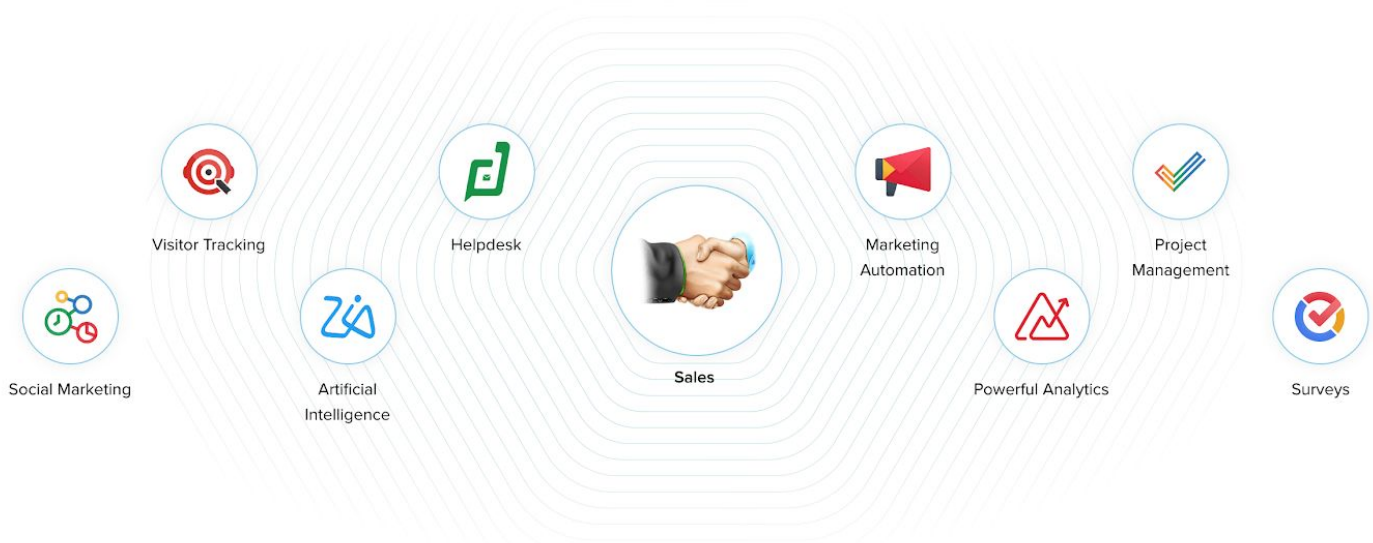




# The Unified Customer Experience Platform.

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.



## 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.

## 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
<b>Sales Force Automation</b>	
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
<b>Feeds for Team Collaboration</b>	
Status updates and direct messages	Yes
Attach files to feeds	Yes
Follow-up Rules	Yes

Tag Users	Yes
Groups	Yes
<b>Marketing Automation</b>	
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
<b>Inventory Management</b>	
Products	Yes
Price Books	Yes
Quotes	Yes
Sales Orders	Yes
Invoices	Yes
Vendors	Yes
Purchase Orders	Yes
Inventory Templates	Yes
<b>Customer Support</b>	
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
<b>CRM Analytics</b>	
Standard Reports	Yes
Custom Reports	Yes
Schedule Reports	20 Schedulers/user Maximum 100 schedulers/day for Org
Standard Dashboards	Yes
Custom Dashboards	Yes
<b>Data Administration</b>	
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
<b>Security Management</b>	
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
<b>Product Customization</b>	
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
<b>Workflow Management</b>	
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
<b>Web Forms</b>	
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



<b>Email</b>	
IMAP	Yes
POP	Yes
Zoho Mail Add-on	Yes
BCC dropbox	Yes
Plug-in for Microsoft Outlook	Yes
Attachments in Email	10 MB
<b>Add-ons &amp; Integrations</b>	
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
<b>Google Apps Integration</b>	
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

## Campaigns - Email Marketing Campaigns

Feature	Availability
<b>Email Newsletters</b>	
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 <span style="color: red;">New</span>	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
<b>Email Marketing</b>	
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
<b>Marketing Automation</b>	
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
<b>Opt-in Confirmation</b>	
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
<b>Social Media Marketing</b>	
Share Email Campaigns on Social Media	Yes
Facebook Page Marketing	Yes
Post Campaigns	Yes
Automatic Posting on Facebook, Twitter & LinkedIn	Yes
<b>Campaign Tracking &amp; Reporting</b>	
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
<b>Developer API</b>	
Campaign Management	Yes
List Management	Yes
Callback URLs	Yes
<b>Integrations</b>	
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
<b>Mobile Edition</b>	
Zoho Campaigns for Android	Yes
Zoho Campaigns for iPhone	Yes
<b>Note:</b> 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
<b>Ticket Management</b>	
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
<b>Customer Support Channels</b>	
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
<b>Knowledge Base/Solutions</b>	
Number of Solution Folders	Yes
Knowledge Base in Web Portal	Yes
Public & Private Solutions	Yes
Solution-to-Article Conversion	Yes
<b>Customer Portal</b>	
No of Portal Users	Unlimited
Custom Widgets	Yes
Themes & Colors	Yes
Advanced Customization	Yes
<b>Re-Branding</b>	
Domain Mapping	Yes
Remote Authentication	Yes
Multi Language Support	Yes
Set your Time Zone	Yes
<b>Multi Department Management</b>	
No of Departments	Unlimited
<b>Helpdesk Automation</b>	
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
<b>Service Level Agreements (SLA)</b>	

No. of SLAs		20/Department
Multi-Level Escalations		Yes
Business Hours & Holiday List		Yes
<b>Contract Management</b>		
Contracts		Yes
Multi Level Escalation		Yes
<b>Helpdesk Customization</b>		
Custom Tabs & Fields		Yes
Custom E-mail Templates		Yes
Ticket Templates		Yes
<b>Reports &amp; Dashboards</b>		
Canned & Custom Reports		Yes
Standard & Custom Dashboards		Yes
Export Reports to CSV, XLS or PDF		Yes
Scheduled Reports		Yes
<b>Artificial Intelligence by Zia</b>		
Zia Voice	New	Yes
Zia (for Anomaly)	New	Yes
<b>Helpdesk Security</b>		
Profiles		50
Roles		250
Light agents		Unlimited
Field-level Access Control		Yes
Data Sharing Rules		Yes
Group your Users		Yes
<b>Add-ons &amp; Integration</b>		
SMS Add-on		Yes

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
<b>Mobile Edition</b>		
iPad, iPhone and Android devices		Yes

## Surveys - Customer Satisfaction Surveys

Feature	Availability
<b>Design</b>	
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



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
<b>Branding</b>		
Hide powered by Zoho footer		Yes
Custom redirect after survey completion		Yes
Full theme Customization		Yes
Add your logo		Yes
<b>Collection</b>		
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

<b>Analytics</b>	
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

<b>Feature</b>	<b>Availability</b>
<b>Website visitor tracking</b>	
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

<b>Agent optimizers</b>	
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
<b>Customer Friendly</b>	
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
<b>Customizable live chat software</b>	
Multiple embed options	Yes
Customize your web embed appearance	Yes
Customize the look and feel of your chat window	Yes
Zobot <span style="color: red; font-weight: bold;">New</span>	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
<b>Advanced Features</b>	
Monitor live chats	Yes
Business Hours	Yes
Chat with customers from mobile devices	Yes
Receive desktop notifications	Yes
<b>Dashboard</b>	
Inter-agent chat	Yes
Portal wide message board	Yes
Notification center	Yes
Easy access to integrated search	Yes
Update your status	Yes
<b>Insightful Reports</b>	
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	5 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
<b>Connectors</b>	
Files & Feeds	Yes
Relational Databases	Yes
Cloud Storage	Yes

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

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

## Motivator – Sales Performance Management

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



Company Targets / Scorecards	Yes
Team Targets / Scorecards	Yes
Individual Targets / Scorecards	Yes
<b>Contests</b>	
Number of Concurrent Contests	Unlimited
<b>Motivator</b>	
Standard TV Channels	Yes
Contest TV Channels	Yes
KPI and Target Leaderboards	Yes
4 x 4 Channel grid view <span style="color: red;">New</span>	Yes
<b>Mobile edition</b>	
Zoho Motivator for Android	Yes
Zoho Motivator for iPhone and iPad <span style="color: red;">New</span>	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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