# ZOHO CRM

# Why Choose Zoho CRM over Salesforce

Zoho CRM offers you all the necessary features that are very user friendly and would need an expert to set it all up. It provides various customizations to choose from and to automate your business workflow without having to pay a huge price and have back and forth emails to setup them up. It caters to businesses big and small and is continuing to scale up everyday.

# Zoho CRM vs Salesforce CRM

## Edition Comparison

| FEATURE | Zoho CRM Standard | Salesforce Standard | Zoho CRM Professional | Salesforce Professional | Zoho CRM Enterprise | Salesforce Enterprise | Zoho CRM Ultimate | Salesforce Ultimate |
|---|---|---|---|---|---|---|---|---|
| Pricing | $12 per user/month billed annually $18 month-to-month | $25/per month only annual pricing- Up to 5 Users | $20 per user/month billed annually $30 month-to-month | 75$ per month / Billed annually | $35 per user/month billed annually $45 month-to-month | 150$/user/month annually billed | $100 Per user/month billed annually | 300$/user/month annually billed |
| Maximum no.of users | No upper limit | - | No upper limit | - | No upper limit | - | No upper limit | - |
| Data storage (leads, contacts, etc.) | 100,000 records | 20 MB per user | Unlimited | 20 MB per user | Unlimited | 20 MB per user | Unlimited | 120 MB per user |
| File storage (DOC, PDF, etc.) | 1 GB/org + 512 MB/user | 512 MB per user | 1 GB/org + 512 MB/user | 512 MB per user | 1 GB/org + 1GB/user | 2 GB per user | 10GB/org + 1GB/user | 2 GB per user |
| Technical support | ✓ | $ | ✓ | $ | ✓ | $ | ✓ | Free up to 5 users |
| Premium Support | - | - | Yes ( 10 users annual contract, 20% of license fee ) | Yes ( Limited user) | Yes ( 10 users annual contract, 20% of license fee ) | Yes (Limited user) | ✓ | ✓ |

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|---|---|---|---|---|---|---|---|---|
| **Sales force automation** | | | | | | | | |
| Leads | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Accounts | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Contacts | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Opportunities | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Tasks, log a call,calendar, and notes | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Feeds – Team collaboration | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| CRM views | ✓ | - | ✓ | $ | ✓ | $ | ✓ | $ |
| BluePrint / Process Builder | - | - | - | - | 200 bp/module | ✓ | 200 bp/module | ✓ |
| SalesSignals | - | ✓ | - | ✓ | ✓ | ✓ | ✓ | ✓ |
| Advanced filters | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Macros | - | - | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Scoring Rules | 10/module | - | 20/module | $ | 30/module | $ | 30/module | $ |
| Sales forecasts | ✓ | - | ✓ | - | ✓ | ✓ | ✓ | ✓ |
| GameScope | - | - | ✓ | $ | ✓ | $ | ✓ | $ |

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|---|---|---|---|---|---|---|---|---|
| BCC dropbox for email | - | - | ✓ | - | ✓ | $ | ✓ | $ |
| Calendar sync via CalDAV | ✓ | - | ✓ | - | ✓ | ✓ | ✓ | ✓ |
| Lead Assignment Rules | - | - | 20 rules & 20 rule entries | - | 20 rules & 50 rule entries | 50 rules overall | ✓ | 50 rules overall |
| Email Parser | - | - | - | - | ✓ | - | ✓ | - |
| **Social** | | | | | | | | |
| User level integration (Fb, Twitter) | ✓ | - | ✓ | ✓ | ✓ | $ | ✓ | $ |
| Social tab (Fb,Twitter & Google plus) | - | - | ✓ | - | ✓ | $ | ✓ | $ |
| Social interactions with leads / contacts | - | - | ✓ | - | ✓ | ✓ | ✓ | ✓ |
| Capture Leads from Fb, Twitter | - | - | ✓ | ✓ | ✓ | - | ✓ | - |
| **Artificial Intelligence** | | | | | | | | |
| Lead and Deal prediction | - | - | - | - | ✓ | - | ✓ | - |
| Email Sentiment | - | - | - | - | - | - | ✓ | - |
| Best time to contact | - | - | - | ✓ | ✓ | ✓ | ✓ | ✓ |
| Zia Reminder ( based on best time to contact) | - | - | - | - | ✓ | ✓ | ✓ | ✓ |

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| Lead Enrichment | - | - | - | - | $ | $ | ✓ | $ |
| Zia Voice | - | $ | - | $ | 10 | $ | Unlimited | $ |
| Automation suggestions and anomalies | - | - | - | - | ✓ | - | ✓ | - |
| **Marketing Automation** | | | | | | | | |
| Web to lead capture | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Website visitor tracking | $ | - | $ | $ | $ | ✓ | $ | ✓ |
| Campaigns | ✓ | - | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Email insights | ✓ | - | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Email templates (HTML/Plain-text) | 100 | ✓ | Unlimited | ✓ | Unlimited | ✓ | Unlimited | ✓ |
| Mass email | 250/Day | - | 500/Day | ✓ | 1000/Day | ✓ | 1000/Day | ✓ |
| Auto responders | - | - | - | - | 3 | $ | 3 | 3 |
| Integration with Google AdWords | - | - | ✓ | - | ✓ | $ | ✓ | 3 |
| **Document Management** | | | | | | | | |
| Documents  Storage ( Max storage - 5GB) | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |

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| Data backup | 2 data backups/month ($10/request) | - | 2 data backups/month ($10/request) | - | 2 data backups/month ($10/request) | ✓ | 4/month (i.e weekly free backup) | ✓ |
| Notes & file attachment | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Folders search | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| **Customer support** | | | | | | | | |
| Cases | - | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Case assignment rules | - | - | 20 rules and 20 rule entries/user | 2000/Org | 20 rules and 50 rule entries/user | 2000/Org | 50 rules and 100 rule entries/user | 2000/Org |
| Case escalation rules | - | ✓ | - | ✓ | ✓ | ✓ | ✓ | ✓ |
| Solutions (knowledge base) | - | - | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Business Hours | - | - | - | - | ✓ | - | ✓ | - |
| **User Portal** | | | | | | | | |
| Portals | - | - | - | - | Yes up to 10K client users | $ | Yes up to 10K client users | $ |
| **Inventory Management** | | | | | | | | |
| Inventory Management | - | - | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Sales quotes | - | - | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |

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|---|---|---|---|---|---|---|---|---|
| Sales orders | - | - | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Purchase orders | - | - | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Invoices | - | $ | ✓ | $ | ✓ | $ | ✓ | $ |
| Products | - | - | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Price books | - | - | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Vendors | - | - | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Integrated procurement & fulfillment | - | $ | - | $ | ✓ | $ | ✓ | $ |
| **CRM analytics** | | | | | | | | |
| Standard reports | ✓ | - | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Custom Reports | 100 | - | Unlimited | 50 | Unlimited | 200 | Unlimited | 2000 |
| Standard dashboards | ✓ | - | ✓ | 3 views | ✓ | 3 views | ✓ | 3 views |
| Customizable dashboards | 10 | - | Unlimited | - | Unlimited | Up to 5 | Unlimited | Up to 10 |
| Report scheduler | 20 schedulers/ user Maximum 100 schedulers/day for Org. | - | 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. | 2/hour |

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| Anomaly Detection ( Powered by Zia ) | - | - | - | - | 10 Trends | - | ✓ | - |
| CRM analytics | ✓ | - | ✓ | - | ✓ | $ | ✓ | $ |
| **Product Customization** | | | | | | | | |
| Home page customization | ✓ | - | ✓ | 2/Org | ✓ | ✓ | ✓ | ✓ |
| List View Customization | - | - | - | 2/Org | ✓ | ✓ | ✓ | ✓ |
| Page layouts | - | - | - | 2/Org | 3/Module | ✓ | 25/Module | ✓ |
| Layout Rules ( conditional layouts) | - | - | - | ✓ | 10/layout | ✓ | 10/layout | ✓ |
| Validation Rules | - | - | 5 rules/layout | ✓ | 10 rules/layout | ✓ | 10 rules/layout | ✓ |
| Sub Forms | - | - | - | - | ✓ | $ | ✓ | $ |
| Translation Bench | - | - | - | ✓ | ✓ | ✓ | ✓ | ✓ |
| Layout editor | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Rename tabs | ✓ | - | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Multi select lookup | - | - | - | ✓ | 2/module | ✓ | 2/module | ✓ |
| Copy customization | - | - | ✓ | $ | ✓ | $ | ✓ | $ |

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|---|---|---|---|---|---|---|---|---|
| Custom fields | 10 fields/module | ✓ | 150 fields/module (Note: Activities module has only 140 fields) | ✓ | 302 fields/module (Note: Activities module has only 230 fields) | ✓ | 500 fields/module | ✓ |
| Custom formula fields | - | ✓ | 15 fields/module | ✓ | 15 fields/module | ✓ | 15 fields/module | ✓ |
| Custom links | - | - | 10 links/ module | 2 | 10 links/ module | ✓ | 50 links/ module | ✓ |
| Custom modules | - | - | - | - | 50 | - | 100 | - |
| Custom buttons | - | - | - | 2 | 50 | ✓ | | ✓ |
| Custom related lists | - | - | - | - | 5/Module | $ | 10/Module | $ |
| Tab groups | 10 | - | 10 | - | 25 | - | 50 | - |
| Web tabs | - | - | - | ✓ | 25 | ✓ | 50 | ✓ |
| Reporting Hierarchy | - | - | - | - | ✓ | ✓ | ✓ | ✓ |
| **Security administration** | | | | | | | | |
| Profiles | 5 | ✓ | 15 | ✓ | 25 | ✓ | 50 | ✓ |
| Roles | 5 | - | 10 | - | 250 | ✓ | 500 | ✓ |
| Field-level security | - | - | ✓ | $ | ✓ | $ | ✓ | $ |

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|---|---|---|---|---|---|---|---|---|
| Data Sharing Rules | - | - | - | - | 15 | ✓ | 50 | ✓ |
| Group-level security | - | - | - | - | - | - | - | - |
| Record level sharing | - | - | - | ✓ | ✓ | ✓ | ✓ | ✓ |
| Territory Management | - | - | - | - | 150 | ✓ | 250 | ✓ |
| Data Security by Encryption ( EAR) | - | - | - | - | 5 | ✓ | 10 | ✓ |
| **Reports** | | | | | | | | |
| Standard reports | ✓ | - | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Custom Reports | 100 | - | Unlimited | 50 | Unlimited | 200 | Unlimited | 2000 |
| Report scheduler | 20 schedulers/user Maximum 100 schedulers/day for Org. | - | 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. | 2/hour |
| **Analytics** | | | | | | | | |
| Chart | ✓ | - | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| KPI | ✓ | - | ✓ | - | ✓ | ✓ | ✓ | ✓ |
| Funnel | - | - | - | - | ✓ | ✓ | ✓ | ✓ |

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|---|---|---|---|---|---|---|---|---|
| Target | - | - | - | - | ✓ | ✓ | ✓ | ✓ |
| Comparator | - | - | - | - | ✓ | - | ✓ | - |
| Anomaly Detection ( Powered by Zia ) | - | - | - | - | ✓ | ✓ | ✓ | ✓ |
| Standard dashboards | ✓ | - | ✓ | 3 views | ✓ | 3 views | ✓ | 3 views |
| Customizable dashboards | 10 dashboard | - | Unlimited | - | Unlimited | Up to 5 | Unlimited | Up to 10 |
| **Workflow Management** | | | | | | | | |
| Workflow rules | 6 conditions/ module | - | 20 conditions/ module | - | 50 conditions/ module 50 entries/ module | 2000 objects - 500 rules per object - 50 active rules/ object | 50 conditions/ module 50 entries/ module | 2000 objects - 500 rules per object - 50 active rules/ object |
| Workflow alerts (No. of Users * 100) or 5000 Emails per day depending on the lower limit.) | 5 emails/action | - | 5 emails/action | - | 5 emails/action | 10/rule | 5 emails/action | 10/rule |
| Workflow tasks | 5 tasks/action | - | 5 tasks/action | - | 5 tasks/action | 10 | 5 tasks/action | 10 |
| Workflow field updates | - | - | 3 field updates/ action | - | 3 field updates/ action | 10 | 3 field updates/ action | 10 |
| Workflow approval | - | - | - | - | 10 | ✓ | 50 | ✓ |
| Workflow Insights | - | - | - | - | ✓ | ✓ | ✓ | ✓ |

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|---|---|---|---|---|---|---|---|---|
| Workflow Multiple Condition | 5 conditions/rule | - | 5 conditions/rule | - | 10 conditions/rule | ✓ | 10 conditions/rule | ✓ |
| Webhooks | - | - | 1/action 10000 calls/day or 100 calls/user license (whichever is lower) | - | 1/action 20000 calls/day or 500 calls per user license for the org. (whichever is lower) | ✓ | 50,000 calls/day or 1000 calls/user license | ✓ |
| Schedules | - | - | - | - | 5/ workflow rule | ✓ | 5/ workflow rule | ✓ |
| Time-based actions | 5/rule | - | 5/rule | - | 5/rule | ✓ | 5/rule | ✓ |
| Custom function via Deluge script | - | - | - | - | 1 Instant Action and 5 Scheduled Actions per Rule | ✓ | 1 Instant Action and 5 Scheduled Actions per Rule | ✓ |
| Workflow Multiple Condition | 5 conditions/rule | - | 5 conditions/rule | - | 10 conditions/rule | ✓ | 10 conditions/rule | ✓ |
| **Mobile** | | | | | | | | |
| iOS | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Android | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Mobile SDK | - | ✓ | - | ✓ | ✓ | ✓ | ✓ | ✓ |
| **Globalization** | | | | | | | | |

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|---|---|---|---|---|---|---|---|---|
| Multi-currency | - | - | ✓ | - | ✓ | ✓ | ✓ | ✓ |
| Multi-language support | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Time zone | ✓ | - | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Number, date, and calendar formats | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| **Add-ons & Integrations** | | | | | | | | |
| Plug-in for Microsoft Outlook | - | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Plug-in for Microsoft Office | - | - | ✓ | - | ✓ | ✓ | ✓ | ✓ |
| Office 365 Integration | ✓ | - | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Email integration (POP/IMAP) | - | $ | ✓ | $ | ✓ | $ | ✓ | $ |
| Gmail integration | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Google apps integration | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Slack Integration | ✓ | - | ✓ | - | ✓ | - | ✓ | - |
| CTI– Hosted PBX systems | ✓ | - | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| CTI– On-Premise PBX systems | ✓ | - | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |

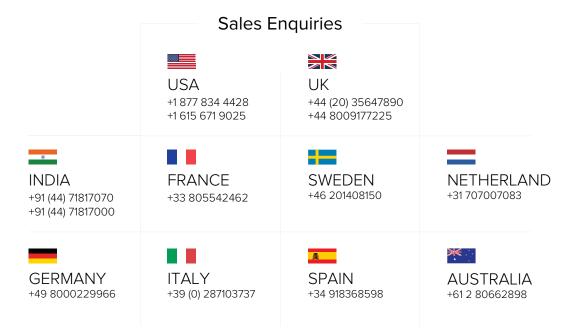| FEATURE | Zoho CRM Standard | Salesforce Standard | Zoho CRM Professional | Salesforce Professional | Zoho CRM Enterprise | Salesforce Enterprise | Zoho CRM Ultimate | Salesforce Ultimate |
|---|---|---|---|---|---|---|---|---|
| **Developers** | | | | | | | | |
| Web services api | 250 calls/user license Max: 100000 calls/ day/org. Min: 10000 calls/day/org. | - | 500 calls/user license Max: 100000 calls/ day/org. Min: 10000 calls/day/org. | - | 1000 calls/user license Max: 100000 calls/ day/org. Min: 10000 calls/day/org. | 1000 calls/day - Max 15,000/day | 1000 calls/user license Max: 200000 calls/ day/org. Min: 10000 calls/day/org. | 5000 calls /day Max 15,000 |
| Third-party Applications Integration | ✓ | - | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| **Catalyst** | | | | | | | | |
| Widgets | - | - | - | - | ✓ | - | ✓ | - |
| Connections | - | - | - | - | ✓ | - | ✓ | - |

$   Indicates that the feature is available as a paid add-on.

-   Indicates the feature isn't available in this version.

✓   Indicates the feature is available in this paid plan.

## Sales Enquiries

| | |
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"After switching from Salesforce to Zoho CRM, Benchmark's efficiency increases exponentially and the wow factor includes transition process which took just 72 hours."

**Daniel Miller,**
Marketing Director, Benchmark

# Ready to try Zoho CRM for your team?

## GET STARTED

**ZOHO CRM**

Sales@zohocorp.com  |  www.zoho.com/crm

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