

TIMEZONE WIDGET USER GUIDE

OVERVIEW

The timezone widgets help you:

- select the correct timezone for a CRM record
- save the timezone to the record
- view the customer's local time
- compare your local time with the customer's local time
- test a different date and time before scheduling calls, demos, or follow-ups

This guide explains how to use both widgets in simple steps.

WIDGETS INCLUDED

There are 2 widgets in this solution:

1. Timezone Selector
2. Timezone Difference

ZOHO AUTOMATION WORKFLOWS

There are 4 Zoho automation workflows running in this solution.

These workflows run when a record is created or edited.

Users can directly enter location values in the Zoho form, such as **Country**, **State**, and **City**.

The workflows use those values for **Contacts**, **Leads**, **Accounts**, and **Cases**.

For **Contacts**, **Leads**, and **Accounts**:

- the workflow reads Country, State, and City from the form
- it calculates the timezone
- it updates the Timezone field automatically
- if the Timezone field is already filled, the automation workflow does not run
- this means a user-set timezone is not overwritten by automation

For **Cases**:

- the workflow does not calculate timezone from direct Case location fields
- it gets the timezone from the related Contact or Account module Timezone field whenever a record is created or edited.

Any user-set values are not overridden by automation. So the Timezone fields need to be empty while creating or updating the Case.

Case workflow order:

- it checks the Contact in the **Related To** field first
- if **Related To** is empty, it checks the related **Account** timezone
- it then updates the Case timezone through the Zoho automation flow

Step 1

1) Make sure the Timezone field is empty for the automation to work.

2) Alternatively, users can set the Timezone manually if no automation is required.

3) If TimeZone field is prefilled, automation will not overwrite the value, clear the field for the automation to work while editing the record.

Step 2

Fill the below fields

- 1) Country
- 2) State
- 3) City

Step 3

1) Notice the Timezone field is automatically updated through Zoho Workflow

2) If the address need to be updated to a new timezone, clear the timezone field and update the address for the automation to work

Step 4

1) Notice the Timezone difference button.

2) Timezone field need to be filled either through automation or manually for this button to work.

1. TIMEZONE SELECTOR

Purpose

This widget is used to choose and save the correct timezone for a CRM record such as:

- Leads
- Contacts
- Accounts

Note:

- the timezone may already be populated by Zoho automation workflows
- if the Timezone field is already filled, the **automation workflow will not override** it
- **Timezone Selector** can be used to review, correct, or update the timezone when needed

What You See

The widget contains:

- **Country** dropdown
- **State** dropdown
- **City** dropdown

- **Timezone** field
- **Save Timezone** button

How To Use It

Step 1: Open the record

Open the CRM record where you want to set the timezone.

Examples:

- a Lead
- a Contact
- an Account

Step 2: Select the country

Choose the customer's country from the **Country** dropdown.

What happens next:

- if the country has a single timezone, selecting the country is enough
- if the country has multiple timezones, the widget may show **State** and **City** options

Step 3: Select the state

If the country has multiple timezones, choose the correct state, province, or region.

What happens next:

- the widget narrows down the available cities
- the timezone is updated based on the selected state
- for some countries, selecting the state alone is enough
- for others, a state and city combination gives the correct result

Step 4: Select the city

Choose the city if it is available.

What happens next:

- the city refines the timezone further
- the Timezone field in widget populates automatically

Note:

- city selection gives the most accurate result
- if no city is selected, the state timezone is used

Step 5: Review the timezone

Check the **Timezone** field before saving.

Examples:

- **America/New_York**
- **Europe/London**
- **Asia/Kolkata**

Step 6: Save the timezone

Click **Save Timezone**.

What happens next:

- the timezone is saved to the CRM record
- the selected country is saved
- the selected state is saved when available
- the selected city is saved when available
- the form field is updated after the save action completes

Step 7: Refresh the page

Refresh the CRM page after saving.

What happens next:

- the updated timezone becomes visible in the form
- the latest saved value is shown on the record

The screenshot shows the Zoho CRM interface for a lead record. The left sidebar contains navigation links like Home, Reports, Analytics, My Requests, CRM Tools, Leads, Contacts, Accounts, Deals, Tasks, Meetings, and Calls. The main content area is titled 'Leads' and shows the record for 'Christian McMoTh Sample - Account Test'. The 'Overview' tab is active, displaying the 'Timezone Assist' widget. The widget has four dropdown menus: 'Country' (United States), 'State' (Kansas), 'City' (Kansas City), and 'Timezone' (America/Chicago). Below these is a 'Save Timezone' button. Red arrows point from text annotations to each of these fields. The annotations are: 'Select Country, the timezone field will be populated' (pointing to Country), 'For countries with multiple Timezones, state and city will be visible.' (pointing to State), 'Timezone will be populated, based on the selection. Once clicked Save Timezone. The Timezone will be save along with City and State if available.' (pointing to City), and 'Refresh the page to see changes' (pointing to the Save Timezone button). The bottom of the page shows a chat bar with the text 'Here is your Smart Chat (Ctrl+Space)'.

Note For Cases

Timezone Selector is not available in the **Cases** module.

For Cases, timezone is populated through Zoho automation flows instead of manual selection inside the widget. Users can manually set the Timezone field if required.

Resetting Your Selection

If you selected the wrong place:

- choose the correct country again
- then choose the correct state
- then choose the correct city

The timezone will update automatically.

2. TIMEZONE DIFFERENCE

Purpose

This widget helps you compare:

- your local time
- the customer's local time

It is useful for:

- call scheduling
- demo planning
- follow-up timing
- avoiding messages outside business hours

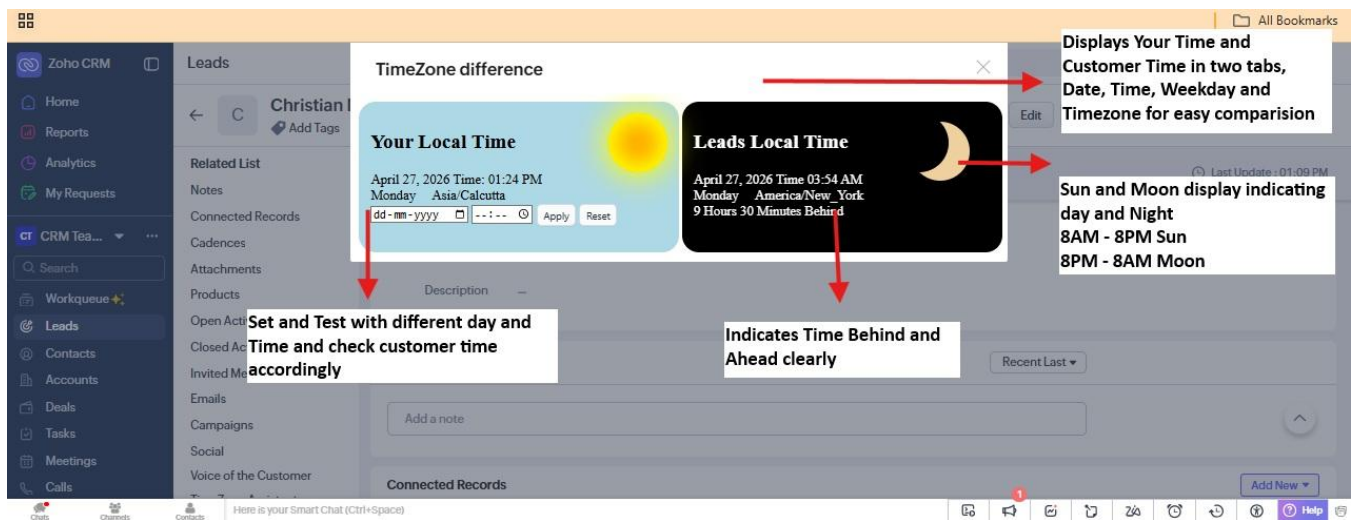
What You See

The widget contains 2 panels:

3. Your Local Time
4. Customer Local Time

It also includes:

- current date and time
- day of the week
- timezone label
- date picker
- time picker
- **Apply** button
- **Reset** button
- time difference display



HOW TO USE TIMEZONE DIFFERENCE

View the current time

When the widget loads:

- the left side shows your current local time
- the right side shows the customer's current local time based on the saved CRM timezone

- for Cases, the widget uses the related Contact timezone first and then the related Account timezone if needed

Check the time difference

The widget also shows whether the customer is:

- ahead of you
- behind you

Example:

- **5 Hours 30 Minutes Ahead**

Test another meeting time

To check a future or custom time:

5. Select a date in the **Date** field
6. Select a time in the **Time** field
7. Click **Apply**

What happens next:

- your local time display changes to the selected date and time
- the customer time display updates for the same moment in their timezone
- the time difference remains visible

Reset back to current time

Click **Reset** to return to the present time.

What happens next:

- your current local date and time is restored
- the customer time updates back to the current time

RECOMMENDED END USER WORKFLOW

Use the widgets in this order:

8. Open the CRM record
9. Check whether the timezone field was already updated by automation
10. If needed, open **Timezone Selector**
11. Choose **Country**
12. If needed, choose **State** or **State** and **City**
13. Click **Save Timezone**
14. Refresh the page
15. Open **Timezone Difference**
16. Review the customer's local time
17. Use **Apply** to test the best time for contact

For a **Case** record:

18. open the Case
19. allow the Zoho automation flow to populate timezone information

20. check whether the **Related To** field is linked to a Contact
21. if no Contact is linked, make sure the related Account has a timezone
22. open **Timezone Difference**
23. review the time shown from the related Contact or Account

FEATURES LIST

Timezone Selector Features

- country-based timezone selection
- state-based timezone filtering
- city-based timezone filtering
- automatic timezone detection from selected location
- works together with Zoho automation workflows
- supports single-timezone countries with country-only selection
- supports multi-timezone countries with state-only or state-and-city selection
- support for countries with multiple timezones
- support for single-timezone countries
- CRM record update support
- saves timezone to Leads
- saves timezone to Contacts
- saves timezone to Accounts
- saves country to the record
- saves state to the record when available
- saves city to the record when available
- validation before saving
- success and error status messages

Timezone Difference Features

- shows your current local time
- shows customer local time
- shows customer timezone
- for Cases, reads timezone from the related Contact first
- for Cases, falls back to the related Account timezone when needed
- shows current day for both contexts
- shows time difference
- supports manual date selection
- supports manual time selection
- allows time simulation with **Apply**
- restores live current time with **Reset**
- visual day and night indication
- 8 PM to 8 AM Moon and 8 AM to 8 PM Sun
- dynamic label based on CRM module

BENEFITS FOR END USERS

- reduces timezone mistakes
- reduces manual timezone entry
- helps schedule calls more confidently
- improves communication timing
- prevents contacting customers too early or too late
- gives a better customer experience
- saves time for sales and support teams

BEST PRACTICES

- check whether automation already populated the timezone before changing it
- if a timezone is already filled and correct, leave it as is because automation will not override it
- always save the timezone before using the comparison widget
- refresh the page after saving timezone in **Timezone Selector**
- select city whenever possible for better accuracy
- use the **Apply** button before scheduling an international meeting
- verify the customer's region if the country has multiple timezones
- use the record's saved timezone as the source of truth

TROUBLESHOOTING

The timezone is not saving

Check the following:

- the record is opened properly in Zoho CRM
- a valid timezone is selected
- the timezone lookup record exists in CRM
- note that **Timezone Selector** does not apply to Cases

The timezone was saved but is not visible in the form

Possible reason:

- the page has not been refreshed yet

Try this:

- refresh the CRM record page after clicking **Save Timezone**

The customer time is not showing

Possible reasons:

- timezone is not saved on the record
- the record does not have context
- the CRM API could not fetch the record
- for Cases, the **Related To** Contact may be empty
- for Cases, the related Account may not have a timezone

State or city is not visible

Possible reasons:

- the selected country has only one timezone
- the current dataset does not require state or city for that country
- the field is waiting for the previous selection

SIMPLE EXAMPLE

Example scenario:

24. Open a Contact record
25. Select **United States**
26. Select **California**
27. Select **San Francisco**
28. Confirm timezone shows **America/Los_Angeles**
29. Click **Save Timezone**
30. Open **Timezone Difference**
31. View the difference between your time and the contact's time

CONCLUSION

These widgets help users store the right timezone and make better decisions when contacting customers across different regions. Using both widgets together improves accuracy, scheduling, and customer communication.