milestones) and Project Structure

Zoho Projects renamed its Milestones feature to Phases, and the two terms are still used interchangeably across the documentation. A phase is described as a goal-based target within a project that functions as a progress indicator, and task lists exist as subordinate organizational units nested inside phases. Phases can be flagged as external, making them visible to both internal team members and client collaborators, or internal, restricting visibility to portal users only. Phases also support release notes summarizing completed tasks and bugs, budget tracking at the phase level, and activity streams that record status changes over time.

Procedure: Linking a Task List to a Phase

1. Open the task list's menu options from the Tasks module.
2. Select Edit Task List.
3. Choose the desired phase in the Related Phase field.
4. Save the change to complete the association.

A significant structural limitation is that dependencies cannot be set between phases directly; dependency relationships in Zoho Projects exist only between individual tasks. Task lists also cannot be reordered from

within the Phases section itself, although they can be reordered from the List or Gantt views inside the Tasks module. Phases that contain tasks with invoiced time logs cannot be deleted, which protects billing history from accidental removal.

Best Practice

Map each phase to a genuine client-facing deliverable or payment milestone, such as Discovery, Configuration, and Go-Live, so that phase completion aligns with contractual checkpoints.

Common Pitfall

Attempting to set a dependency directly between two phases will not work as expected, since Zoho Projects only supports dependency relationships at the task level; sequencing between phases must be enforced through dependencies on the tasks that anchor each phase's start and finish.

3.4 Subtasks, Task Dependencies, and Recurring Tasks

Subtasks allow a task to be broken into smaller units of work while remaining nested under a parent task for tracking purposes. A subtask can be created by opening a task, selecting Subtasks, and choosing Add Subtask, or by dragging one task beneath another to nest it. Zoho Projects permits up to six levels of nested subtasks beneath a single parent task. Subtasks carry the same configuration options as standard tasks, including priority, duration, percentage complete, assignees, and dates, and a roll-up feature aggregates subtask timelines and logged work hours up to the parent level.

Procedure: Creating a Subtask

1. Open the parent task and select Subtasks.
2. Choose Add Subtask and enter a title.
3. Configure the subtask's dates, duration, priority, and assignee as needed.
4. Save the subtask so it appears nested beneath the parent in List, Gantt, and Kanban views.

Common Pitfall

Because closing a parent task automatically closes all of its subtasks, marking a parent task complete before every subtask is genuinely finished will silently close remaining work; the parent must be reopened before any subtask can be reopened individually.

Task dependency links tasks that must be executed in a defined sequence. Zoho Projects supports four dependency types: Finish-to-Start, where a successor cannot begin until its predecessor is complete; Start-to-Start, where a successor can begin only after its predecessor has started; Finish-to-Finish, where a successor cannot finish until its predecessor finishes; and Start-to-Finish, where a successor's completion is tied to its predecessor's start. Dependencies can further be configured as a hard link, where the successor's dates automatically shift when the predecessor's dates change, or a soft link, where the successor's dates remain fixed despite predecessor changes. Administrators can set an organization-wide default dependency type, including an Automatic option that assigns a dependency type based on the tasks' existing dates.

Procedure: Setting a Task Dependency

1. Open the Gantt chart or the task detail page for the successor task.
2. Select the option to add a dependency and choose the predecessor task.

3. Choose the dependency type: Finish-to-Start, Start-to-Start, Finish-to-Finish, or Start-to-Finish.
4. Choose whether the link should be hard or soft.
5. Save the dependency so the schedule reflects the new relationship.

Recurring tasks automate task creation at regular intervals, including daily, weekly, monthly, and yearly frequencies. Recurrence can be configured to trigger on completion of the prior instance, on a fixed schedule, or on whichever condition occurs first. For monthly and yearly recurring tasks that would otherwise fall on a holiday or weekend, Zoho Projects automatically adjusts the due date to the previous working day.

Best Practice

Use the On Completion trigger for recurring tasks whose cadence should depend on actual finish dates, such as recurring client status reports, and reserve the On Schedule trigger for tasks with hard calendar deadlines, such as monthly compliance filings.

3.5 Task Statuses, Blueprints, and Visual Views: Gantt Chart and Kanban Board

Zoho Projects ships with default task statuses but allows custom statuses to be defined and enforced through its Blueprint automation feature. A Blueprint is built from two core components: a status, representing the current stage of a task within a workflow, and a transition, which connects two statuses and governs how a task moves between them. Within a Blueprint, administrators can add new custom statuses beyond the defaults, and each transition can be restricted to specific users or roles and configured with before, during, and after actions such as mandatory field entry, email notifications, field updates, or webhook triggers.

Procedure: Building a Custom Status Workflow with Blueprint

1. Navigate to Settings, then Automation, then Task Automation, and open Blueprint.
2. Create a new Blueprint and define the statuses that represent each stage of the workflow.
3. Define transitions connecting each status to the statuses that should logically follow it.
4. Configure before, during, and after conditions and actions for each transition as needed.
5. Publish the Blueprint so the new statuses become available on the task layout.
6. Associate the Blueprint with the relevant task list.

Verification Note

the documentation reviewed for this manual did not specify a hard limit on the number of custom statuses a single Blueprint can contain; consultants should confirm current limits in the live portal before committing a client-specific status taxonomy to a proposal.

The Gantt chart provides a visual project schedule showing task progress, task owner, task status, and related task data across a timeline. Zoho Projects offers two Gantt formats: a Milestone Gantt view, which organizes tasks hierarchically beneath phases shown as diamonds, and a Chronology Gantt view, which orders tasks strictly by start date and exposes the critical path. Task bars can be dragged to reschedule work directly on the chart, and dependencies, including lead and lag adjustments between predecessor and successor tasks, can be set from within the Gantt view itself.

Verification Note

Zoho's Gantt documentation references baseline-related functionality only in passing, without a dedicated explanation of how baseline snapshots are captured or compared against the live schedule; this manual does not make specific procedural claims about baselining until that capability is confirmed directly in the product.

The Kanban board view displays tasks as cards that can be organized by status, task list, priority, or percentage complete. Cards can be dragged between columns to update the underlying property, and users can perform quick edits such as changing a due date or adding a comment directly from a card. Columns can be customized with color coding, and new statuses or task lists can be created directly from the board. The Kanban view also supports bulk operations, allowing a team to select multiple cards and update owners, statuses, dates, or tags simultaneously.

Best Practice

Use the Kanban board for daily team stand-ups and short-cycle work management, and reserve the Gantt chart for client-facing schedule reviews where sequencing, dependencies, and the critical path need to be communicated visually.

Common Pitfall

A custom status created inside a Blueprint will not appear on the task layout, and therefore will not be selectable on tasks, until the Blueprint is explicitly published.

3.6 Bulk Task Operations: Import, Export, and Bulk Edit

Zoho Projects supports importing tasks from MPP, MPX, XLS, JSON, and CSV files, with a stated maximum of five thousand tasks per import. The import wizard requires mapping custom fields to the existing task layout, aligning date formats with the accepted dropdown options, and mapping imported task statuses and users to their project-level equivalents. The platform supports multi-sheet files, subtasks, and task dependencies within a single import; dependencies are expressed through a Predecessor column using a syntax such as a task identifier followed by the dependency type and any lag, for example a Finish-to-Start relationship with a three-day lag. Tags are added as comma-separated values enclosed in double quotes, and work hour values use specific column keys for hours per day, percentage per day, and total hours. Single-line text fields are capped at 255 characters and picklist values at 100 characters.

Procedure: Importing Tasks from a File

1. As an administrator, navigate to Data Administration and select Imports.
2. Choose the source file in a supported format and select the target project.
3. Map custom fields, statuses, and users to their corresponding project fields.
4. Review date formats and dependency syntax for accuracy.
5. Run the import and review the confirmation summary for any rejected rows.

Best Practice / Common Pitfall

Run a small test import of a handful of representative tasks before importing a full project plan;

doing so surfaces field-mapping and character-limit errors, such as picklist values exceeding one hundred characters, before they affect the full five-thousand-task batch.

Tasks can also be exported to XLS or CSV format, or to a connected cloud storage location. The export process allows selection of a predefined or custom task view, choice of which columns to include, and an option to password-protect the resulting file. Zoho Projects additionally supports exporting tasks across all projects at once from the Work Overview section, rather than limiting export to a single project at a time.

Procedure: Exporting Tasks

1. Navigate to the Tasks module within the project.
2. Select the export option and choose Export Tasks.
3. Select the task view and the columns to include in the export.
4. Choose the output format and, optionally, apply password protection.
5. Download the file from the generated link.

Beyond import and export, Zoho Projects supports bulk edit operations directly within the List, Gantt, and Kanban views. Selecting multiple tasks allows simultaneous changes to status, dates, priority, billing type, owners, and tags, which is particularly useful when re-baselining a schedule or reassigning work after a staffing change.

Sources

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- [Manage Tasks | Online Help | Zoho Projects](#)
- [Kanban View | Online Help | Zoho Projects](#)
- [Gantt charts | Online help | Zoho Projects](#)
- [Blueprint | Online Help | Zoho Projects](#)
- [Import from XLS/CSV/JSON/MPP | Zoho Projects](#)
- [Export Tasks | Online Help | Zoho Projects](#)

Chapter 4: Time Tracking & Timesheets

4.1 Logging Time: Timers and Manual Entries

Zoho Projects allows time to be captured either in real time through a timer or after the fact through a manual log entry. A timer can be started directly from the task or issue list view, and only the user assigned to that task or issue can start its timer. A Global Timer Widget centralizes control of every active timer, allowing a user to start, stop, pause, or resume time tracking for any task or issue without navigating to its individual detail page. Pausing a timer allows the user to attach a note describing the work performed, and that note remains attached to the log after the timer is stopped. Stopping a timer automatically records the elapsed hours to the user's timesheet. Premium and Enterprise plans additionally offer a Floating Timer that remains visible on screen and, when multiple timers are running, displays their combined total.

Procedure: Tracking Time with the Task Timer

1. Open the task or issue list view and locate the assigned task.
2. Click the timer icon to begin tracking.
3. Pause the timer as needed and add a note describing progress.
4. Click the stop icon when the work session ends.
5. Confirm that the logged hours appear correctly in the timesheet.

For work that was not tracked live, Zoho Projects supports manual entry through Timesheet, then Add Time Log, using either a daily entry for a single day or a weekly entry that adds a row for each task worked across the week. A manual entry requires selecting the task or issue, the date, the assigned user, the hours worked, and an approver, and it allows an optional note. Billing classification can be set per entry, and frequently logged task combinations can be pinned for faster future entry.

Procedure: Logging Time Manually

1. Navigate to Timesheet and select Add Time Log.
2. Choose Daily or Weekly entry mode.
3. Select the task or issue, the date, and the assigned user.
4. Enter the hours worked and an optional note.
5. Confirm the billing classification, checking or unchecking Billable as appropriate.
6. Select an approver, if required, and save the entry.

Best Practice

Instruct client teams to log time daily rather than reconstructing a full week from memory at week's end, since same-day entries produce more accurate hours and reduce disputes during timesheet approval.

Common Pitfall

Leaving a timer running in the background while switching between unrelated tasks inflates logged hours; enabling the Floating Timer for teams on Premium or Enterprise plans keeps the running timer visible and reduces this risk.

4.2 Timesheet Views: List and Calendar

Zoho Projects presents logged time through two complementary views. The Time Logs List View organizes entries by day for a selected period and displays details such as billing type, approval status, and user name, along with any custom fields configured on the time log layout. An advanced date picker allows the period to be narrowed to a single day, a week, a month, a custom range, or the full project duration, and entries can be grouped either by date in reverse chronological order or by user in alphabetical order. A filter icon allows entries to be narrowed by criteria such as approval status, which is particularly useful when preparing a billing run.

Verification Note

Zoho's documentation frames "daily" and "weekly" time reporting primarily as date-range selections within the List View rather than as two permanently separate named views; the Calendar View is the distinct secondary view. Consultants should verify current terminology in the live portal before presenting this distinction to a client as a fixed product feature.

The Calendar View organizes time logs by month and displays them against their corresponding dates, with a running total shown by week and by month in the final column. Hovering over a date and clicking the add icon opens a quick entry form for logging time directly from the calendar, including project, task or issue, date, assigned user, and billing type. Clicking an existing entry on the calendar opens its details in list format, and a filter icon in the upper right allows the displayed entries to be narrowed by criteria such as user or project.

Procedure: Reviewing Time Logs in Calendar View

1. Open the project and select Time Logs.
2. Choose Calendar from the view dropdown.
3. Use the filter icon to narrow the displayed entries if needed.
4. Click any logged entry to view its full detail in list format.
5. Review the weekly and monthly totals shown in the calendar's final column.

Best Practice

Have project managers review the Calendar View at the close of each week rather than only at month end, so that missing or anomalous entries can be corrected while the work is still fresh in the team's memory.

4.3 Timesheet Approval Workflows

Timesheet approval is available on the Express, Premium, and Enterprise plans and allows submitted time logs to be reviewed before they are billed. Each entry carries an approval status of Pending, Approved, or Rejected. Entries can be approved or rejected individually or in bulk from the timesheet view, and a rejection can include a stated reason. An approved entry cannot be edited directly; its status must first be reverted to Pending or Rejected before changes are permitted. Critically, only approved time log entries are eligible to be billed when an invoice is generated.

Beyond manual approval, Zoho Projects supports Approval Rules that automate how submitted timesheets move through one or more approval levels based on defined criteria. Approval Rules are configured under

Settings, Automation, and Approval Rules, where a rule is named, given optional criteria such as project name, and assigned an approval flow of Set Rules, Auto-Approve, or Auto-Reject. Approvers can be defined as individual users, user profiles, entire teams, or the submitter's reporting hierarchy, and a rule can require that any single designated approver approve the timesheet or that every designated approver approve it in sequence. Rules can be reordered by priority, activated, or deactivated, though a rule can only be deactivated once every timesheet associated with it has reached a final approved or rejected status.

Procedure: Configuring a Timesheet Approval Rule

1. Navigate to Settings, then Automation, then Approval Rules.
2. Create a new rule and provide a name and optional description.
3. Define the criteria that determine which timesheets the rule applies to.
4. Choose the approval flow: Set Rules, Auto-Approve, or Auto-Reject.
5. Select the approver type: individual users, profiles, teams, or reporting hierarchy.
6. Choose whether any one approver or every approver must sign off.
7. Enable reminders if desired and save the rule.

Best Practice

Configure approvers using the Reporting Hierarchy option rather than naming individuals directly, so the approval chain continues to function correctly as staff join, leave, or change managers without requiring the rule to be rebuilt.

Common Pitfall

Attempting to deactivate an approval rule while it still has timesheets in Pending status will fail; all associated entries must first be resolved to Approved or Rejected.

4.4 Billable vs. Non-Billable Hours

Billing classification in Zoho Projects can be controlled at both the task level and the individual time entry level. A task's billing type, set to None, Billable, or Non-Billable, establishes the default behavior for time logged against it, while each individual time entry also carries its own Billable checkbox that a user can uncheck when a specific session of work should not be billed regardless of the task's default. Billing type can additionally be changed in bulk across multiple time entries at once, which is useful when a task's billing classification changes retroactively.

Because only approved and billable time log entries are pulled into an invoice, the interaction between approval status and billing classification is what ultimately determines what a client is charged. An entry that is billable but still Pending, or one that has been marked Non-Billable regardless of approval status, will not appear on a generated invoice.

Best Practice

Set the correct billing type at task creation rather than relying on staff to remember to adjust it on every time entry, since a task-level default reduces the chance that billable work is accidentally logged as non-billable.

Common Pitfall

Assuming that an approved time entry will automatically be invoiced without checking its individual Billable flag; an entry that was manually marked non-billable during logging will be excluded from invoicing even after approval.

4.5 Project Budgets: Hours-Based and Cost-Based

Zoho Projects supports budgeting at four levels of granularity: the overall project, an individual phase, an individual task, and an individual user. Budgets can be defined in two ways. An hours-based budget allocates a fixed number of work hours, and the platform compares planned hours against actual logged hours to surface variances; Zoho's documentation illustrates this with a milestone budgeted for one hundred hours where a team logging twenty-six hours against a planned twenty within the first six days signals a need for intervention. A cost-based budget instead allocates a fixed monetary amount, and Zoho Projects calculates expenditure by multiplying logged hours by the applicable rate.

The rate used in these calculations depends on the billing method selected for the project. Staff Hours billing derives cost from each individual team member's rate, so planned cost equals planned hours multiplied by staff rate and actual cost equals logged hours multiplied by staff rate. Project Hours billing applies a single rate across the whole project, so planned and actual cost are calculated using total work hours and total logged hours respectively at that one rate. Fixed Cost billing assigns a flat amount to the project regardless of hours worked, which means budget tracking by percentage of hours consumed is not meaningful under this method. A fourth method, Task or Issue Hours, applies independent rates per task or issue type.

Procedure: Setting Up a Project Budget

1. Open the project's settings and locate the Budget section.
2. Choose the budget scope: project, phase, task, or user.
3. Choose the budget type: hours-based or cost-based.
4. Select the billing method: Staff Hours, Project Hours, Fixed Cost, or Task/Issue Hours.
5. Enter the budgeted hours or cost figure and the applicable rate per hour, if relevant.
6. Save the configuration; Zoho Projects recalculates budget figures automatically approximately every six hours.

Zoho's documentation defines the core budget formulas as planned cost equal to planned hours multiplied by cost per hour, actual cost equal to billable logged hours multiplied by cost per hour, cost variance equal to planned cost minus actual cost, and forecasted cost derived from remaining percentage of work multiplied by planned cost, added to actual cost already incurred. Budget figures surface on the project dashboard, individual task lists, phase overviews, and the portal-wide project listing.

Best Practice

Select the Staff Hours billing method for engagements staffed with a blended team of consultants at different rates, since it produces the most accurate cost picture when hourly rates vary by person rather than by project or task.

Common Pitfall

Choosing Fixed Cost billing and then expecting the system to report budget consumption as a percentage of hours used; because Fixed Cost decouples the invoice amount from hours logged, percentage-based budget tracking is not available under that method.

4.6 From Timesheets to Invoices: Zoho Books/Invoice Integration

Zoho Projects integrates with Zoho Books and Zoho Invoice through the Zoho Finance Suite integration, allowing approved, billable time logs to be converted directly into client invoices. The integration is activated from the Marketplace within the portal, after which an administrator configures preferences including the invoice start date, which marks all time logs recorded prior to that date as already invoiced, the user profiles granted finance-related permissions, and whether expense tracking should also be enabled. The integration also allows administrators to specify how duplicate customer records between the two systems are handled, either by overwriting the existing record in Zoho Books or by cloning it as a separate contact.

Once configured, the integration syncs customers, projects, tasks, issues, and timesheets bidirectionally between Zoho Projects and Zoho Books or Zoho Invoice. Four billing methods carry through to invoice generation: Staff Hours, where individual team member rates determine the invoiced amount; Project Hours, where a single fixed hourly rate is applied across all logged time; Fixed Price, where a flat project cost is invoiced regardless of hours; and Task/Issue Hours, where different rates apply depending on the type of work performed.

Procedure: Generating an Invoice from Logged Time

1. Confirm that the Zoho Books or Zoho Invoice integration is active and that the customer and project are correctly synced.
2. Ensure that all relevant time log entries have reached Approved status.
3. Confirm that each entry intended for billing has its Billable flag checked.
4. In Zoho Books or Zoho Invoice, select the synced project and generate an invoice from the approved, billable time logs.
5. Review the draft invoice against the project's billing method before sending it to the client.

Best Practice

Complete the full timesheet approval cycle for a billing period before initiating the invoice run in Zoho Books, since only approved entries are pulled into the invoice and a late approval after the invoice is generated will require a manual correction.

Common Pitfall

Overlooking the customer duplication setting during integration setup can create duplicate contact records in Zoho Books when a customer already exists there under a slightly different name than in Zoho Projects; reviewing the overwrite-versus-clone configuration before the first sync helps avoid a fragmented client billing history.

Sources

- [Task and Issue Timers | Online Help | Zoho Projects](#)
- [Log Hours | Online Help | Zoho Projects](#)

- [Timesheet Calendar View | Online Help | Zoho Projects](#)
- [Timesheet List View | Online Help | Zoho Projects](#)
- [Approve Timesheets | Online Help | Zoho Projects](#)
- [Approval Rules for Timesheet | Online Help | Zoho Projects](#)
- [Project Budget | Online Help | Zoho Projects](#)
- [Project budget | Tutorial | Zoho Projects](#)
- [Zoho Finance Suite Integration | Online Help | Zoho Projects](#)

Chapter 5: Issue Tracking (Bug Tracker)

5.1 Enabling and Configuring the Issues Module

The Issue Tracker in Zoho Projects allows a delivery team to log, triage, and resolve defects, quality problems, and other unplanned work items within the context of a project. Zoho positions the module as suitable for software quality assurance as well as non-software use cases, including construction punch-list items and marketing content corrections. Because the Issues module is one of several project modules that can be toggled on or off, a ClearPath consultant configuring a new portal must confirm the module is active before instructing a client team to use it.

Modules, including Issues, are managed from the Modules and Tabs area of project settings. An administrator can enable or disable any listed module for a project by toggling its switch in the Modules and Tabs list view. This same area is also where an organization can build entirely custom modules, which is useful when a client requires an issue-adjacent workflow that the standard Issue Tracker does not support.

Once enabled, the Issue Tracker exposes a Configuration screen with two administrative settings that ClearPath should review during implementation. The first is client permissions, which sets the default access level that client-type portal users have to project issues, including whether issues can be assigned to client users at all. The second is email settings, which allows issues to be created automatically by forwarding email to a dedicated POP address provided by Zoho Projects.

Procedure: Enable the Issues module and configure client access

1. Open the project and navigate to Settings.
2. Select Customization, then Modules and Tabs.
3. Locate Issues in the module list and toggle the switch to ON.
4. Return to Settings and select Issue Tracker, then Configuration.
5. Choose the client permission level that should apply to client-type users by default.
6. Click Update to save the configuration.

Best Practice

Confirm client permission defaults for the Issue Tracker during the discovery phase of an engagement, particularly for consultancies like ClearPath that manage portals with external client users. Leaving default permissions unreviewed can expose internal defect notes to clients who should only see resolution status.

Common Pitfall

Implementers sometimes assume the Issues module is enabled by default across every project template. Because module visibility is configured per project, a project cloned from a template that has Issues disabled will silently hide the module from end users, leading to confusion during user acceptance testing.

5.2 Creating and Managing Issues

Zoho Projects supports several entry points for logging a new issue, which gives teams flexibility depending on where they are already working. Issues can be submitted from the global Overview screen, from within the List view of a specific project's Issues module, from the Kanban view, or directly from an existing task by associating an issue with that task. In every case the issue requires a title and, in most workflows, an assignee, after which both default and custom fields on the layout become available for completion.

Every issue is assigned a unique, human-readable identifier composed of a project prefix and a sequential number, such as "TW-I1." This identifier cannot be edited manually and is generated automatically at the moment the issue is created, which makes it a reliable reference when discussing defects in email, chat, or client status reports.

The Issue Details page is the working record for a single issue once it exists. From this page a user can edit the assignee and associated team, apply tags, set a due date and reminder, change status, record severity, classification, module, and reproducibility, attach files and screenshots, add threaded comments, log time spent on resolution, link related issues and tasks, and review a full activity history including status timeline and changesets. Issues can also be cloned, moved to a different project, and followed by additional team members who want visibility without being the assignee.

Procedure: Submit a new issue from the Issues list view

1. Open the project and select Issues from the top navigation band.
2. Click Submit Issue in the entry cell at the top of the list.
3. Enter the issue title and press Enter to create the record.
4. Open the newly created issue and complete the assignee, severity, classification, and any other required fields.
5. Save the record.

Best Practice

Standardize the issue title format across a client engagement, for example "[Module] Short description," so that exported issue lists and Kanban cards remain scannable as the backlog grows.

Common Pitfall

Because the title field alone is sufficient to create an issue from the list view, teams under time pressure frequently submit bare-title issues and never return to complete severity, classification, or module fields, which degrades the quality of later reporting.

5.3 Severity, Priority, and Classification

Zoho Projects distinguishes several related but distinct fields on an issue record that together describe how serious a defect is and how it should be categorized. Severity measures how seriously the defect affects the application or deliverable. Classification groups issues into a type, with examples cited in Zoho's own documentation including Security, Crash/Hang, and Data Loss. Module identifies the affected system component, Reproducible captures how consistently the defect can be reproduced, and Affected Milestone and Release Milestone record, respectively, the milestone in which the defect was found and the milestone in which its fix is targeted for release.

All of these fields, including severity and classification, are implemented as standard fields on the Issues layout, which means an administrator can edit their available values, reorder them, or supplement them with entirely new custom fields of text, numeric, date, or other types through the Customization area. This allows a consultancy to tailor the vocabulary of severity and classification to match a specific client's existing QA or support terminology rather than forcing the client to adopt Zoho's out-of-the-box labels.

Verification Note

The fetched Zoho documentation confirms that Severity and Classification exist as configurable fields and gives illustrative values for each, but it does not publish a single authoritative list of the exact default severity levels shipped with a new portal. A ClearPath consultant should verify the live default values inside the target portal rather than assuming a specific fixed set such as "Critical, Major, Minor, Trivial."

Procedure: Customize severity or classification values for a client

1. Open Settings and select Customization, then Layouts and Fields.
2. Select Issues, then choose the layout to edit.
3. Locate the Severity or Classification field and open its settings.
4. Add, rename, reorder, or remove values to match the client's terminology.
5. Save the layout and apply the changes.

Best Practice

Map a client's existing severity or triage vocabulary (from a legacy help desk, spreadsheet, or QA tool) to Zoho's Severity and Classification fields during data migration planning, rather than migrating historical data as free-text notes.

5.4 Issue Workflows and Custom Statuses

Issue status in Zoho Projects is governed by a configurable workflow rather than a fixed list of states. Every portal ships with a working set of statuses, documented as Open, In Progress, To Be Tested, Closed, and Reopen, each representing a distinct point in the defect lifecycle. An administrator can add further custom statuses, and every status must be categorized as belonging to either the Open type or the Closed type. The system enforces that a workflow contain at least one Open status and at least one Closed status at all times, and it prevents the default status from being deleted.

Workflow configuration also defines which statuses are legal "next steps" from any given status, effectively constraining how an issue can move through its lifecycle. This is enforced visually and functionally in the Kanban view, where each column represents a status and a card can only be dragged into a column that the workflow permits as a valid transition. Kanban views can additionally be built around Severity, Module, Classification, or Reproducibility rather than Status, letting a team visualize the backlog from more than one angle.

Beyond manual status changes, Business Rules extend the workflow with automation. A rule is defined by a trigger, criteria (which can be combined with AND/OR logic and can reference custom fields as well as affected and release milestones), and one or more actions such as updating a field, invoking a webhook, executing a custom function, or updating a linked Zoho Desk ticket. When multiple business rules apply to

the same issue, they execute in the order they appear in the rule list, and a rule can be configured to trigger the next rule in sequence.

Procedure: Configure the issue status workflow

1. Open Settings and select Customization, then Layouts and Fields.
2. Select Issues, then open the layout to configure.
3. Click the settings icon next to Status & Workflow.
4. Set the default status under Set Default Status.
5. Click + Add Status to create a new status, assign it an Open or Closed type, a name, and a color.
6. For each status, select which other statuses are valid next steps in the workflow.
7. Click Done, then Apply Changes to save the workflow.

Procedure: Create a business rule for issues

1. Open Settings and select Issue Tracker, then Business Rule.
2. Click Add Rule and name the rule.
3. Choose the trigger event that should evaluate the rule.
4. Define the criteria, combining conditions with AND or OR logic as needed.
5. Configure the action or actions the rule should perform when criteria are met.
6. Save the rule, then reorder it relative to other rules if execution order matters.

Best Practice

Keep the number of Open-type statuses small and semantically distinct (for example, Open, In Progress, To Be Tested) so that Kanban boards and status reports remain easy to interpret across a client's whole team.

Common Pitfall

Deleting a status that still has issues assigned to it, or reconfiguring workflow transitions without communicating the change, can strand issues in a status team members can no longer select as a next step, which forces a manual cleanup pass.

5.5 Assigning and Linking Issues

An issue can be assigned to an individual user through the Assignee field, and Enterprise-plan portals can additionally assign an issue to a team through an Associated Team field. Team assignment in the Issue Tracker is constrained to a single team per issue, though multiple members of that team may be selected as assignees; if a team is applied to an issue that already has assignees outside that team, those outside assignees are automatically removed. Before Associated Team can be used, an administrator must add the field to the Issues layout through Customization, since it is not present on a layout by default.

Issues can also be linked to other issues and to tasks, which is essential for tracing defects back to the work item that introduced them or that will implement the fix. Zoho Projects supports five link types between issues: Blocks, Depends On, Is Related To, Is Duplicate Of, and Is Clone Of. Blocks and Depends On are enforcement relationships, meaning a blocked or dependent issue cannot be closed until the issue it relies on is closed first. Is Related To, Is Duplicate Of, and Is Clone Of are informational relationships that do not

restrict closing. A single issue can carry a maximum of ten linked issues, and only one link type can exist between any given pair of linked issues.

Procedure: Link an issue to a task or another issue

1. Open the project and select Issues.
2. Open the issue that needs to be linked.
3. Select the Link Issues tab (or the Tasks section, for linking to a task).
4. Choose the desired link type from the dropdown.
5. Search for the target issue or task by title or ID and select it.
6. Click Link Issues (or the equivalent confirm action) to establish the connection.

Best Practice

Reserve the Blocks and Depends On link types for genuine sequencing dependencies rather than general association, since these link types actively prevent closing an issue and can create hidden bottlenecks in a sprint if overused.

Common Pitfall

Closing an issue that has been marked as a duplicate of another does not automatically close the related duplicates, so teams relying on link types to bulk-resolve near-identical issues must close each one individually.

5.6 Custom Views, Filters, and Reporting on Issues

Zoho Projects offers List and Kanban presentations of the Issues module, and both support custom views that persist a saved combination of filters, columns, and sharing settings. A custom view can be built from scratch through the "+ Create Custom View" option in the view dropdown, or derived from an ad hoc filter by clicking Find and then Save As. Every custom view can be scoped for personal use, shared with all users, or shared with a specific set of users, and it can optionally be surfaced in the global cross-project Issues screen as well as within a single project. Views can be marked as favorites and set as the default view a user sees on return visits.

The List view additionally allows column-level customization independent of saved views. Columns can be added from any default or custom field, reordered by drag-and-drop, and managed through a right-click menu that offers Apply Filter, Insert Column Before, Insert Column After, and Hide Column. This makes it possible to build a working list tailored to a specific triage meeting without altering the underlying saved view.

For point-in-time analysis and client-facing status reporting, Zoho Projects provides a dedicated Issue Reports feature, available on Premium and Enterprise plans and reached through the project's Reports navigation. Basic issue reports present status distributions in graphical and tabular form, with the ability to click into a given bar to see the underlying issues. Advanced issue reports add three purpose-built analyses: an Issue Owner Status Report showing how many issues each user holds at each workflow stage, an Issue Owner Escalation Report showing escalation activity by user, and a Created vs. Closed Report comparing issue creation and resolution timing with statistical measures such as count, sum, average, minimum, and maximum. Chart type, axis fields, grouping, and filters for these reports are configured from a settings icon within Issue Reports, and completed reports can be exported to PDF.

Issue data can also be exported directly from the List view in XLSX or CSV format, filtered and column-selected before export, and this export can be scheduled to run once or on a recurring hourly, daily, weekly, or monthly cadence, with export history retained and manageable centrally.

Procedure: Build and save a custom issue view

1. Open the project and select Issues, then choose List or Kanban view.
2. Open the View dropdown and select + Create Custom View.
3. Define the filter criteria, adding additional criteria as needed.
4. Enter a name and, optionally, a description for the view.
5. Choose whether the view is personal, shared with all users, or shared with specific users.
6. Set whether the view should also appear in the global cross-project Issues screen.
7. Click Save.

Procedure: Generate and export an advanced issue report

1. Open the project and select Reports from the top navigation band.
2. Choose Issue Reports from the dropdown panel.
3. Select an Advanced Report type: Issue Owner Status, Issue Owner Escalation, or Created vs. Closed.
4. Open the settings icon to configure chart type, X and Y axis fields, grouping, and filters.
5. Review the report, then use the export option to save it as a PDF.

Best Practice

Build one shared, portal-wide custom view per client stakeholder group (for example, "Open Critical Issues – Client View") rather than relying on ad hoc filtering, so recurring status conversations start from the same data every time.

Verification Note

The Issue Reports feature is documented as being restricted to Premium and Enterprise plans. ClearPath should confirm current plan-level availability against the client's active subscription, since Zoho periodically revises which reporting capabilities are bundled into each plan tier.

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- [How to configure issue, status and workflow for my issue tracker?](#)
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- [Project Level Issue Reports | Online Help | Zoho Projects](#)
- [Schedule Export for Issues | Online Help | Zoho Projects](#)

Chapter 6: Collaboration Tools

6.1 Forums: Topics and Categories

Forums provide a persistent, threaded space for project discussion, distinct from the transient nature of chat or email. Zoho positions Forums as a way to retain institutional knowledge, escalate critical issues to subject-matter experts, and let geographically distributed team members deliberate asynchronously, since all topics live at a central location rather than scattered across individual inboxes.

Every forum topic is created within a category, and categories exist to keep a growing volume of topics sortable and easy to browse. An administrator or authorized user can add, edit, or remove categories independently of the topics posted within them. When creating a topic, the author selects a category, provides a title and content, optionally attaches files, and chooses a post type: Sticky Post, which stays pinned at the top of the forum; Announcement, which notifies all project users; or Q&A, which frames the topic as a question for the team to answer. Each topic also carries a privacy flag of Internal, visible only to project users, or External, visible to client users as well, which lets a consultancy control what client stakeholders see in the discussion stream.

Forum topics support tagging, following, and commenting by email in addition to standard replies, and a topic can be moved between categories or copied by link. Notably, a forum topic can be associated directly with a task, so that a discussion thread and the work item it concerns appear together on the task's detail page.

Procedure: Create a forum category and post a topic

1. Open the project and select Forums.
2. Click the menu icon in the upper-right corner and select Add Category.
3. Name the category and save it.
4. Click New Forum Post.
5. Enter a title and content, attach files if needed, and select the category just created.
6. Choose a post type: Sticky Post, Announcement, or Q&A.
7. Set the privacy flag to Internal or External.
8. Click Publish.

Best Practice

Establish a small, fixed set of forum categories at project kickoff (for example, Decisions, Risks, Client Questions) rather than letting categories proliferate ad hoc, so the forum remains a reliable knowledge repository rather than a disorganized message board.

Common Pitfall

Because the External privacy flag exposes a topic to client users, teams that default to Internal for convenience risk having genuinely client-relevant decisions buried where the client never sees them, undermining the transparency Forums are meant to provide.

6.2 Chats

Chat, formerly named Discuss within Zoho Projects, is the platform's real-time messaging layer, intended for synchronous conversation rather than the persistent record-keeping that Forums provide. It supports both private and public conversations depending on the business need, along with screen sharing and audio/video meetings for situations that benefit from a live discussion rather than text alone.

A conversation in Chat is created explicitly, with a project association, a title, and a defined set of participants, which distinguishes it from an open-ended channel model. Chat transcripts can integrate with Zoho Cliq for longer-term record-keeping, and, where Zoho People integration is enabled, user status can reflect availability. A Check In capability is also available for tracking daily logins. At the organization level, a Portal Owner or Admin can disable Chat entirely through Marketplace settings if a client prefers to standardize on a different communication tool.

Procedure: Start a new Chat conversation

1. Select Collaboration from the left navigation panel.
2. Select the Chat tab in the top navigation.
3. Click New Conversation in the upper-right corner.
4. Choose the project the conversation relates to.
5. Enter a conversation title and add participants.
6. Click Add to open the chat window.

Best Practice

Reserve Chat for time-sensitive coordination and route any decision or finding that needs to be retrievable later into a Forum topic or the relevant task or issue comment, since Chat is optimized for immediacy rather than long-term searchability.

Verification Note

The fetched documentation for Chat describes both private and public conversation modes at a high level but does not enumerate the exact permission differences between them in detail. A ClearPath consultant configuring Chat for a client with strict confidentiality requirements should verify current behavior directly in the target portal before relying on it as an access-control boundary.

6.3 Feeds: The Project Activity Stream

The Feed is Zoho Projects' automated activity stream, surfacing project events and team status updates in a single location under the Collaboration section. It combines two views: a Status tab showing recently posted status updates from team members, and an Activity Stream showing what colleagues have been working on, browsable by user and by timeframe.

By default, Feed shows activity across all projects a user has access to, which can be noisy on a portal managing many concurrent engagements. A Select Project dropdown narrows the stream to a single project, reducing clutter for a user who only needs visibility into one client's work at a time. From the Feed, a user can also click into a colleague's profile image to view their details, send them a direct message, start a Chat with them, or follow them to receive ongoing visibility into their activity.

Procedure: Filter the Feed to a single project

1. Select Collaboration from the left navigation panel.
2. Select the Feed tab.
3. Open the Select Project dropdown.
4. Choose the project whose activity should be displayed.

Best Practice

Encourage team members to post brief status updates to the Feed at the start and close of each working day on client engagements, since it gives a project manager a lightweight, low-friction pulse on progress without requiring a separate status meeting.

Common Pitfall

Because the default Feed view spans every project a user can access, new team members added to a large portal are often shown an overwhelming, unfiltered stream on their first login, which can obscure the specific project updates they actually need to see.

6.4 Documents: File Storage, Versioning, and Sharing

The Documents module is Zoho Projects' file storage and management layer, built on Zoho's underlying document infrastructure and accessible from a project's top navigation. Files can be viewed in Thumbnail, List, or Compact layouts, sorted by name, last modified date, or creation time, and filtered by type, including folders, drafts, documents, spreadsheets, presentations, PDFs, images, audio, and video.

Right-clicking a file exposes the module's core operations. Files can be opened or previewed without a full load, shared with specific members at a chosen permission level, or distributed through time-limited, usage-restricted download links. Version control is built in: uploading a new version of a file with accompanying notes increments the version number in a predictable pattern such as 1.0 to 1.1 to 2.0, preserving prior versions for reference. A checkout system allows a user to lock a file for exclusive editing, during which other users continue to see the last checked-in version until it is checked back in. Files can also be renamed, moved between folders, labeled, favorited, commented on with @mentions, and sent to trash when no longer needed, and selected files can be bulk-downloaded or have their links bulk-copied.

Sharing is governed by a distinct permission model. Only the Portal Owner and users with an Admin profile can share files. A file can be shared with a named individual at a chosen access level, with all team members and shared collaborators via a visibility setting, portal-wide with anyone in the organization's team, or, for external distribution, with anyone on the internet through a public link, optionally with an expiration date.

Procedure: Share a file with a client outside the portal

1. Locate the file in Documents and right-click it.
2. Select Share.
3. Enter the external recipient's email address.
4. Click Change Visibility.
5. Select Anyone on the Internet.
6. Set an optional expiration date and save to complete the share.

Best Practice

Set expiration dates on any externally shared link that contains client-sensitive project files, since a link shared with "Anyone on the Internet" otherwise remains accessible indefinitely unless manually revoked.

Common Pitfall

Because only Portal Owners and Admins can share files, teams frequently discover mid-engagement that a project coordinator without an Admin profile cannot share a deliverable with the client, causing an avoidable delay at a critical handoff moment.

6.5 Pages: Wiki-Style Knowledge Pages

Pages functions as an integrated wiki for a project, letting a team build, organize, and maintain a knowledge base rather than scattering reference material across chat history or file attachments. Zoho cites use cases spanning construction site guidelines, HR onboarding material, and sales product information, all benefiting from the same core capability: centralized, hierarchically organized, collaboratively editable documentation.

Pages support a parent-child structure, so a top-level page can have subordinate pages nested beneath it, and the full hierarchy can be visualized through a Site Map view with expand-all and collapse-all controls. Individual pages support comments and file attachments, including direct import from Google Docs, which allows a team to bring existing reference material into the wiki without retyping it.

According to Zoho's documentation, all portal users hold full permissions across all Pages operations, meaning there is no built-in per-page restriction separating who can view, edit, or delete a given page. This has direct implications for client-facing portals, where a consultancy may want internal process documentation kept separate from anything a client can see or modify.

Procedure: Create a new page and a sub-page

1. Select the project from Recent Projects or the Projects tab.
2. Select the Pages tab in the top navigation.
3. Click Create New Page in the upper-right corner.
4. Enter a page name and select a page type.
5. Choose Root Level to create a new parent page, or select an existing page as the location to create a child page.
6. Click Create.
7. To add further structure later, open the parent page, select Page Options, and choose Add Sub Page.

Best Practice

Establish a documented page hierarchy convention (for example, one root page per project phase, with sub-pages for artifacts and decisions) at the start of an engagement, since Pages has no enforced structure of its own and will otherwise grow inconsistently across projects.

Common pitfall and best practice: Because all portal users share full permissions on Pages, teams sometimes discover that a client user has inadvertently edited or deleted internal documentation. ClearPath should

keep any content not intended for client eyes in a project where client users are not portal members, rather than relying on Pages-level access control that does not exist.

6.6 Integrating Collaboration Tools into the Daily Workflow

Forums, Chat, Feed, Documents, and Pages are complementary rather than redundant, and a well-run project typically maps each tool to a distinct communication need. Chat serves synchronous, time-sensitive exchanges that do not need to be preserved as formal records. Forums capture asynchronous discussion and decisions that the team should be able to retrieve later, organized by category so the reasoning behind a decision remains findable months afterward. Feed gives a lightweight, ambient view of what is happening across the team without requiring anyone to actively check in with colleagues. Documents centralizes deliverables and working files with version history and controlled sharing, replacing ad hoc email attachments. Pages holds durable, structured reference material, such as standard operating procedures or onboarding guides, that is meant to be read rather than discussed.

Used together, these tools let a project reduce its dependence on external email and generic chat tools, keeping project-related communication, decisions, files, and documentation inside the same portal where tasks and issues already live. For a consultancy such as ClearPath, this consolidation is also a client value proposition: a client stakeholder who wants a status update, a past decision, a shared file, or a process document can find all of it within the same Zoho Projects portal rather than searching across disconnected systems.

Best Practice

During onboarding, give each client team a short, explicit convention for which tool to use for which purpose (for example, "decisions and open questions go in Forums, files go in Documents, day-to-day chatter goes in Chat") since new users otherwise default to whichever tool is most familiar from prior software, fragmenting the project record across tools inconsistently.

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- [Manage Files | Online Help | Zoho Projects](#)
- [Share Files | Online Help | Zoho Projects](#)
- [Pages | Online Help | Zoho Projects](#)
- [Project Collaboration Software & Tools - Zoho Projects](#)

Chapter 7: Automation & Blueprints

Zoho Projects provides two complementary automation layers that consultants at ClearPath Consulting, LLC configure during implementation: Business Rules, which apply conditional trigger-based logic to projects, tasks, and issues, and Blueprints, which model a structured, multi-stage business process as a sequence of statuses and transitions. Used together with task-level automation such as recurring tasks and time-based rules, these tools remove a substantial share of the manual administrative work that project managers would otherwise perform by hand, including status updates, reassignments, and reminder emails. This chapter documents each mechanism, the configuration steps involved, and the governance practices ClearPath applies when designing automation for a client portal.

7.1 Business Rules for Projects and Tasks

Workflow rules in Zoho Projects operate on a trigger-condition-action model. A rule requires a trigger that causes it to execute and at least one action that is carried out automatically once the trigger fires and the rule's conditions are satisfied. Triggers fall into two categories. User-action-based triggers fire on specific events such as project or task creation or a field update. Time-based triggers fire on a schedule tied to a date field, such as before, on, or after a start date, creation date, or due date, and can be configured to run once or to recur.

Conditions allow multiple criteria to be combined within a single rule. The rule engine evaluates conditions sequentially and exits after the first matching condition without checking any subsequent ones, which means the order in which criteria are arranged inside a rule has a direct bearing on which action ultimately fires. When a condition is satisfied, the rule can automatically update a project or task field, send an email notification or alert, execute a custom function, or trigger a webhook to an external system.

Workflow rules are associated with a specific project or task layout, and a client portal can apply a rule to a single layout or to all layouts. A maximum of twenty workflow rules can be created or associated per layout. Rules do not trigger on the "Create" condition for projects that are generated from an existing template, and time-based triggers cannot be applied to all layouts simultaneously; each layout must be selected individually.

Procedure: Configuring a Workflow Rule for Tasks

1. Open the task layout settings for the project template or portal layout the rule should govern.
2. Define the trigger by selecting either a user-action event, such as task creation or a specific field change, or a time-based schedule tied to a date field such as the start date or due date.
3. Build the rule's criteria, combining multiple conditions where necessary, and arrange them in the order they should be evaluated, since the engine stops at the first match.
4. Define the action or actions to run automatically, such as updating the Associated Team, Status, or Priority field, sending an email alert, invoking a custom function, or calling a webhook.
5. Save the rule and confirm it is associated with the correct layout, keeping in mind the twenty-rule-per-layout limit.

Best Practice

Order conditions within a rule from most specific to most general, since the engine exits at the first matching condition and will never evaluate the ones that follow.

Common Pitfall

Implementers frequently exceed the twenty-rule-per-layout limit by creating narrow, single-purpose rules instead of consolidating related conditions into a single rule with multiple criteria, which causes later rules to silently fail to save or to be rejected during activation.

Verification Note

The documentation ties full workflow rule functionality to what it describes as the "Latest user based Enterprise plan." Because Zoho periodically renames and restructures its plan tiers, ClearPath confirms current plan-level automation entitlements against the client's live portal rather than relying on this label alone.

7.2 Business Rules for Issue Tracking

Zoho Projects applies a parallel but distinct rule mechanism to the Issue Tracker module. A business rule for issues functions as a filter that classifies incoming issues and performs automated actions when an issue matches specified criteria. Rule criteria can combine standard issue fields, custom fields, and milestones using either AND logic, which requires every condition to be satisfied, or OR logic, which requires only one condition to match.

When a business rule fires, it can automatically update severity, change status, reassign the issue to a different module or classification, or assign the issue to a team member. Rules can also invoke webhooks, execute custom functions, and, where the Zoho Desk integration is enabled, update a corresponding support ticket. When a portal has multiple business rules, they are applied to an issue according to the rule list order, and a rule can be configured to continue evaluating the next rule in the list rather than stopping after the first match.

Procedure: Creating a Business Rule for Issues

1. Open the Issue Tracker automation settings and create a new business rule with a descriptive name.
2. Select the Execute On trigger that determines when the rule fires, such as issue creation or a field update.
3. Build the rule's criteria using AND logic when every condition must be met or OR logic when a single matching condition is sufficient, drawing on standard fields, custom fields, and milestones.
4. Define the automated actions to run when the criteria are met, such as updating severity, status, or assignment, calling a webhook, or executing a custom function.
5. Decide whether the rule should stop evaluation after firing or continue to the next rule in the list, then save the rule and confirm its position in the overall rule order.

Best Practice

When a portal relies on several issue business rules, document the intended rule list order in the project charter, since execution order determines which rule's action ultimately applies to a given issue.

Common Pitfall

Teams often assume every matching rule will run. In practice only the rules that are reached in list

order, and whose "continue to next rule" option is enabled, will actually execute, so a high-priority rule placed after a lower-priority catch-all rule may never fire.

7.3 Blueprints: Structured Process Workflows

A Blueprint models a multi-stage business process as a network of statuses connected by transitions, giving ClearPath a way to enforce a client's actual approval or delivery process inside Zoho Projects rather than relying on informal status changes. Every blueprint must begin at a status named Open and end at a status named Closed, and every status in between must connect to the rest of the workflow through transitions, with each non-Closed status requiring at least one incoming and one outgoing transition.

Each transition is configured across three phases. The Before Transition phase controls who is permitted to execute the transition, through a combination of named users, roles, and criteria-based conditions; users, teams, and profiles selected here can perform the transition regardless of the task permissions otherwise assigned to their profile. The During Transition phase can prompt the user executing the transition to complete mandatory or optional fields and read a confirmation message before the transition is finalized. The After Transition phase runs automated actions once the transition completes, including sending email alerts to specific users or teams, updating field values such as percentage complete, and calling webhooks, with a maximum of five webhooks permitted per transition.

Blueprints also support Common Transitions, which make a single transition reachable from multiple statuses or from every status in the workflow, and Parallel Transitions, in which multiple branches must all complete before the task's status advances, up to a maximum of four parallel transitions. Once published, transitions appear as buttons on the task details page, so a user progresses a task through the workflow by clicking the appropriate transition rather than manually changing a status field. A blueprint can be applied to an existing task list by mapping the task list's current statuses onto the blueprint's statuses, and it can later be dissociated from the task list if the client's process changes.

Procedure: Designing and Publishing a Blueprint

1. Map the client's actual business process into a sequence of statuses, confirming the workflow begins at Open and ends at Closed.
2. Connect every status to the rest of the workflow with transitions, ensuring each non-Closed status has at least one incoming and one outgoing transition.
3. For each transition, configure the Before Transition phase by specifying the users, roles, or criteria permitted to execute it.
4. Configure the During Transition phase by adding any mandatory or optional fields and confirmation messages required before the transition can be confirmed.
5. Configure the After Transition phase with automated actions such as email alerts, field updates, or webhook calls, keeping within the five-webhook-per-transition limit.
6. Publish the blueprint, then associate it with the relevant task list by mapping existing task statuses to the new blueprint statuses.

Best Practice

Reserve Blueprints for processes that require enforced sequencing, mandatory approvals, or role-restricted transitions, such as change-order approval or client sign-off, and use simpler workflow

rules for routine field updates that do not require a gated, multi-party process.

Common Pitfall

Designers sometimes leave a status with only an incoming transition and no outgoing one, other than Closed. Because every non-Closed status requires both an incoming and an outgoing transition, an incomplete workflow of this kind will block tasks in that status indefinitely until the blueprint is corrected.

7.4 Task-Level Automation: Recurring Tasks and Reminders

Beyond rule-based and blueprint-based automation, Zoho Projects supports automation at the level of an individual task. Recurring tasks allow a task to automatically regenerate on a daily, weekly, monthly, or yearly frequency, which removes the need for a project manager to manually recreate routine deliverables such as weekly status reports or monthly maintenance checks. A recurrence can be tied to a fixed calendar schedule or configured with an On Completion trigger, which starts the next occurrence only once the current occurrence has been marked complete, a pattern suited to tasks whose timing depends on when the prior instance actually finishes rather than a strict calendar date. Task reminders can additionally be set to send timely email notifications based on a task's due date or another specified date, keeping assignees aware of upcoming deadlines without requiring the project manager to send manual follow-ups.

Procedure: Setting Up a Recurring Task

1. Open the task's details view and select the recurrence option.
2. Choose a recurrence frequency of daily, weekly, monthly, or yearly.
3. Choose whether the next occurrence follows a fixed schedule or begins only after the current occurrence is completed, using the On Completion trigger.
4. Save the task so the recurrence pattern takes effect for all future occurrences.

Best Practice

Use the On Completion trigger for recurring tasks whose real-world timing depends on the prior instance finishing, such as a client deliverable that must be reviewed before the next cycle can begin, and reserve fixed-schedule recurrence for tasks tied strictly to the calendar, such as a monthly invoice reminder.

Verification Note

Zoho's documentation does not specify a hard cap on the total number of active recurring tasks permitted within a single project or portal. ClearPath treats any such limit as unconfirmed and validates capacity directly in the client's portal before designing a heavy recurrence-based schedule.

7.5 Time-Based Rules and Reducing Manual Administration

Time-based workflow rules extend the trigger-condition-action model described in Section 7.1 to schedules rather than user actions, and they are the primary mechanism ClearPath uses to automate work that would otherwise depend on someone remembering a date. A time-based rule can be configured to fire on, before, or after a date field such as the start date, creation date, or due date, at a specified time, and with a

frequency of once, every recurring interval, or daily, up to a set number of repetitions. Because time-based triggers cannot be applied to all layouts at once, each layout that should carry a time-based rule must be selected individually when the rule is built.

Taken together, workflow rules, business rules, blueprints, and task-level recurrence give ClearPath a layered automation model. Routine, single-condition updates are handled by workflow and business rules; date-driven reminders and escalations are handled by time-based rules; enforced multi-party processes are handled by blueprints; and repeating deliverables are handled by task recurrence. Zoho positions this combination as a way to help teams get more done in less time by automating "routine, mindless work," and in ClearPath's delivery experience the heaviest administrative burden it removes is the manual status-chasing and reminder-sending that otherwise falls on a project manager during every reporting cycle.

Best Practice / Common Pitfall

Automation should reduce administrative overhead without removing human judgment from decisions that carry client-facing consequences, such as marking a milestone complete or closing a billing period. ClearPath's recurring pitfall in early-stage implementations is over-automating status transitions that a project manager should review manually, which can result in a task or issue advancing, and a client-facing notification going out, before the underlying work is genuinely finished.

7.6 Governance and Change Management for Automation

Because business rules, time-based rules, and blueprints all operate silently in the background once activated, ClearPath treats automation design as a governed configuration activity rather than an ad hoc setting any team member can change. Rule and blueprint changes are documented in the client's implementation record, tested against a representative sample of tasks or issues before being applied portal-wide, and reviewed periodically as the client's process evolves, since a rule or transition that was correct at go-live can become a liability once a client reorganizes a team or changes its approval chain.

Procedure: Reviewing Automation Before a Portal Go-Live

1. Inventory every active workflow rule, business rule, and blueprint in the portal, noting the layout or module each one applies to.
2. Confirm each rule's trigger, condition order, and action against the client's documented process, paying particular attention to rules that exit after the first matching condition.
3. Test each blueprint's transitions with a representative user in each permitted role to confirm the Before, During, and After Transition configurations behave as designed.
4. Confirm the portal is within the twenty-rule-per-layout limit and that no time-based rule was mistakenly left unassigned to a layout.
5. Record the final automation configuration in the client's implementation documentation before go-live.

Best Practice

Assign a single automation owner on the client side who is responsible for approving new or modified rules and blueprints after go-live, so that automation logic does not drift out of alignment with the documented process over time.

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Chapter 8: Reports, Dashboards & Integrations

Zoho Projects gives a project manager visibility into schedule, workload, and financial performance through a combination of built-in reports, a configurable dashboard, and a deep set of integrations with the rest of the Zoho ecosystem and common third-party tools. For ClearPath Consulting, LLC, this reporting and integration layer is what turns a configured portal into an operational system of record that a client's leadership team, finance department, and delivery staff can all rely on. This chapter documents the built-in and custom reporting tools, the Dashboard, the principal Zoho and third-party integrations, and the mobile app.

8.1 Built-In Reports: Task, Time, and Workload Reporting

Zoho Projects ships with a set of built-in report categories accessible through the Gantt & Reports module of a project. These include Planned vs Actual reports, which compare projected schedule and effort against what actually occurred, and Workload reports, which show how work is distributed across team members. Reporting is organized at two scopes: project-level reports specific to an individual project, and portal-level reports that aggregate data across every project in the portal.

Timesheet reporting is a distinct built-in category with its own basic and advanced views. The basic Log Time Summary report shows total hours logged against tasks and issues. Advanced timesheet reports include a Time Sheet Status Summary, which breaks down approved, rejected, and pending hours by user, and a Billable and Non-billable report, which shows how many logged hours are billable versus non-billable for each user. Chart type and visualization format can be changed for these reports, and a dedicated export function is available for moving timesheet data out of the portal for client billing or payroll purposes.

Best Practice

Configure the Billable and Non-billable timesheet report as a standing weekly review for any client engaged on a time-and-materials basis, since it is the fastest built-in way to catch unapproved or unbilled hours before they age into a billing dispute.

Common Pitfall

Because Time Sheet Status Summary separates pending hours from approved hours, portals that never establish a routine timesheet approval cadence can accumulate a large pending balance that never converts into billable revenue, even though the underlying work was actually performed and logged.

8.2 Portal-Level and Custom Reports

Portal-level project reports show project counts against a variety of parameters rather than task- or time-level detail. Basic portal reports include project counts by Status, Owner, Project Groups, and Client Company. Advanced portal reports cross two of these dimensions at once, such as Project Status by Owner, Project Status by Group, Project Status by Client, and Project Group by Owner.

Beyond these predefined views, Zoho Projects allows a user to build a custom report by comparing two criteria drawn from either default or custom fields, choosing a chart type, and assigning fields to the X and Y axes. Custom reports can be grouped and filtered to match a specific client's reporting requirements, which

is useful when a client's leadership wants a recurring view that does not correspond exactly to one of the built-in report templates.

Procedure: Building a Custom Portal-Level Report

1. Open the portal-level Reports module and choose the option to create a custom report.
2. Select the two criteria to compare, drawing on default fields such as status or owner, or on custom fields configured for the portal.
3. Choose the chart type and assign the desired fields to the X and Y axes.
4. Apply grouping and filters so the report reflects only the relevant subset of projects.
5. Save the report so it can be re-run on demand or referenced in a recurring status review.

Verification Note

The documentation states that portal-level reporting features are included in the "latest user-based Enterprise plan." As with workflow rule availability, ClearPath verifies current plan-tier access for reporting features directly in the client's portal rather than relying solely on this description, since Zoho's plan structure is subject to change.

8.3 The Dashboard

The Dashboard consolidates a project's key performance indicators, including progress indicators, graphs, and statistics, into a single view. Progress-tracking widgets include Task Status, Issue Status, and Phase Status, each showing the breakdown of open versus closed work items. Team-performance widgets include Team Status, which surfaces overdue items per user, along with Top 5 Go-getters and Top 5 Issue fixers widgets that highlight individual productivity. Reporting widgets available on the dashboard include a Task Progress Chart, a Weekly Digest, a Timesheet Summary, and a Budget Status widget. Forward-looking widgets include Today's Work Items, Overdue Work Items, and Upcoming Events.

A portal can maintain multiple custom dashboards, each with its own access level of Full Access, Editor, or Viewer, which lets ClearPath build a client-facing executive dashboard that is separate from an internal delivery-team dashboard. Individual widgets can be resized, repositioned, and have their chart type changed, the overall dashboard theme can be adjusted, and a dashboard can be exported to PDF or cloned for reuse across similar projects.

Best Practice

Build a distinct, Viewer-access dashboard for client stakeholders that surfaces only client-relevant widgets, such as Phase Status, Budget Status, and Upcoming Events, and keep internal productivity widgets like Top 5 Go-getters on an internally scoped dashboard, since the latter is rarely appropriate to share externally.

Common Pitfall

Teams sometimes leave every widget at Full Access, which allows any portal user to rearrange or delete widgets from a dashboard that others rely on for a standing status review, silently breaking a client reporting routine.

8.4 Zoho Books and Zoho Invoice Integration for Billing

Zoho Projects integrates with Zoho Books to convert tracked project effort into client billing. Once connected, projects along with their primary customers, tasks, bugs, timesheets, and users are synced into Zoho Books and become accessible through its Time Tracking module. From there, quotes, invoices, recurring invoices, and expenses can be generated directly from the synced project data. Timesheets can be marked as billable or unbilled based on a configurable date threshold, which allows a firm to control exactly which logged hours are eligible for invoicing.

Setup requires admin access in Zoho Books and portal ownership in Zoho Projects. During configuration, the administrator selects which modules to sync, either Projects, Timesheets, or both, and sets a policy for how duplicate customer records are handled: Clone creates a new customer record in Zoho Books, while Overwrite replaces the existing one. Custom fields can be mapped between the two systems as part of setup. Newly created projects can sync instantly, and the integration retains sync history and error tracking so that a failed sync can be diagnosed. The integration can be disabled, re-enabled, or deleted without deleting the underlying project records in either system.

Procedure: Connecting Zoho Projects to Zoho Books

1. Confirm the administrator has both admin access in Zoho Books and portal ownership in Zoho Projects.
2. Navigate to Settings, then Zoho Apps, then Integrations and Marketplace, and select Zoho Books.
3. Choose which modules to sync, selecting Projects, Timesheets, or both.
4. Configure the timesheet billing status threshold and the customer duplication policy, choosing Clone or Overwrite.
5. Map any custom fields that should carry over between the two systems.
6. Initiate the sync and confirm new projects sync correctly by reviewing the sync history for errors.

Best Practice

Set the billable timesheet threshold and approval workflow before turning on the sync, since timesheets that sync as billable before they have been reviewed can produce an invoice built on unapproved hours.

Common Pitfall

Choosing Overwrite as the customer duplication policy without first confirming which system holds the authoritative customer record can silently replace correct billing details in Zoho Books with stale or incomplete data carried over from Zoho Projects.

8.5 Zoho CRM and Zoho Analytics Integrations

The Zoho CRM integration lets a sales team create and manage a project directly from a closed deal without leaving CRM. Projects created inside CRM update the corresponding Zoho Projects account and vice versa, keeping both systems synchronized. A project can be linked to records in the Accounts, Contacts, and Potentials modules, which gives account managers visibility into every project tied to a given customer from within CRM itself, and supports better renewal and upsell conversations because the sales team can see full project history and status without requesting it from delivery staff.

Procedure: Creating a Project from a Zoho CRM Deal

1. Open the relevant Accounts, Contacts, or Deals record in Zoho CRM.
2. Locate the Zoho Projects section in the record's Related List and click New Project.
3. Complete the Project Details, including project name, template, owner, and timeline, along with billing status, method, and budget if the Zoho Books integration is also active.
4. Add team members and assign their project roles, and select which contacts should have client-level access to the project.
5. Save the project. To link an existing project instead of creating a new one, select Associate Project from the record's details page and choose from the projects the user has permission to view.

Zoho Analytics extends reporting beyond what is available natively in Zoho Projects by giving a firm access to more than fifty prebuilt reports and dashboards spanning project status, milestone tracking, planned-versus-actual time, task completion rates, billing hours, revenue projections, and bug distribution and resolution time, along with a drag-and-drop interface for building fully custom reports. The integration is configured from Marketplace, then Zoho Apps, then Zoho Analytics, where the administrator selects which projects to sync and sets a sync schedule of every three, six, twelve, or twenty-four hours; a notification email confirms each successful sync.

Best Practice

Reserve Zoho Analytics for cross-project, executive-level reporting that spans revenue, resourcing, and delivery quality together, since its prebuilt report library is materially deeper than the native portal-level and dashboard reporting covered in Sections 8.1 through 8.3.

8.6 Third-Party Integrations, Source Code Linking, and the Mobile App

Beyond the Zoho ecosystem, Zoho Projects connects to a broad set of third-party tools. Document collaboration integrations include Google Drive, which allows a user to attach Google Docs, Sheets, and Slides files stored in Drive directly to a project's Documents area after authenticating with a Google account, and Dropbox, which supports either a one-time or continuous folder sync between a Dropbox account and a project's Documents area, subject to a 125 MB per-file limit for instant sync and a 300 MB limit for scheduled sync, and is available on Premium and Enterprise plans.

Source-code linking is available for GitHub, Bitbucket, GitLab, and Gitea. The GitHub integration links commits to Zoho Projects issues by including the issue ID in the commit message using the syntax "[#ISSUEID] commit message," with multiple issues referenced by separating IDs with commas. Setup involves copying a Service Hook URL from Zoho Projects' Developer Space and adding it as a webhook in the GitHub repository's settings. Once connected, a linked commit appears on the Changesets tab of the corresponding issue, and all changesets across a project can be reviewed from the Issues section. This capability is available on Premium, Enterprise, and Ultimate plans. Other supported integrations include Slack for pushing project updates into chat channels, Zendesk for converting support tickets into issues or tasks, and Zoho Flow, which extends connectivity to dozens of additional Zoho and third-party applications.

Procedure: Linking GitHub Commits to Zoho Projects Issues

1. In Zoho Projects, open Developer Space and copy the Service Hook URL for the project.
2. In the GitHub repository, go to Settings, then Webhooks, and add the copied URL as a new webhook.

3. In each commit message going forward, reference the relevant issue ID using the syntax "[#ISSUEID] commit message," separating multiple IDs with commas when a commit addresses more than one issue.
4. Verify the link by opening the referenced issue in Zoho Projects and checking its Changesets tab for the new commit.

The Zoho Projects mobile app is available for iPhone, iPad, and Android phones, giving field and remote staff the ability to create and work on projects, and to access and manage assigned work away from a desktop. A Zoho Projects subscription, whether free or paid, along with an Apple ID or Google Play account, is required to install and sign in to the app.

Best Practice

Standardize on the GitHub commit-linking convention across a development team before development begins on a client engagement, since the issue-linking syntax only works retroactively if commits are tagged at the time they are made; unlinked commit history cannot be attached to issues after the fact.

Common Pitfall

Teams sometimes assume every source-code integration behaves identically across GitHub, Bitbucket, GitLab, and Gitea. Setup mechanics and plan availability differ by provider, so each integration should be validated individually against the client's actual plan and repository host rather than assumed from the GitHub configuration alone.

Verification Note

The minimum supported operating system versions published in Zoho's mobile app documentation, iOS 9.0 and Android 4.1, appear substantially out of date relative to current mobile operating systems as of 2026. ClearPath treats this figure as unconfirmed and verifies actual minimum OS support against the current App Store or Google Play listing before advising a client on device compatibility.

Sources

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- [Project Dashboard | Online Help](#)
- [Project Reports | Online Help \(Portal-Level Reports\)](#)
- [Zoho Analytics for Projects](#)
- [Zoho Projects - Integrations](#)
- [Zoho Books - Zoho Projects Integration | Help | Zoho Books](#)
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- [Working with Zoho Projects Integration - CRM](#)
- [Timesheet Reports | Online Help | Zoho Projects](#)
- [Zoho Projects Mobile App | Online Help](#)
- [Github Integration | Online Help | Zoho Projects](#)
- [Other Apps | Zoho Projects Integrations](#)

- [Google Drive | Online Help | Zoho Projects](#)
- [Dropbox integration | Online help | Zoho Projects](#)