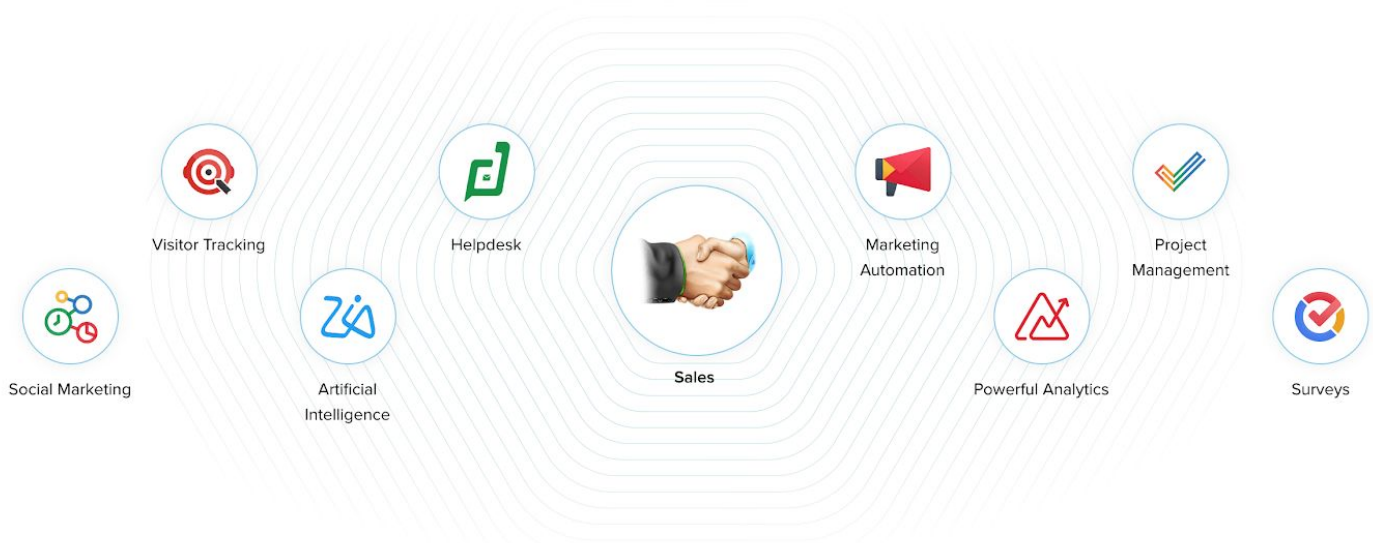**ZOHO** CRM Plus

The Unified Customer Experience Platform.

Zoho CRM Plus empowers your sales, marketing, customer support and every other customer-facing team to work as one. With a completely unified interface, the platform enables businesses to get complete visibility on every customer interaction. The unified interface, unified admin panel, unified setup, unified search, and unified provisioning comes as one of its kind in the industry to help businesses deliver exceptional customer experiences.

Visitor Tracking

Social Marketing

Helpdesk

Artificial Intelligence

Sales

Marketing Automation

Powerful Analytics

Project Management

Surveys

ZOHO CRM Plus

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.

ZOHO CRM Plus

What do I get with CRM Plus?

For a price of $50 /user/month (paid annually), the Zoho CRM Plus platform offers you functionalities for each of your customer-facing teams.

CRM - 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	Yes
Schedule Reports	20 Schedulers/user Maximum 100 schedulers/day for Org
Standard Dashboards	Yes
Custom Dashboards	Yes
Data Administration	
File Storage (for Org.)	1 GB minimum + 1 GB /user license
No. of Records	Unlimited
Import Data	30000
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

ZOHO CRM Plus

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
Product Customization	
Organize Tabs	Yes
Rename Tabs	Yes
Group Tabs	10 groups
Custom Modules	25 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)	300 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)	130
Text Area fields	10
Integer Fields (digits without decimal)	30
Number fields (Decimal, Percentage, and Currency)	20
Date Fields	25
Date & Time Fields	25
Boolean (Check box)	50
Long Integer Fields	15
Lookup Fields	5
Auto-number Fields (Inclusive of the total no. of Text fields)	1
Formula Fields (Included in the total no. of custom fields) * Number + Currency = 8 * String = 2 * Boolean = 2 * Date Time = 2	15 fields/module
Special Fields	Yes
Contact Role	Yes
Terms & Conditions	Yes
Tax Rates	Yes
Workflow Management	
Workflow Rules	50 rules/module; 50 entries/rule
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	5000 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

ZOHO CRM Plus

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

ZOHO CRM Plus

Campaigns - 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*
Topic Management New	Yes
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

ZOHO CRM Plus

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
Callback 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 is unlimited upto 20 user licenses. For more than 20 user licenses: 10 * Number of leads/contacts.	

Desk - 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

ZOHO CRM Plus

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	30/Department/Module
Time Based Rules	30/Department/Module
Ticket Assignment Rules	30 (Direct assignment to agents and teams) 15/Department (Round-robin ticket assignment by Load Balancing)
Macros	30/Department/Module
Blueprint New	Yes
Service Level Agreements (SLA)	

No. of SLAs	20/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
Artificial Intelligence by Zia	
Zia Voice New	Yes
Zia (for Anomaly) New	Yes
Helpdesk Security	
Profiles	50
Roles	250
Light agents	Unlimited
Field-level Access Control	Yes
Data Sharing Rules	Yes
Group your Users	Yes
Add-ons & Integration	
SMS Add-on	Yes

ZOHO CRM Plus

Integration with Google Apps		Yes
Integration with Zoho BugTracker		Yes
ASAP Web Add on	New	Yes
Marketplace to extend in built capabilities	New	Yes
Integration with SalesIQ	New	Yes
Mobile Edition		
iPad, iPhone and Android devices		Yes

Surveys - 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 (70 languages)	Yes
Email notification on Survey completion	Yes
Review survey	Yes

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Smart survey triggers **New**	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

SalesIQ - 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

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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
Zobot New	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

* You can track upto 5k users per user license. A maximum of 200K users can be tracked per month, which can be extended using add-ons.

Projects - Project Management & Collaboration

Feature	Availability
Number of Projects	Unlimited
Storage Space	30GB
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

Analytics - Advanced 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 Plus

CRM		Yes
Projects		Yes
BugTracker		Yes
REST API for Integration		Yes
Facebook	New	Yes
Page Insights	New	Yes
Zia - AI	New	Yes
Geo Maps	New	Yes
Smart Data Alerts	New	Yes

Social – Social Media Marketing

Feature	Availability
No. of Brands	3 (Trial)
	1 (Paid) *Brand add on available
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
Pause/Resume Scheduled Posts	Yes
Facebook Lead Ads	Yes
zShare Browser Extension	Yes

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Publishing Calendar		Yes
Google My Business Integration	New	Yes
Smart Publishing Capabilities		
Queues	New	Yes
Video Uploads	New	Yes
Nifty Browser Plugin	New	Yes
Add ons and Integrations		
Integration with CRM	New	Yes
Integration with Desk	New	Yes
Facebook Lead ads & Lead forms integration	New	Yes
Mobile Edition		
Social for Android		Yes
Social for iPhone		Yes

Motivator – Sales Performance Management

Feature	Availability
Dashboards	
Standard Dashboards	Yes
Custom Dashboards	Yes
Live Dashboard New	Yes
Dashboard Access Control	Yes
Targets/Scoreboards	

Company Targets / Scorecards	Yes
Team Targets / Scorecards	Yes
Individual Targets / Scorecards	Yes
Contests	
Number of Concurrent Contests	Unlimited
Motivator	
Standard TV Channels	Yes
Contest TV Channels	Yes
KPI and Target Leaderboards	Yes
4 x 4 Channel grid view New	Yes
Mobile edition	
Zoho Motivator for Android	Yes
Zoho Motivator for iPhone and iPad New	Yes

CRM Plus Add-Ons

Features	Availability
CRM - 5GB Storage	$5/month
Campaigns - 5k Contacts	$45/month
SalesIQ - 100K Visitors	$100/month
Reports - 2 Million Rows	$80/month
Social - 1 Brand	$20/month

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