

ZOHO CRM Plus

Smart Software to help you Gain & Retain Customers

Zoho CRM Plus helps you engage with the right prospects, sell smarter and retain more customers, while measuring and improving all customer-facing activities along the way.



Your Benefits

- Create effective email campaigns to reach and interact with your prospects.
- Proactively chat with your website visitors and convert them into prospects.
- Create, schedule and deliver your social media content when your audience is most likely to engage.
- Manage your sales pipeline, spot opportunities, increase win rates and grow your business.
- Deliver unmatched customer service across multiple channels, languages and time zones.
- Plan, track and collaborate on client deliverables using our project management tools.
- From click to deal, it's all in one place. Drill down your Google AdWords campaigns and improve conversion rates.
- Gain data-driven insights on your sales performance with smart dashboards and KPIs.
- Gather opinions, analyze results and discover better ways to exceed customer expectations.

Sales Force Automation

Feature	Availability
Sales Force Automation	
Leads	Yes
Accounts	Yes
Contacts	Yes
Potentials	Yes
Sales Forecasting	Yes
Forecasts Based on Territories	Yes
Macros	Yes

Document Library	Yes
Activities - Tasks, Events, Calls	Yes
Reminders	Yes
Recurring Activities	Yes
Multiple Currencies	Yes
Social (Integration with Facebook and Twitter)	Yes
Social Tab (Facebook Pages and Twitter accounts of the Company)	Yes
Feeds for Team Collaboration	
Status updates and direct messages	Yes
Attach files to feeds	Yes
Follow-up Rules	Yes
Tag Users	Yes
Groups	Yes
Marketing Automation	
Zoho CRM for Google AdWords	Yes
Website Visitor Tracking	Yes
Marketing Campaigns	Yes
Mass Email	1000/day
Custom Email Templates	Unlimited
Email Opt-out	Yes
Auto-responders	3
Schedule Mass Email	Yes
Inventory Management	
Products	Yes
Price Books	Yes
Quotes	Yes

Sales Orders	Yes
Invoices	Yes
Vendors	Yes
Purchase Orders	Yes
Inventory Templates	Yes
Customer Support	
Cases	Yes
Solutions	Yes
Web-to-Case Form	20 forms/module
Notify Owner	Yes
Assignment Rules	20 rules & 50 rule entries
Case Escalation Rules	Yes
Business Hours	Yes
CRM Analytics	
Standard Reports	Yes
Custom Reports	Unlimited
Schedule Reports	20 Schedulers/user Maximum 100 schedulers/day for Org
Standard Dashboards	Yes
Custom Dashboards	Unlimited
Data Administration	
File Storage (for Org.)	1 GB minimum + 1 GB /user license
No. of Records	Unlimited
Import Data	20000
Data Import - Clone option	Yes
Data Import - Skip and Overwrite option	5000 records/batch
Merge Duplicates -Find & Merge Option	Yes

Merge Duplicates - De-duplicate Option	Yes
Import History	Past 60 days
Export Module Data	3000 records/module
Free Data Backup	2 data backups/month
Data Backup	\$10 /request
API for Third-party App. Integration	500 calls/user license Max: 25000 calls/day Min: 4000 calls/day
Security Management	
Profiles	25
Roles	250
Territory Management	250 territories
Groups	50
Field-Level Security	Yes
Custom Links	10 links/module
Default Data Sharing Settings	Yes
Public Read Only(in Default Data Sharing Settings)	Yes
Data Sharing Rules	15 rules
Audit Logs	Yes
Allowed IPs	Yes
Record Level Sharing	Yes
Product Customization	
Organize Tabs	Yes
Rename Tabs	Yes
Group Tabs	10 groups
Custom Modules	10 modules
Custom Buttons	10/module
Page Layout Customization	Yes

Email Address Duplication Check	Yes
Standard List Views	Yes
Custom List Views	Unlimited
Records in List Views	100
Modify Criteria Pattern	Yes
Last Activity Time in Criteria	Yes
Custom Related Lists	3 custom related lists/module
Customize Search Layout	Yes
Customize Related Lists Columns	Yes
Copy Customization	Yes
Web Tabs	10
Custom Fields (Includes all types of fields)	500 fields/module
Maximum limit for individual field types	Yes
String fields (Text, Pick List, Multi-select Pick List, Email, Phone, Text Area, URL, and Auto Number)	200
Text Area fields	10
Integer Fields (digits without decimal)	40
Number fields (Decimal, Percentage, and Currency)	40
Date Fields	50
Date & Time Fields	50
Boolean (Check box)	80
Long Integer Fields	35
Lookup Fields	5
Auto-number Fields	1
(Inclusive of the total no. of Text fields)	
Formula Fields (Included in the total no. of custom fields)	15 fields/module
* Number + Currency = 8	

* String = 2	
* Boolean = 2	
* Date Time = 2	
Special Fields	
Contact Role	Yes
Terms & Conditions	Yes
Tax Rates	Yes
Workflow Management	
Workflow Rules	30 rules/module
Time Based Action	5 actions/workflow rule
Workflow Tasks	5 tasks/action
Reminder for Workflow Tasks	Yes
Workflow Alerts	5 alerts/action
Workflow Approvals	Yes
Record Owner, Record Creator, Record Owners Manager (options in Alert)	Yes
Using Email field from the Module & Related Modules	Yes
Workflow Field Updates	3 field updates/action
Delete (Execute On Record Action)	Yes
Field Update (Execute On Record Action)	Yes
Workflow Convert	Yes
Execute Based on Date Field Value	Yes
Webhooks	1/action. 10000 calls/day or 200 calls per user license for the org (whichever is lower)
Custom Functions	1 Instant Action and 5 Time-Based Actions per Rule

Custom Functions - Calls per Day	10000 calls/day or 200 calls per user license for the org (whichever is lower)
Custom Functions - Integration Tasks	25000 Zoho API calls/day using deluge
Custom Functions - Get Data	25000 calls/day
Custom Functions - Post Data	25000 calls/day
Custom Functions - Send Mail	1000 emails/day
Web Forms	
Forms for Leads/Contacts	20 forms/module
Approve Records	Yes
Assignment Rules	20 rules & 50 rule entries
Auto Response Rules	Yes
Unsubscribe Form	Yes
Notify Record Owner	Yes
Email	
IMAP	Yes
POP	Yes
Zoho Mail Add-on	Yes
BCC dropbox	Yes
Plug-in for Microsoft Outlook	Yes
Attachments in Email	10 MB
Add-ons & Integrations	
Zoho CRM Mobile Edition	Yes
Manage Mail Add-on Users	Yes
Zoho Creator Integration	Yes
Zoho Writer Add-on	Yes
Zoho Invoice/Books Integration	Yes

Zoho PhoneBridge (Telephony)	Yes
Plug-in for Microsoft Office	Yes
Attach from Zoho Docs	Yes
Attach from Google Docs	Yes
Google Calendar Synchronization (For Google Users)	Yes
Google Contacts Synchronization (For Google Users)	Yes
Google Apps Integration	
Zoho CRM Contextual Gadget for Gmail	Yes
Export Events to Google Calendar	Yes
Export to Google Tasks	Yes
Synchronize Google Calendar (For Google Apps Users)	Yes
Synchronize Google Contact (For Google Apps Users)	Yes
Zoho CRM Web Forms for Google Sites	20/module

Email Marketing Campaigns

Feature	Availability
Email Newsletters	
Pre-designed Newsletter Templates	Yes
Template Layouts	Yes
Drag-and-Drop Editor	Yes
Template Library	Yes
Import Email Templates	Yes
Import Template Content from Google Drive	Yes
Mailing List Management	Yes
Contact Management	5000 leads or contacts per user license with unlimited emails*

Create Mailing Lists	Yes
Segmentation of Mailing Lists	Yes
Custom Fields	Yes
Sync Leads & Contacts from Zoho CRM	Yes
Mailing Lists Email Summary	Yes
Custom Sign-up Forms	Yes
Bounce & Unsubscribe Automatic Removal	Yes
Email Marketing	
Schedule Email Campaigns	Yes
Recipient time zone based Delivery	Yes
Merge Tags	Yes
RSS Email Campaigns	Yes
A/B Testing	Yes
Customize Email Header & Footer	Yes
Email Opened & Unopened Recipients	Yes
Social Sharing	Yes
Video Email Marketing	Yes
Recipient Comments	Yes
Email Authentication	Yes
Compare Email Campaigns	Yes
Custom Coupon Email Campaigns	Yes
Ecommerce email campaigns	Yes
Survey Email Campaigns	Yes
Send Test Emails	Yes
Email Campaign Archives	Yes
Email Campaign Reports	Yes
Marketing Automation	

Email Workflows	Yes
Sign-up based Auto-responders	Yes
Email Action based Auto-responders	Yes
Calendar based Auto-responders	Yes
Custom Date Field based Auto-responders	Yes
Closed Group Auto-responders	Yes
Auto-responder based on Segments	Yes
Auto-responder Summary Report	Yes
Auto-responder Message based Reports	Yes
Multiple Content for Auto-responder Emails	Yes
Opt-in Confirmation	
Design & Customize Opt-in Forms	Yes
Add Company Logo to Opt-in Forms	Yes
Customize Confirmation Page	Yes
Send Opt-in Confirmation Emails	Yes
Customize Opt-in Confirmation Emails	Yes
Social Media Marketing	
Share Email Campaigns on Social Media	Yes
Facebook Page Marketing	Yes
Post Campaigns	Yes
Automatic Posting on Facebook, Twitter & LinkedIn	Yes
Campaign Tracking & Reporting	
Recipient Activity Reports	Yes
Bounces & Unsubscribe Rates	Yes
Open Rates	Yes
Click-Through Rates	Yes
Spam Complaints	Yes

Location Based Reports	Yes
Device Specific Reports	Yes
Share Reports	Yes
Social Campaigns Statistics	Yes
Advanced Analytics with Google Analytics	Yes
Forwards (Tell a Friend)	Yes
Developer API	
Campaign Management	Yes
List Management	Yes
Call back URLs	Yes
Integrations	
Integration with Zoho Creator	Yes
In the Google Apps Marketplace	Yes
Ecommerce Email Marketing with Shopify	Yes
Integration with SurveyMonkey	Yes
Integration with Eventbrite	Yes
Mobile Edition	
Zoho Campaigns for Android	Yes
Zoho Campaigns for iPhone	Yes
Note: Email send limit per month for more than 20 user licenses: 10 * Number of leads/contacts.	

Customer Service Management

Feature	Availability
Ticket Management	
E-mail Response Management	Yes

Product based Ticket Tracking	Yes
Task Assignment	Yes
Ticket-level Time Tracking	Yes
Customer Happiness Ratings	Yes
Contacts & Accounts Management	Yes
Customer Support Channels	
Email Address for Tracking Tickets	Yes
Customer Portal	Yes
Web-to-Ticket Form	20
Twitter	Yes
Facebook	Yes
Community Forums	Yes
Telephony integration with Twilio	Multiple phone numbers with IVR
Live Chat	Yes
Knowledge Base/Solutions	
Number of Solution Folders	Yes
Knowledge Base in Web Portal	Yes
Public & Private Solutions	Yes
Solution-to-Article Conversion	Yes
Customer Portal	
No of Portal Users	Unlimited
Custom Widgets	Yes
Themes & Colors	Yes
Advanced Customization	Yes
Re-Branding	
Domain Mapping	Yes
Remote Authentication	Yes

Multi Language Support	Yes
Set your Time Zone	Yes
Multi Department Management	
No of Departments	Unlimited
Helpdesk Automation	
Workflow Rules	20/Department/Module
Time Based Rules	20/Department/Module
Ticket Assignment Rules	15 Rules
Macros	20/Department/Module
Service Level Agreements (SLA)	
No. of SLAs	10/Department
Multi-Level Escalations	Yes
Business Hours & Holiday List	Yes
Contract Management	
Contracts	Yes
Multi Level Escalation	Yes
Helpdesk Customization	
Custom Tabs & Fields	Yes
Custom E-mail Templates	Yes
Ticket Templates	Yes
Reports & Dashboards	
Canned & Custom Reports	Yes
Standard & Custom Dashboards	Yes
Export Reports to CSV, XLS or PDF	Yes
Scheduled Reports	Yes
Helpdesk Security	
Profiles	30

Roles	250
Field-level Access Control	Yes
Data Sharing Rules	Yes
Group your Users	Yes
Add-ons & Integration	
SMS Add-on	Yes
Integration with Google Apps	Yes
Integration with Zoho BugTracker	Yes
Mobile Edition	
iPad, iPhone and Android devices	Yes

Customer Satisfaction Surveys

Feature	Availability
Design	
No. of surveys	Unlimited
Questions per survey	Unlimited questions
Responses	2500 responses
Survey templates	50+ templates
Types of questions	19
Question logic	Yes
Page logic	Yes
End page logic	Yes
Auto filling	Yes
Custom variables	Yes
Question & Answer Piping	Yes
Multilingual surveys	Yes

Email notification on Survey completion	Yes
Review survey	Yes
Upload files to survey	Yes
Export survey in PDF & Print survey	Yes
Share survey	Yes
Add survey responses in Zoho Sheet & Google Docs	Yes
Add records to Zoho CRM	Yes
Branding	
Hide powered by Zoho footer	Yes
Custom redirect after survey completion	Yes
Full theme Customization	Yes
Add your logo	Yes
Collection	
Host Survey on your own domain (Beta)	Yes
Send survey via web link	Yes
Embed in your website or blog	Yes
Send survey via Facebook, Twitter, LinkedIn, Google+	Yes
Send survey through Zoho Campaigns	Yes
Send survey through MailChimp	Yes
QR codes	Yes
SSL support	Yes
Offline survey	Yes
Multiple collector	Yes
View survey respondent's email when they come to your website (SalesIQ Integration)	Yes
Protection against automated responses (CAPTCHA)	Yes

Password protect your survey	Yes
Analytics	
View results in real time	Yes
Download reports & charts	Yes
Customize reports	Unlimited
Create cross-tab reports	Unlimited
Export responses in Excel & PDF	Yes
Create filters	Unlimited
Share reports	Unlimited
Scoring (score/weight your respondents answers)	Yes
Tag Survey	Yes
Move and Copy survey to other Zoho Survey accounts	Yes
Send pre-set values to your CRM report	Yes
Choice Map responses to CRM fields	Yes
Analyze trends	Yes

Visitor Tracking & Sales Intelligence

Feature	Availability
Website visitor tracking	
Number of visitor tracked per month	5000/user
Number of Websites	10
Chat Volume per month	Unlimited
Departments	10
Tracking Rules (Customize your Tracking)	2 triggers/user
Different Roles and Permissions	Yes
Visitor history	Unlimited

Agent optimizers	
Tabbed organization - handle multiple chats	Yes
Advanced visitor information	Yes
In chat file sharing	Yes
Future View	Yes
Canned Messages for quick strikes	Yes
Transfer chats to other agents	Yes
IP block spammers or harassers	Yes
End your session smartly	Yes
Add and view notes to a chat	Yes
Real-time language translation	Yes
Customer Friendly	
Easy to connect	Yes
Chat without leaving their current window	Yes
Offline messaging	Yes
Easily upload files to agents	Yes
Voice their feedback	Yes
Ability to rate their agent	Yes
E-mail themselves a transcript	Yes
Customizable live chat software	
Multiple embed options	Yes
Customize your web embed appearance	Yes
Customize the look and feel of your chat window	Yes
Advanced customization - chat window with CSS	Yes
Brand your Zoho SalesIQ	Yes
Add your agent's photo	Yes
Multiple brands, web domains, products	Yes
Route chats to specific agents or departments	Yes

Department based Email Configuration	Yes
Advanced Features	
Monitor live chats	Yes
Business Hours	Yes
Chat with customers from mobile devices	Yes
Receive desktop notifications	Yes
Dashboard	
Inter-agent chat	Yes
Portal wide message board	Yes
Notification center	Yes
Easy access to integrated search	Yes
Update your status	Yes
Insightful Reports	
Powerful pre-built reports and dashboards	Yes
Daily statistics delivered to your inbox	Yes
Agent Performance Reports	Yes
Mobile Edition	
SalesIQ App for Android	Yes
SalesIQ App for iOS	Yes

Project Management & Collaboration

Feature	Availability
No. of Projects	Unlimited
Storage Space	100GB
Project templates	20
Gantt Chart	Yes

Resource Utilization Chart	Yes
Project Feeds	Yes
Task Management	Yes
Gantt Chart View	Yes
Document Sharing	Yes
Import MS Projects	Yes
Portal Customization	Yes
Calendar and Forums	Yes
Google Apps Integration	Yes
Time Tracking	Yes
Sync Google Tasks	Yes
Sub Tasks	Yes
Recurrence & Reminders	Yes
Business Hours	Yes
Task duration (in hours / days)	Yes
Dropbox Integration	Yes
Skip Weekends & Holidays	Yes
Timesheet Approval	Yes

Advanced CRM Analytics

Feature	Availability
View real-time reports & dashboards	Yes
Analyze & Track Key Sales Metrics (Sales Funnel, Predictions, Win/Loss rate, Sales team performance, etc.)	Yes
Pre-bundled reports & dashboards	100+ reports & dashboards

Customize reports & dashboards	Unlimited
Create cross-tab reports & charts	Unlimited
Create KPI dashboards	Unlimited
Analyze CRM data along with other data sources/applications	Yes
Apply Filters	Yes
Share reports online	Unlimited
Collaboratively create reports with colleagues	Yes
Export & Print reports as Excel & PDF	Yes
Email reports	Unlimited
Embed reports in web sites/applications	Yes
Records/Rows	2 Million rows
Reports & Dashboards	Unlimited
Databases	Unlimited
Query Tables	Unlimited
Scheduled Imports	Unlimited
Scheduled Emails	40
Multiple DB Owners	Yes
Private Links	Yes
SSL	Yes
Logo Re-branding	Yes
Backup	Yes
Mobile App	Yes
Connectors	
Files & Feeds	Yes
Relational Databases	Yes
Cloud Storage	Yes

Zoho CRM	Yes
Zoho Projects	Yes
Zoho BugTracker	Yes
REST API for Integration	Yes

Social – Social Media Marketing

Feature	Availability
No of Brands	5
Social Networks	5
Advanced Reports	Yes
Advanced Publishing and Scheduling (URL shortener, Smart Q)	Yes
Reports Customization	Yes
Sentiment Analysis	Yes
Collaboration	Yes
Monitoring	Up to 10 saved keyword searches
Browser Plug-ins	Yes
Mobile Edition	
Zoho Social for Android	Yes
Zoho Social for iPhone	Yes

CRM Plus Add-Ons

Features	Availability
CRM - 5GB Storage	\$5/month
Campaigns - 5k Subscribers	\$45/month
SalesIQ - 100K Visitors	\$100/month
Reports - 2 Million Rows	\$80/month
Social - 1 Brand	\$10/month
Survey - 100 Responses	\$5/month

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