Why Zoho CRM?

Zoho CRM is almost 1/5th cost of our competitors and yet has most of the feature set that they claim to have. It is a cloud-based software for managing your customer relationship in a better way. It helps streamline your organization wide sales, marketing, customer support, and inventory management functions in a single system. We are light on your pocket and the features and integrations we give you are unmatched.

Zoho's advantage is based on ease-of-use as well as on our business model. Zoho's monthly pricing model clearly gives customers the flexibility of shorter or longer-term commitments minimizing any risk of vendor lock-in.

- **Rich feature-set with an intuitive web-based user interface.**
- **Affordable CRM solution at a fraction of the cost of alternatives.**
- **Fully customizable user interface to match any organization's CRM process.**
- **Export your data any time.**
- **Increase business productivity by automating key aspects of the customer life-cycle.**
- **Continuous product updates without service disruptions and extra cost.**
- **Sell Smarter with Artificial Intelligence.**
- **Dedicated customer support during implementation & deployment.**

FEATURE COMPARISON

Feature	Salesforce Essential	Zoho Standard	Salesforce Professional	Zoho Professional	Salesforce Enterprise	Zoho Enterprise
Pricing	25$/per month only annual pricing- Upto 5 Users	$12 per user/month billed annually (or) $18 month-to-month	75$ per month / Billed annually	$20 per user/month billed annually (or) $30 month-to-month	150$/user/month annually billed	$35 per user/month billed annually (or) $45 month-to-month
Maximum no.of users	Not specified	No upper limit	Not specified	No upper limit	Not specified	No upper limit
Data storage (leads,contacts, etc.)	20 MB per user	100,000 records	20 MB per user	Unlimited	20 MB per user	Unlimited

File storage (DOC, PDF, etc.)	512 MB per user	1 GB/org + 512 MB/user	512 MB per user	1 GB/org + 512 MB/user	2 GB per user	1 GB/org + 1GB/user
Technical support	$	Yes	$	Yes	$	Yes
Premium Support	N	N	Y(Limited user)	Yes (10 users annual contract, 20% of license fee)	Y (Limited user)	Yes (10 users annual contract, 20% of license fee)
Sales automation						
Leads	Y	Y	Y	Y	Y	Y
Accounts	Y	Y	Y	Y	Y	Y
Contacts	Y	Y	Y	Y	Y	Y
Opportunities	Y	Y	Y	Y	Y	Y
Tasks, log a call,calendar, and notes	Y	Y	Y	Y	Y	Y
Feeds – Team collaboration	Y	Y	Y	Y	Y	Y
CRM views	N	Y	Y-Paid	Y	Y-Paid	Y
BluePrint	N	N	N	N	Y	200 BP/MODULE
SalesSignals	Y	N	Y	N	Y	Y
Advanced filters	Y	Y	Y	Y	Y	Y
Macros	N	N	Y	Y	Y	Y
Scoring Rules	N	10/module	Y (paid)	20/module	Y (paid)	30/module
Sales forecasts	N	Y	Y (No custom field forcast)	Y	Y	Y
GameScope	N	N	Y (paid add on)	Y	Y (paid add on)	Y
BCC dropbox for email	N	N	N	Y	Y (requires Pardot admin role)	Y
Calendar sync via CalDAV	N	Y	N	Y	Y	Y

Lead Assignment Rules	N	N	N	20 rules & 20 rule entries	Y(limits per version of workflow is 50)	20 rules & 50 rule entries
Email Parser	-	N	-	N	-	Y
Social						
User level integration (Fb, Twitter)	N	Y	Y	Y	Y (add on)	Y
Social tab (Fb,Twitter & Google plus)	N	N	N	Y	Y (Marketing cloud)	Y
Social interactions with leads / contacts	N	N	N	Y	Y	Y
Capture Leads from Fb, Twitter	N	N	Y	Y	N	Y
Artificial Intelligence						
Lead and Deal prediction	N	N	N	N	Y (Add on)	Y
Email Sentiment	N	N	N	N	Y(requires SC)	N
Best time to contact	N	N	Y	N	Y	Y
Zia Reminder (based on Best time to contact)	N	N	N	N	Y	Y
Lead Enrichment	N	N	N	N	Y(Einstein Paid)	Y(extension $)
Zia Voice	Y (paid)	N	Y (paid)	N	Y (paid)	10
Marketing Automation						
Web to lead capture	Y	Y	Y	Y	Y	Y
Website visitor tracking	N	$	$	$	Y	$
Campaigns	N	Y	Y	Y	Y	Y

Email insights	N	Y (Note: Includes response tracking & limited options under advanced filters.)	Y	Y	Y	Y
Email templates (HTML/Plain-text)	Y	100	Y	UNLIMITED	Y	UNLIMITED
Mass email	N	250/DAY	Y	500/DAY	Y	1000/DAY
Auto responders	N	N	N	N	Y (with Pardot)	3
Integration with Google AdWords	N	N	N	Y	Y (with Pardot)	Y
Document Management						
Documents Storage (Max storage - 5GB)	Y(1GB Max)	Y	Y(1GB Max)	Y	Y(1GB Max)	Y
Data backup	N	Free - 2 data backups/month For additional backup ($10/request)	N	Free - 2 data backups/month For additional backup ($10/request)	Y	Free - 2 data backups/month ($10/request)
Notes & file attachment	Y	Y	Y	Y	Y	Y
Folders search	Y	Y	Y	Y	Y	Y
Customer support						
Cases	Y	N	Y	Y	Y	Y
Case assignment rules	N	N	2000/Org	20 rules and 20 rule entries	2000/Org	20 rules and 50 rule entries
Case escalation rules	Y	N	Y	N	Y	Y
Solutions (knowledge base)	N	N	Y(Read only)	Y	Y(Read and write is $	Y
Business Hours		N		N		Y

User Portal						5
Portals	N	N	N	N	$	Y (First portal user type creation is free and upto 10k client users can be invited for free Creation of more than one portal user type will include pricing)
Inventory Management						
Inventory Management	N	N	Y	Y	Y	Y
Sales quotes	N	N	Y	Y	Y	Y
Sales orders	N	N	Y	Y	Y	Y
Purchase orders	N	N	Y	Y	Y	Y
Invoices	Y(Billing edition)	N	Y(Billing edition)	Y	Y(Billing edition)	Y
Products	N	N	Y	Y	Y	Y
Price books	N	N	Y	Y	Y	Y
Vendors	N	N	Y	Y	Y	Y
Integrated procurement & fulfillment	Y(through App exchange)	N	Y(through App exchange)	N	Y(through App exchange)	Y
CRM analytics						
Standard reports	N	Y	Y	Y	Y	Y
Custom Reports	N	100	50	UNLIMITED	200	UNLIMITED
Standard dashboards	N	Y	3 per dashboard	Y	3 per dashboard	Y
Customizable dashboards	N	10	N	UNLIMITED	Upto 5	UNLIMITED

Report scheduler	N	20 schedulers/user Maximum 100 schedulers/day for Org.	1/hour	20 schedulers/user Maximum 100 schedulers/day for Org.	1/hour	20 schedulers/user Maximum 100 schedulers/day for Org.
Anomaly Detection (Powered by Zia)	N	N	Y(troubleshoot)	N	Y(troubleshoot)	10 DETECTOR
CRM analytics	N	Y	N	Y	Y(with Einstein)	Y
Product Customization						
Home page customization	N	Y	2	Y	Y	Y
List View Customization	N	N	2	N	Y	Y
Page layouts	N	N	2	N	Y	3/MODULE
Layout Rules (conditional layouts)	N	N	Y	N	Y	10/layout
Validation Rules	N	N	Y	Basic	Y	Advanced
Sub Forms	N	N	N	N	Y(pardot edition)	Y
Translation Bench	N	N	Y	N	Y	Y
Layout editor	Y	Y	Y	Y	Y	Y
Rename tabs	N	Y	Y	Y	Y	Y
Multiple value group pick- lists						
M: N relationship	N	N	Y(3)	N	Y(5)	Y
Copy customization	N	N	Y(app exchange)	Y	Y(app exchange)	Y
Custom fields	Y	10 fields/module	Y	150 fields/module (Note: Activities module has only 140 fields)	Y	302 fields/module (Note: Activities module has only 230 fields)

Custom formula fields	Y(character limit of 3900 char)	N	Y(character limit of 3900 char)	15 fields/module	Y(character limit of 3900 char)	15 fields/module
Custom links	N	N	2	10 links/ module	Y	10 links/module
Custom modules	N	N		N		50
Custom buttons	N	N	2	N	Y	50
Custom related lists	-	N	?	N	-	5/MODULE
Tab groups	-	10	-	10	-	25
Web tabs	N	N	Y	N	Y	25
Reporting Hierarchy		N		N		Y
Security administration						
Profiles	Y	5	Y	15	Y	25
Roles	-	5	-	10	-	250
Field-level security	N	N	Y(Admin only)	Y	Y(Admin only)	Y
Group – level Security	Y	Y	Y	Y	Y	Y
Data Sharing Rules	N	N	N	N	Y(Share extension)	15
Record level sharing	N	N	Y	N	Y	Y
Territory Management	N	N	N	N	Y	150
Data Security by Encryption (EAR)	N	N	N	N	Y(add on)	5
REPORTS						
Standard reports	N	Y	Y	Y	Y	Y
Custom Reports	N	100	50	UNLIMITED	200	UNLIMITED

Report scheduler	N	20 schedulers/user Maximum 100 schedulers/day for Org.	1/hour	20 schedulers/user Maximum 100 schedulers/day for Org.	1/hour	20 schedulers/user Maximum 100 schedulers/day for Org.
Analytics						
Chart	N	Y	Y	Y	Y	Y
KPI	N	Y	N	Y	Y	Y
Funnel	N	Y	Y	Y	Y	Y
Target	N	N	N	N	Y	Y
Comparator	-	N	-	N	-	Y
Anomaly Detection (Powered by Zia)	N	N	N	N	Y	Y
Standard dashboards	N	Y	3 per dashboard	Y	3 per dashboard	Y
Customizable dashboards	N	10	N	UNLIMITED	Upto 5	UNLIMITED
Workflow Management						
Workflow rules	N	6 rules/module 5 conditions/rule	N	20 rules/module 5 conditions/rule	2000 objects - 500 rules per object - 50 active rules/object	50 rules/module 10 conditions/rule
Workflow alerts	N	5/action	N	5/action	10/rule	(No. of Users *200) or 10,000
Workflow tasks	N	5 tasks/action	N	5 tasks/action	10	5 tasks/action
Workflow field updates	N	N	N	3 field updates/ action	10	3 field updates/ action
Workflow approval	N	N	N	N	Y	10
Workflow Insights	N	N	N	N	Y	Y
Workflow Multiple Condition	N	5 conditions/rule	N	5 conditions/rule	Y	10 conditions/rule

Webhooks	N	N	N	1/action 10000 calls/day or 100 calls/user license (whichever is lower)	Y	1/action 20000 calls/day or 500 calls per user license for the org. (whichever is lower)
Schedules	N	N	N	N	Y	Y
Time-based actions	N	5/RULE	N	5/RULE	Y(40)	5/RULE
Custom function via Deluge script	N	N	N	N	Y	1 Instant Action and 5 Scheduled Actions per Rule
Workflow Multiple Condition	N	5 conditions/rule	N	5 conditions/rule	Y	10 conditions/rule
Mobile						
iOS	Y	Y	Y	Y	Y	Y
Android	Y	Y	Y	Y	Y	Y
Mobile SDK	Y(open source)	N	Y(open source)	N	Y(open source)	Y
Globalization						
Multi-currency	-	N	-	Y	-	Y
Multi-language support	Y(partner)	Y	Y(partner)	Y	Y(partner)	Y
Time zone	N	Y	Y	Y	Y	Y
Number, date, and calendar formats	Y	Y	Y	Y	Y	Y
Add-ons & Integrations						
Plug-in for Microsoft Outlook	Y	N	Y	Y	Y	Y
Plug-in for Microsoft Office	N	N	N	Y	Y	Y
Office 365 Integration	N	Y	Y	Y	Y	Y

Email integration (POP/IMAP)	Y(with App Ex)	N	Y(with App Ex)	Y	Y(with App Ex)	Y
Gmail integration	Y	Y	Y	Y	Y	Y
Google apps integration	Y	Y	Y	Y	Y	Y
Slack Integration	N	Y	Y	Y	Y	Y
CTI– Hosted PBX systems	N	Y	Y	Y	Y	Y
CTI– On-Premise PBX systems	N	Y	Y	Y	Y	Y
Developers						
Web services api	N	Max: 5000 calls/day Min: 2000 calls/day	N	Max: 10000 calls/day Min: 3000 calls/day	1000 calls/day - Max 15,000/day	Max: 25000 calls/day Min: 4000 calls/day
Third-party Applications Integration	N	Y	Y(listed in App exchange)	Y	Y(listed in App exchange)	Y
Catalyst						
Widgets	-	N	-	N	-	Y
Connections	-	N	-	N	-	Y

Integration with Zoho Apps:

1. Scale your big business, with **Zoho suite of business application** (Zoho Creator, Zoho Invoice, Zoho Calendar, Zoho Reports, Zoho Recruit, Zoho Support, Zoho Books and Zoho Subscriptions)in house, and it's very easy for you to integrate with the CRM and deploy from there.

2. Zoho Creator is equipped to provide solutions to meet your end-to-end business requirements. Starting from simple data collection forms to complex ERP level applications have been built using Zoho Creator. **For your requirement, you can easily built proposal management solutions using Zoho Creator** as the User interface is a lot simpler and straightforward when compared to PowerApps(MS Dynamics CRM); even for non-programmers to come up with a working business application in minutes.

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Zoho CRM vs Salesforce CRM