



## City of North Port

### Interoffice Memorandum

**To:** Purchasing

**From:** Mel Thomas, Economic Development Manager

**Date:** August 15, 2019

**RE:** CRM Due Diligence and Mid-Priced Vendor Justification

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Successful economic development relies heavily on tracking the relationships we have with our business partners, our community partners, and the local businesses who make up the economic environment of our city. To this end, it is imperative that a customer relationship management (CRM) product include not only sales-related functions, but also the ability to track multi-dimensional relationships between us, our partners, and local businesses.

A thorough evaluation was made of three separate CRM providers to determine which would be best able to provide a meaningful way to track our relationships and therefore our success as a department. IT participated in all six demos (two demos per provider) and gave their input as we evaluated the systems.

The providers we evaluated are:

Octo UX/Hubspot –	Tom Wengler	(423) 309-7483	tomw@octoux.com
Insightly –	John Hendershott	(925) 586-2905	johnh@insight.ly
Zoho –	Henry Johnson	(646) 817 9527	henry@zohocorp.com

The following criteria were used to evaluate which provider was best able to meet the needs of our department:

- Availability of:
  - dashboards
  - reports
  - email campaigns
  - project management
- Ability to customize data and reports
- Integration with Microsoft Outlook and social media sites (Facebook, Linked In, Twitter)
- Mobile capabilities

- Web forms
- Availability and cost of ongoing support plans
- Price per User

The CRM provider we chose is **Insightly**. The reason we chose them is because of the ease of data entry, the uncluttered look of the pages, and the dashboards and reports that are included in the base price. Also, the base price of the subscription was lower than the other CRM we were considering.

Of the three CRMs we evaluated, the over-all lowest priced CRM was Zoho CRM Plus. We eliminated Zoho from consideration after their second demo for several reasons. The initial demo for Zoho was delayed by over a half-an-hour because the online meeting product they wanted us to view the demo through had technical issues. This online meeting product was developed by Zoho. In the second demo, we had similar issues, however Zoho provided a back-up meeting option (Uber-Meeting) much more quickly. In addition, in both demos, the demonstrators spoke quickly and were difficult to follow. We were concerned that the quality of the demonstration was a foreshadowing of the quality of technical support we could expect. The Zoho CRM itself was much more cumbersome to use and had a cluttered look compared to the other two CRMs we evaluated. For these reasons, we eliminated Zoho from consideration.

We appreciate your attention to this. I am happy to provide additional details should any be required.

*Mel*



Frank Miles, Neighborhood Development Services Director





# CITY OF NORTH PORT PROCUREMENT REQUEST FORM QUOTES



Please indicate:  Visa Purchase  Purchase Order

Single Purchase (For current FY)  Blanket Purchase (Ongoing purchases for current FY)  Change Order  Amendment

DEPARTMENT/DIVISION **Economic Development** NAME OF REQUESTOR **Mel Thomas**

**A. Please describe all products and/or services to be procured:**

- Cloud-based Customer Relationship Management System for three full-time users and one part-time user
- Set-up and customization of software as appropriate for economic development use
  - Import existing contacts from Outlook
  - Ongoing IT help-desk support
  - Ability to scan business cards
  - Ability to create customized, reportable data fields
  - Email campaigns
  - Customizable views and dashboards
  - Data import, export, and reporting

**B. Vendor Information**

Vendor Name: **Insightly, Inc.**

Vendor Number: **New**

Address: **680 Folsom Street, Ste. 550, San Francisco, CA 94105**

Contact: **John Hendershott** Phone: **415-630-6270** Email: **johnh@insight.ly**

**C. Please attach the following with request:**

- Quote comparison spreadsheet
- Written quote request sent to vendors (not applicable to online pricing)
- Documented quote pricing from vendors

**Vendor Tracking:**

Check if Vendor Documents Current

YTD Dept Exp. (Inclusive): \$ \_\_\_\_\_

**To be completed by Purchasing:**

YTD City Wide Exp. (Inclusive): \$ \_\_\_\_\_



	OctoUX/Hubspot	Inightly Professional	Zoho CRM Plus
Upfront Costs (support/setup)	\$ 4,900	\$ 3,000	
Subscription/month	\$ 384	\$ 196	\$ 200
# Users	3.5	4	4
Total FIRST FISCAL YEAR Cost	\$ 9,508	\$ 5,352	\$ 2,400
Total subsequent annual cost	\$ 4,608	\$ 2,352	\$ 2,400

# Insightly Pricing Plans

Plus	Professional	Enterprise
<p><b>\$29</b></p> <p>USD per user/month <i>(billed annually)</i></p> <p>\$35/user/month <i>(billed monthly)</i></p> <p>Keep in touch and never drop the ball. Get all the right tools to optimize your message.</p> <ul style="list-style-type: none"><li>• Scheduled emails</li><li>• 100 custom email templates</li><li>• Higher record limits</li><li>• MailChimp auto-import</li></ul> <p>Now you're talking!</p> <p><b>TRY FOR FREE</b></p>	<p><b>BEST VALUE</b></p> <p><b>\$49</b></p> <p>USD per user/month <i>(billed annually)</i></p> <p>\$59/user/month <i>(billed monthly)</i></p> <p>Leap forward in productivity and security. Protect your data and automate processes.</p> <ul style="list-style-type: none"><li>• Role-based permissions</li><li>• Workflow automation</li><li>• Lead assignment roles</li><li>• Priority email support</li></ul> <p>Productivity at the professional level.</p> <p><b>TRY FOR FREE</b></p>	<p><b>\$99</b></p> <p>USD per user/month <i>(billed annually)</i></p> <p>\$129/user/month <i>(billed monthly)</i></p> <p>Contact us and ask how Insightly can give you the best deal for the features and limits you need.</p> <ul style="list-style-type: none"><li>• Unlimited records</li><li>• Unlimited storage</li><li>• Dedicated specialist</li></ul> <p>We can help you grow your business to new heights.</p> <p><b>CONTACT SALES</b></p>

To speak with a human being, call: **1-888-999-4039**

● ALL FEATURES    \$ ADDITIONAL COST

	Plus	Professional	Enterprise
<b>Find and manage leads</b>			
<b>Lead management</b> Manage and track leads and qualify prospects	●	●	●
<b>Lead assignment and routing</b> Automatically route incoming leads to the right reps based on your criteria	—	●	●
<b>Automatic duplicate detection</b> Improve data quality by ensuring leads are not duplicated	●	●	●
<b>Mass emailing</b> Send custom, templated, and tracked emails to targeted lists of leads or customers	●	●	●
<b>Email templates</b> Improve productivity with templated emails and track open and reply rates	●	●	●
<b>Schedule outbound emails</b> Send emails to prospects and customers at exactly the right time, automatically	—	●	●
<b>Visualize leads with kanban</b> Drag and drop leads to move deals along visually in kanban view	●	●	●
<b>Web to lead capture</b> Capture new leads on any web page and filter out spam automatically so you never lose a hot prospect	●	●	●
<b>Automatic social profile enrichment</b> Social network profiles are automatically appended to records so you have the full picture of every contact and lead	●	●	●
<b>Build stronger customer relationships</b>			
<b>Contact and organization management</b> View a complete picture of every contact and organization including history, communications, activities, and linked items	●	●	●
<b>Task and event management</b> Sync calendar events and track assigned tasks so nothing falls through the cracks	●	●	●
<b>Relationship linking</b> Map and better understand complex customer relationships through flexible record linking	●	●	●
<b>Intelligent scoring of relationship strength</b> AI algorithms measure and score the health of every customer relationship so you can maintain engaged contacts	—	—	COMING SOON
<b>Visually map contact relationships</b> Explore the map of relationships between contacts and employees, and discover new paths to prospects	—	—	COMING SOON

● ALL FEATURES    \$ ADDITIONAL COST

	Plus	Professional	Enterprise
<b>Build stronger relationships</b> <i>continued</i>			
<b>Discover undocumented relationships</b> Uncover hidden relationships between contacts and employees, and determine the strength score of those relationships	—	—	COMING SOON
<b>Attach files from cloud storage</b> Attach and link files from any Dropbox, OneDrive, Google Drive, and Box account	●	●	●
<b>Sell more productively</b>			
<b>Opportunity management</b> Manage and track all the details of every deal with stages, pipelines, and custom fields	●	●	●
<b>Customizable sales processes</b> Customize multiple sales pipelines for each sales process, and assign activity templates to each stage	●	●	●
<b>Integrated phone dialer and call logging</b> Place and receive phone calls with click to call, and log and record every call automatically	—	\$	\$
<b>Automatic call analysis and reporting</b> Track phone call frequency and length, and filter and report on call logs	—	\$	\$
<b>Apply task and event activity sets</b> Assign a templated sequence of tasks and events to leads, opportunities, projects, or organizations	●	●	●
<b>Assign sales teams</b> View which sales team members worked on every deal	●	●	●
<b>Batch update records with ease</b> Filter, select, and update the details of any number of records in Insightly from any list view	●	●	●
<b>Work from any device</b>			
<b>Native Android and iOS mobile apps</b> Utilize the power of Insightly from anywhere with our award-winning mobile applications	●	●	●
<b>Real-time mobile data synchronization</b> The Insightly mobile apps are always up to date and in sync	●	●	●
<b>Mobile business card scanning</b> Take photos of business cards from your phone and automatically convert them to contacts or leads	15	25	50
<b>Mobile contact and calendar integration</b> Automatically sync with the contacts and calendar apps on your phone	●	●	●
<b>Mobile voice notes</b> Record audio notes into Insightly from the microphone on your phone	●	●	●

● ALL FEATURES    \$ ADDITIONAL COST

	Plus	Professional	Enterprise
<b>Deliver projects</b>			
<b>Integrated project management</b> Track projects, milestones, and all correspondence and project activities in Insightly	●	●	●
<b>Milestones and associated task tracking</b> Track milestones and schedule and assign associated tasks	●	●	●
<b>Calendar synchronization</b> Sync tasks and events to your work calendar	●	●	●
<b>Configurable project processes</b> Build templates of tasks and event sets, and apply them to projects in one click	●	●	●
<b>Convert won opportunities to projects</b> Move all the way from leads into opportunities and then to projects in Insightly, and preserve all data at every step	●	●	●
<b>Business intelligence platform</b>			
<b>Built-in business intelligence dashboards</b> Build beautiful dashboards with over 40 different chart types and drag-and-drop configurable layouts	●	●	●
<b>Customizable real-time insight cards</b> Create sophisticated charts and graphs, and share them with co-workers on any dashboard	—	100	UNLIMITED
<b>Build and share customized BI dashboards</b> Share complete dashboards or individual charts and graphs with co-workers	—	●	●
<b>Configurable reports</b> Flexible reports with groupings, totals, summaries, and drag-and-drop field selection	●	●	●
<b>Customized report scheduling and emailing</b> Schedule reports to run at any time and have the results emailed to the right people, automatically	●	●	●
<b>Collaborate across the company</b>			
<b>Integration with Google G-Suite Login, Calendar, and Docs</b> The most popular CRM to integrate with the full suite of Google G-Suite productivity tools	●	●	●
<b>Integration with Microsoft Office 365 Login, Calendar, and OneDrive</b> Utilize Insightly from Outlook on your phone or computer, link to OneDrive files, and login to insightly with your Office credentials	●	●	●
<b>Slack integration with AI bot</b> Add the Insightly Slack AI bot and get CRM data within Slack	●	●	●

● ALL FEATURES    \$ ADDITIONAL COST

	Plus	Professional	Enterprise
<b>Collaborate across the company</b> <i>continued</i>			
<b>Insightly Outlook add-on</b> Get the power of Insightly and all your customer and sales data right inside Outlook	●	●	●
<b>Insightly Gmail add-on</b> Use our complete CRM integration inside Google Gmail with our add-on	●	●	●
<b>Model and automate business processes</b>			
<b>Complete workflow automation</b> Automate and orchestrate workflow tasks, sending emails, updating records, executing custom code, firing webhooks, and much more	—	●	●
<b>Custom object creation</b> Store any type of data inside Insightly and relate it to contacts, organizations, sales, or projects with granular permissions	—	●	●
<b>Products, Price Books, and Quotes</b> Select products, pricing, and deliver quotes from within Insightly CRM to accelerate sales processes, drive efficiency, and improve your customer's experience	—	—	●
<b>Custom validation rules</b> Author validation checks to suit your business and it's processes	—	—	●
<b>Calculated fields on any object</b> Powerful formula engine can execute and store complex calculations in any object	—	—	●
<b>Roles and permissions</b> Set granular roles and permissions for objects and data access for different users	2	UNLIMITED	UNLIMITED
<b>Configurable profiles and page layouts</b> Control read/write permissions for fields in any object for different users	2	UNLIMITED	UNLIMITED
<b>Deploy custom apps on any platform</b> Build sophisticated custom apps and deploy them across web and mobile in minutes	—	—	●
<b>Lambda function authoring and execution</b> Create and execute custom code within Insightly in any one of five languages when records are created or updated	—	—	●
<b>Configurable webhooks</b> Send HTTP notifications to any endpoint when records are added or changed	—	●	●
<b>Dynamic page layout rules</b> Tailor business processes, field visibility, and required fields on the fly from user input	—	—	●

● ALL FEATURES    \$ ADDITIONAL COST

	Plus	Professional	Enterprise
<b>Connect to any application</b>			
Over 250 integrations to business apps <small>Insightly integrates with a large range of business applications right out of the box</small>	●	●	●
Published web services API <small>Access our comprehensive REST API at no additional cost</small>	●	●	●
Configurable outbound webhooks <small>Send HTTP notifications to any endpoint when records are added or changed</small>	—	●	●
Schedule serverless lambda functions <small>Create and execute custom code within Insightly in any one of five languages when records are created or updated</small>	—	—	●
Calendar sync <small>Sync events with Google or Microsoft Office calendars</small>	●	●	●
Contact sync <small>Sync contact details with Google Contacts</small>	●	●	●
Gmail integration <small>Access Insightly information and save records from within Gmail</small>	●	●	●
Outlook integration <small>Access Insightly information and save records right from within Outlook</small>	●	●	●
Cloud file storage integration <small>Attach and link files from any Dropbox, OneDrive, Google Drive, and Box account</small>	●	●	●
<b>Get the most out of Insightly</b>			
Standard support plan <small>Access email-based support, Insightly's comprehensive Help Center, and Community Forums</small>	●	●	●
Customized success plan <small>Not sure what help you'll need? Call us and we'll configure a success plan just for you.</small>	—	\$	\$
Professional services <small>Not sure how CRM can help you reach your business goals? We have professional experts to help you. Call us for a tailored proposal: 1-888-999-4039</small>	—	\$	\$
Developer API support <small>Connect Insightly to any app or system with the help of our Developer support plans</small>	—	\$	\$

● ALL FEATURES    \$ ADDITIONAL COST

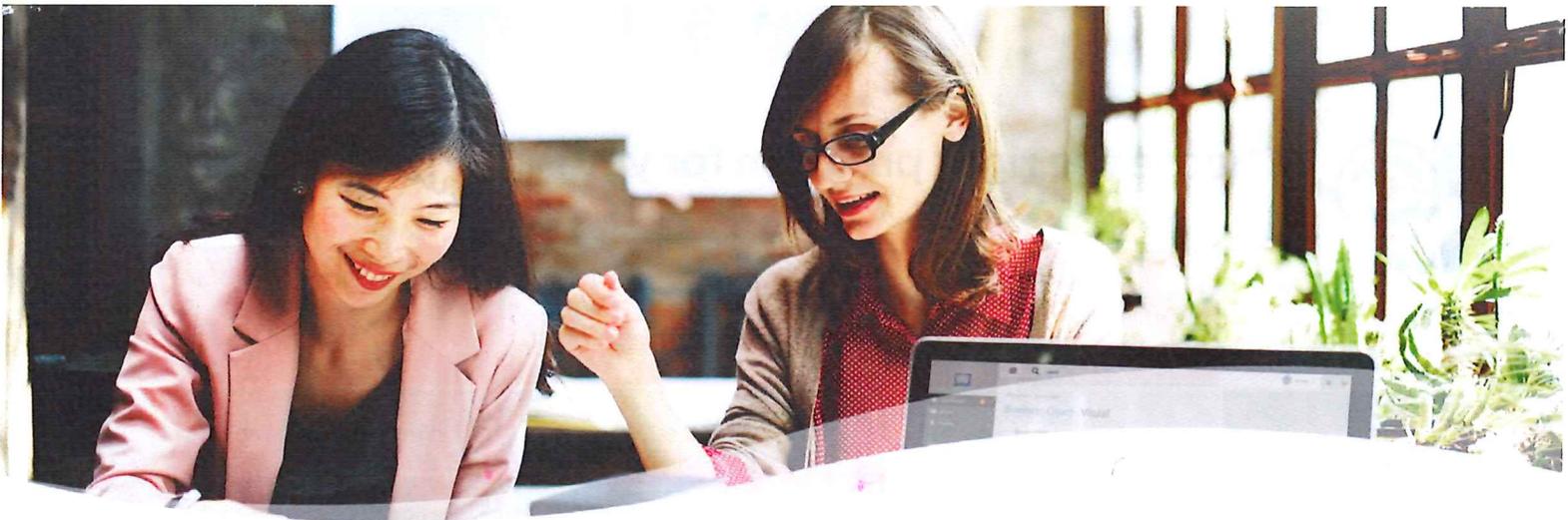
	Plus	Professional	Enterprise
<b>Core CRM</b>			
Record limit	100,000	250,000	UNLIMITED
File storage	10GB	100GB	UNLIMITED
Records per import	25,000	50,000	50,000
Mass email (emails per day)	2,500	5,000	10,000



## Choose the right program for you

*Per our IT's recommendation 1st year startup*

	<b>Premium</b> \$1500 <i>Total per year</i>	<b>Ultimate</b> 15% or min \$3000 <i>Total per year</i>	<b>Admin</b> Starts at \$10K <i>Total per year</i>
Adoption	10 Training sessions	30 Training sessions	Unlimited training sessions
Dedicated Success Resources	Designated <b>Customer Success Manager</b> focused on your business and driving adoption	Designated <b>Sr. Customer Success Manager</b> focused on your business and driving adoption  Proactive account reviews (4)  Dashboard workshop  Customer Experience Mapping	Designated <b>Sr. Customer Success Manager</b> focused on your business and driving adoption  Proactive account reviews (4)  Dashboard workshop  Customer Experience Mapping  Work with your Insightly Admin team to configure your initial account setup and perform your Insightly Admin needs
Support	<b>Email</b> (response time <4 hours)  <b>Phone</b>	<b>Email</b> (response time <1 hour)  <b>Priority phone</b> (w/ Sr. Support Tech)	<b>Email</b> (response time <1 hour)  <b>Priority phone</b> (w/ Sr. Support Tech)
VIP Access		Customer Advisory Board  Priority access to new features	Customer Advisory Board  Priority access to new features
Hands-On Keyboard Admin Work			Insightly's Admin team will take care of your daily CRM administrative needs and make sure your CRM processes are up to date.
Account Configuration			Insightly will work closely with you to understand your specific business needs and will configure your account to support your business's goals and objectives.
Additional Support & Resources	24/7 access to Insightly's Help Center which includes help articles, tutorials, live/recorded webinars and community forums.		



## Our Success Programs

Customer Success is our top priority at Insightly. Our Success Programs provide guidance, phone support and training to help you get the most out of Insightly CRM. No matter what you want to achieve, there's a Success Program that's perfect for you.

Success Programs connect you with our team of product experts to ensure Insightly CRM helps you achieve your business goals. All customers have access to email-based support, Insightly's comprehensive Help Center and community forums. For additional support and Customer Success resources, we offer the following Success Programs to fit your business needs.

### Premium

Designed to help you get started quickly and ensure long-term adoption.

- Direct access to an Insightly expert
- Quick response time for support questions
- Expert guidance on system configuration
- Personalized training

### Ultimate

Work directly with a Senior expert to adopt and deploy faster, and achieve your business goals.

- Top priority support
- Customized training
- Proactive account reviews
- Customer Advisory Board membership

### Admin

Full service program with dedicated Insightly expert to administer your account.

- Account configuration
- Build workflows and business processes
- Creation and delivery of custom reports
- Monitor data integrity

\*For full details, contact [sales@insightly.com](mailto:sales@insightly.com)



## FAQ

**Q: How do I know which Success Program is best for my business?**

Based on your company's CRM knowledge, employee size and goals for Insightly, we will work with you to recommend the best Success Program for your business.

**Q: How will my Sessions be spent?**

Each session is one hour via screen share video conference. A Customer Success Manager will work to help customize your account and train your team. Customer Success Managers work with account admins to provide guidance on customizing your account, setting up processes and organizing workflows.

If you are on the Insightly Admin program you may also have sessions with your designated Tier II Customer Care Representative.

**Q: What's the difference between support and a session?**

Support is available between 7:00AM-4:00PM PST Monday to Friday\*. Phone support with our Customer Care team is reserved for questions or technical difficulties. For example, issues logging in or instructions on how to add or remove a user, the Customer Care team can provide quick answers. Sessions are great for strategic questions on best practices, system setup and processes. In those cases, Customer Success Managers are better suited to help through a pre-scheduled session.

*\*Hours are subject to change*

**Q: What are the benefits of having a "Designated Customer Success Manager?"**

A designated Customer Success Manager will develop an in-depth understanding of your business and provide personalized guidance on industry best practices within Insightly. Your designated Customer Success Manager will provide private training sessions to you and your team that can be recorded for future reference. Each Insightly Customer Success Manager is a CRM expert who is there to ensure your company is getting the most out of Insightly whether you are new to CRM or a CRM power user looking to take your business to the next level.

**Q: What is a proactive account review?**

The Proactive Account Review is a key part of the Ultimate Program. Your dedicated Sr. Customer Success Manager will conduct a full review of your account to ensure Insightly's full capabilities are utilized. An synopsis and recommendations will be provided to ensure Insightly is performing at peak levels.

**Q: What is the Customer Advisory Board?**

Insightly's Customer Advisory Board is a representative group of customers that meets periodically to offer feedback on the product to help inform later releases. Each account can choose one person to serve on the Customer Advisory Board.



## FAQ (cont.)

**Q: What happens when the Success Program ends or all sessions are used?**

You have the option of purchasing another year of success and support through a Success Program and/or Professional Services. Any unused sessions do not roll over into the next year but you can purchase individual sessions a la carte. Please contact your Customer Success Manager if your sessions have been used.

**Q: What are the daily administrative processes my Admin team will cover?**

Your Insightly Admin team will help you with all your general admin needs. This can include, but is not limited to, adding and removing users, creating reports, and setting up your preferred customizations such as custom fields, automated workflows, pipelines and activity sets. As your business grows and your processes change, your Insightly Admin team can help to ensure that your CRM reflects your most current workflows, both internal and client facing.

**Q: Who is my primary point of contact at Insightly if I chose the Insightly Admin Success Program?**

Your primary point of contact for anything requiring technical support or Admin work is your Insightly Admin. For guidance on industry best practices and how to use Insightly to meet your business goals, your designated Sr. Customer Success Manager is here to help.

**Q: WHAT DOES A DASHBOARD WORKSHOP ENTAIL?**

A Senior Customer Success Manager will work with you to discover your business needs and then recommend the proper dashboard set-up to meet those needs. Followed by CSM led side by side training on how to build the strategic dashboard for your teams. The output of these workshops will be a customized dashboard to help you make informed business decisions.

**Q: WHAT IS A CUSTOMER EXPERIENCE MAPPING WORKSHOP?**

Your Senior Customer Success Manager will work with you to map out your business's ideal customer experience. We will recommend a strategy for how to deliver on your ideal customer experience using Insightly and assist your team to successfully bring your customer experience to life.



## HubSpot - City of North Port, Florida

HubSpot's technology is able to contribute to your city's economic development efforts. This proposal outlines how your city can leverage this technology by working with our firm, OctoU.X.

OctoU.X. is a certified partner with HubSpot ([www.hubspot.com](http://www.hubspot.com)) and specializes in working with economic development and membership based organizations. We built the Economic Development Accelerator which is an advanced code set that enhances HubSpot for EDO's.

- HubSpot's Software is purchased directly from HubSpot.
- Services for setup, configuration, training and EDO Accelerator are purchased through OctoU.X.
- 3 options are provided. Simply initial the option selected and also initial the last page.
- The EDO license count is based on the number of CRM licenses.
- We will include the LVGEA deal / project stages in our accelerator for you as well.



## HubSpot Starter Growth Suite - 2 full users, 1 light. \_\_\_\_ (initial)

**Software - 25% discount on all software below.**

License	Quantity	List Price per / mo	Total / month with Discount	Notes
Sales Starter	2	List \$50 per person	\$76.00	
Free Sales CRM	No limit	\$	\$0	
Service Starter	1	List \$50 per person	\$37.50	
Service Free	No limit		\$0	
1 Marketing Starter Includes 1,000 contacts	Org license	\$50 per org	\$37.50	
Additional Contacts		\$15 / k	Variable	Per 1,000 contacts
Reports (Full Reporting engine)	Org license	\$200	\$150	
<b>OctoUX EDO Accelerator</b>	3	\$20 per person	\$45	1 Required for every CRM license
<b>TOTAL</b>			<b>\$346 per month</b>	

### Implementation

- **Sales Hub CRM Starter & Service Hub** (tickets). Setup, configuration, training, \$3,250
- **Marketing Hub Starter** - setup, configuration and training \$2,000
- **Training and Setup for Advanced Reporting** - \$500

**Total Year 1 with North Port Discount based on payment in full at project start... \$5,300.00**



## HubSpot Starter Growth Suite - 3 full users, \_\_\_ (initial)

**Software - 25% discount on all software below.**

License	Quantity	List Price per / mo	Total / month	Notes
Sales Starter	3	List \$50 per person	\$114.00	
Free Sales CRM	No limit	\$	\$0	
Service Starter	1	List \$50 per person	\$37.50	
Service Free	No limit		\$0	
1 Marketing Starter Includes 1,000 contacts	Org license	\$50 per org	\$37.50	
Additional Contacts		\$15 / k	Variable	Per 1,000 contacts
Reports (Full Reporting engine)	Org license	\$200	\$150	
<b>OctoUX EDO Accelerator</b>	3	\$20 per person	\$45	1 Required for every CRM license
<b>TOTAL</b>			<b>\$384 per month</b>	

### Implementation

- **Sales Hub CRM Starter & Service Hub** (tickets). Setup, configuration, training, \$3,250
- **Marketing Hub Starter** - setup, configuration and training \$2,000
- **Training and Setup for Advanced Reporting** - \$500

**Total Year 1 with North Port Discount based on payment in full at project start... \$5,300.00**



## SEQUENCE OF EVENTS

- Proposals Signed - you will receive 2 separate proposals, 1 from OctoUX and 1 from HubSpot.
- Export data your data (Companies, Contacts, Deals / Projects). We will then import this data. We will provide the excel template file and your data must be exported to match this format. You may need to clean / scrub the data. We import each record type 1 time. We will review the data with you before the import into HubSpot.
- **Before training...**
  - We will work with key people on your team via System Design Sessions. This process determines the system configuration and setup. In short, we further customize HubSpot for you before we conduct training sessions.
- An initial **team kickoff meeting** is scheduled.
  - This is a 30 minute meeting held in a group setting. We provide an overview of how the system will function for everyone.
- **Conduct Online Training Schedule**
  - Attendees will access the online training via zoom or another meeting service.
  - 2 options for training (these are working sessions)
    - Attendees can always join meetings remotely / or from their office. In this case, it's always best if employees have 2 monitors (1 to see the instructor's screen, and 1 screen to perform actions in HubSpot during training)
    - Or, if you are in a classroom type setting where everyone is in a conference or training room - please have 1 main display (projector, or large monitor that everyone can see) and everyone will need to bring their computer / cell phones.
- Quarterly Check In Meetings Scheduled.
- Annual Check In Meeting.



**MORE INFO** - Please read carefully and initial below.

**Licensing Info:** Compare licensing editions. Not all options available are listed herein; we have listed the recommended subscriptions.

- [Growth Suite Starter Edition](#)  
<https://www.hubspot.com/pricing/growth-suite?selectedPackage=starter&addons=reports>
- [Reporting Add-On](#)
- [Service Hub Starter](#)
- [Sales Hub Starter](#)
- [Marketing Hub Starter](#)

For more detailed information on product packaging and the limits that apply, please see our Product and Services Catalog [here](#). Price shown in USD and subject to applicable tax.

**IT requirements:**

- [Supported Browsers](#)
- [Email requirements](#)
- [https://knowledge.hubspot.com/articles/kcs\\_article/email-notifications/what-are-the-technical-requirements-for-connecting-my-inbox-to-hubspot-with-imap](https://knowledge.hubspot.com/articles/kcs_article/email-notifications/what-are-the-technical-requirements-for-connecting-my-inbox-to-hubspot-with-imap)
- [Email features by email provider](#)
- [Calling feature requirements](#)
- [HubSpot Security](#)
- [Legal and Compare License Editions](#)

\_\_\_\_ (Initial) have read and understand the info provided above.

Please return to [TomW@OctoUX.com](mailto:TomW@OctoUX.com)



## Compare Zoho CRM editions.

	Standard	Professional	Most Popular Enterprise
<b>Pricing (plus tax, as applicable)</b>			
Billed Annually	\$12/user/month	\$20/user/month	\$35/user/month
Billed monthly	\$18/user	\$30/user	\$45/user
<b>Support</b>			
Basic	✓	✓	✓
Classic	✓	✓	✓
Premium	Paid	Paid	Paid
Enterprise (24 x 7 dedicated support.)	Paid (minimum 25 users)	Paid (minimum 25 users)	Paid (minimum 25 users)
<b>Sales Force Automation</b>			
Leads	✓	✓	✓
Contacts	✓	✓	✓
Accounts	✓	✓	✓
Deals	✓	✓	✓
Tasks, events, call log, and notes	✓	✓	✓
CRM views	✓	✓	✓
Sales forecasting	✓	✓	✓
BCC dropdown for email	✓	✓	✓
Email insights	✓	✓	✓
Macros	-	✓	✓
Multiple currencies	-	-	✓
Contextual custom related lists	-	-	✓
SalesSignals	-	✓	✓

	Standard	Professional	Most Popular Enterprise
Advanced filters	✓	✓	✓
Scoring rules	10 rules/module	20 rules/module	30 rules/module
Reminders	✓	✓	✓
Email Association with Deals	-	✓	✓
Email parser	-	-	✓
<b>Team Collaboration</b>			
Gamescope	-	✓	✓
Calendar	✓	✓	✓
Calendar sync through CalDAV	✓	✓	✓
Calendar Booking	✓	✓	✓
Status updates	✓	✓	✓
Direct messages	✓	✓	✓
Attach files to feeds	✓	✓	✓
Follow-up rules	✓	✓	✓
Groups for team collaboration	✓	✓	✓
Tagging	5 tags/record 20 tags/module	10 tags/record 60 tags/module	10 tags/record 100 tags/module
<b>Social</b>			
Enrich data with Twitter profile	✓	✓	✓
Enrich data with Facebook Profile	✓	✓	✓
Enrich data with Google+	✓	✓	✓
Social tab	1 Brand	1 Brand	2 Brands
Automated Lead Generation from social media	✓	✓	✓
Social interaction with leads/contacts	✓	✓	✓
Social Lite (An exclusive edition of Zoho Social comes bundled with Zoho CRM.)	✓	✓	✓
<b>Marketing Automation</b>			
Email templates	100	Unlimited	Unlimited

	Standard	Professional	Most Popular Enterprise
Email opt-out	✓	✓	✓
Website visitor tracking (Track up to 5k website visitors for free with Zoho SalesIQ. Track any number of visitors with Zoho SalesIQ's paid plans.)	✓	✓	✓
Mass email	250 emails/day	500 emails/day	1000 emails/day
Marketing campaigns	✓	✓	✓
Auto-responders	-	-	3 autoresponders
Zoho CRM for Google Ads	-	✓	✓
<b>Artificial Intelligence (Zia)</b>			
Lead Conversion Prediction	-	-	✓
Deal Closure Prediction	-	-	✓
Data Enrichment	-	-	Paid
Zia Voice (Supported in English only.)	-	-	✓
Zia Reminder	-	-	✓
Best time to contact	-	-	✓
Macro suggestion	-	-	✓
Zia Intelligence for Automation	-	-	✓
<b>Customer Support</b>			
Cases	-	✓	✓
Solutions	-	✓	✓
Web-to-case form	-	10 forms/module	20 forms/module
Business hours	✓	✓	✓
<b>User Portal</b>			
Portals (First portal user type creation is free and upto 5k client users can be invited for free. Creation of more than one portal user type will include pricing.)	-	-	✓
<b>Inventory Management</b>			

	Standard	Professional	Most Popular Enterprise
Price books	-	✓	✓
Sales quotes	-	✓	✓
Sales orders	-	✓	✓
Invoices	-	✓	✓
Vendors	-	✓	✓
Purchase orders	-	✓	✓
<b>Document Library</b>			
Folder sharing	✓	✓	✓
Attach documents	✓	✓	✓
File versioning	✓	✓	✓
Reviews	✓	✓	✓
<b>Reports</b>			
Standard reports	✓	✓	✓
Custom reports	100	Unlimited	Unlimited
Schedule reports	20 schedulers/user Maximum 100 schedulers/day.	20 schedulers/user Maximum 100 schedulers/day.	20 schedulers/user Maximum 100 schedulers/day.
<b>Analytics</b>			
Charts	✓	✓	✓
KPI	✓	✓	✓
Funnels	-	-	✓
Target Meter	-	-	✓
Comparator	-	-	✓
Anomaly Detectors (Powered by Zia)	-	-	10 trends
Standard dashboards	✓	✓	✓
Custom dashboards	10 Dashboards	Unlimited	Unlimited
<b>Web Forms</b>			

	Standard	Professional	Most Popular Enterprise
Web-to-contact form	5 forms/module	10 forms/module	20 forms/module
Web-to-case form	-	✓	✓
Notify owner	✓	✓	✓
<b>File Storage</b>			
Free storage/org	1 GB	1 GB	1 GB
Free storage/user license	512 MB	512 MB	1 GB
Additional storage	₹240/month/5 GB	₹240/month/5 GB	₹240/month/5 GB
<b>Data Administration</b>			
Data storage (all modules)	100,000	Unlimited	Unlimited
Import data (per batch)	10,000	20,000	30,000
Export module data	✓	✓	✓
Data backup	2 backups/month	2 backups/month	2 backups/month
Additional data backup	₹600/request	₹600/request	₹600/request
De-duplicate data	-	✓	✓
Import history	Past 60 days	Past 60 days	Past 60 days
<b>Security Administration</b>			
Profiles	5	15	25
Organizational hierarchy (Roles)	5	10	250
Field-level security	-	✓	✓
Data sharing rules	-	-	15 rules/module
Groups	20	30	50
Record-level sharing	-	-	✓
Data Encryption (EAR)	-	-	✓
Territory management	-	-	150 territories
Audit Logs	✓	✓	✓
Allowed IPs	✓	✓	✓
<b>Product Customization</b>			

	Standard	Professional	Most Popular Enterprise
Rename tabs	✓	✓	✓
Custom fields	10 fields/module	155 fields/module (Note: Activities module has only 140 fields)	310 fields/module (Note: Activities module has only 230 fields)
Picklist history tracking	-	-	✓
Custom links	-	10/module	10/module
Web tabs	-	-	25
Custom modules	-	-	50 modules
Custom buttons	-	-	50/module
Sandbox	-	-	✓
Page layouts	-	-	3/module
Canvas View	-	-	(3 views/module/ org. with every user license)
Layout Rules	-	-	10/layout
Validation Rules	-	5 rules/layout	10 rules/layout
Subforms	-	-	2/module
Translations	-	-	✓
Reporting Hierarchy	-	-	✓
Multi-select Lookup	-	-	2/module
Unique fields	2 fields/module	2 fields/module	2 fields/module
Custom list views	50/module	Unlimited	Unlimited
Tab groups	10 groups	10 groups	25 groups
<b>Workflow Management</b>			
Workflow rules	6 rules/module 5 conditions/rule	20 rules/module 5 conditions/rule	50 rules/module 10 conditions/rule
Email Notifications	5 emails/rule 100 emails/ User License 5000 emails/ Day	5 emails/rule 200 emails/ User License 5000 emails/ Day	5 emails/rule 300 emails/ User License 5000 emails/ Day
Task Action	5/action	5/action	5/action
Field update Action	-	3 updates/action	3 updates/action

	Standard	Professional	Most Popular Enterprise
Webhook Action	-	1/action 10000 calls/day or 100 calls/user license/day. Limit applicable for the org. (whichever is lower)	1/action 20000 calls/day or 500 calls/user license/day.Limit applicable for the org. (whichever is lower)
Convert Action	✓	✓	✓
Functions	-	-	1 Instant Action and 5 Scheduled Actions per Rule
Scheduled actions	-	-	5/workflow rule
Workflow Usage	-	-	✓
Approval process	-	-	✓
Assignment rules	-	20 rules & 20 rule entries	20 rules & 50 rule entries
Schedules	-	-	✓
Case escalation rules	-	-	✓
<b>Process Management</b>			
Active Blueprints per organization (Inclusive of default Blueprints)	-	3	20
Common Transition per Blueprint	-	2	5
Transition per Blueprint	-	10	100
Field count during Transition	-	4	10
<b>Add-ons &amp; Integrations *</b>			
CRM Marketplace (Extensions for Zoho CRM)	✓	✓	✓
Zoho PhoneBridge for Call Centers	✓	✓	✓
Integration with Zoho Motivator	✓	✓	✓
Integration with Zoho Campaigns	✓	✓	✓
Integration with Zoho Analytics	✓	✓	✓
Integration with Zoho Projects	✓	✓	✓
Integration with Zoho SalesIQ	✓	✓	✓

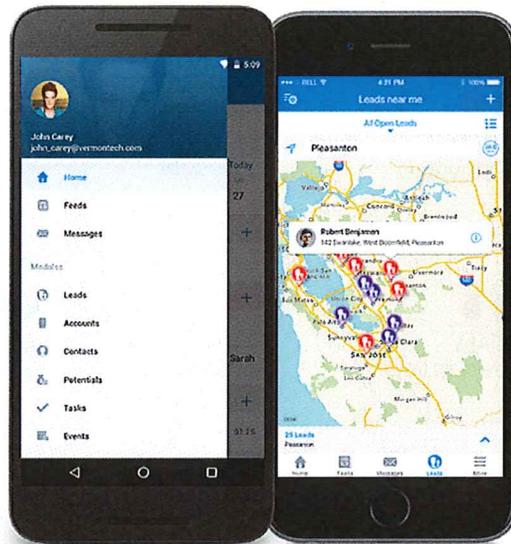
	Standard	Professional	Most Popular Enterprise
Integration with Zoho Desk	✓	✓	✓
Integration with Zoho Cliq	✓	✓	✓
Zoho Survey Integration (Survey campaigns can only be created in Enterprise edition and above)	✓	✓	✓
Zoho Webinar Integration	-	-	✓
Integration with Zoho Social	✓	✓	✓
Integration with Zoho Forms	✓	✓	✓
Zoho Mail Add-on	-	✓	✓
Zoho Writer Add-on	-	✓	✓
Zoho Finance Suite Integration (Includes Zoho Books, Zoho Invoice, Zoho Expense, Zoho Inventory and Zoho Subscriptions.)	-	✓	✓
Plug-in for Microsoft Outlook	-	✓	✓
Plug-in for Microsoft Office	-	✓	✓
Integration with Zoho Creator	-	-	✓
Slack Integration	✓	✓	✓
Zoho SalesInbox	-	-	✓
<b>Integration with Google Apps</b>			
Zoho CRM contextual gadget for Gmail	✓	✓	✓
Export events to Google Calendar	✓	✓	✓
Export to Google Tasks	✓	✓	✓
Zoho CRM web forms for Google Sites	1/module	10/module	20/module
Synchronize Google Calendar	✓	✓	✓
Synchronize Google Contact	✓	✓	✓
<b>Developer Tools</b>			
Mobile SDK	-	-	✓
Web Apps SDK	-	-	✓
Widgets	-	-	✓

	Standard	Professional	Most Popular Enterprise
Connections	-	-	✓
APIs **	100000 credits/day/ org.	500000 credits/day/ org.	1000000 credits/day/ org.
Functions	15,000 credits/day/org.	20,000 credits/day/ org.	100,000 credits/day/ org.
Functions - Send Mail	1000 emails/day.	1000 emails/day.	1000 emails/day.

\*\* API limits vary based upon user license purchased. Please visit here to [know more](#).

\* Integrations with third-party vendors and products within the Zoho family often require paid licenses from both Zoho CRM and the integrated software.

## Mobile features on every plan.



- Access customer emails
- Locate prospects anywhere across the globe
- Manage inventory
- Work offline
- Log phone calls
- Add voice notes
- Check-in
- View customer location in Google Maps
- Collaborate using feeds
- Attach files from Zoho Docs





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## ZOHO CRM

Zoho CRM 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.

[www.zoho.com/crm](http://www.zoho.com/crm)

### Useful links.

[Help center](#)

[Watch demo videos](#)

[Join our webinar](#)

[Customer stories](#)

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# 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 an 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

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

## 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	20/Department/Module
Time Based Rules	20/Department/Module
Ticket Assignment Rules	15 Rules
Macros	20/Department/Module
Blueprint <span style="color: red;">New</span>	Yes
<b>Service Level Agreements (SLA)</b>	
No. of SLAs	10/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		30
Roles		250
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

Feature	Availability
<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;">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	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
<b>Connectors</b>	
Files & Feeds	Yes
Relational Databases	Yes
Cloud Storage	Yes
CRM	Yes
Projects	Yes
BugTracker	Yes
REST API for Integration	Yes
Facebook	<b>New</b> 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
Dashboard Access Control	Yes
<b>Targets / Scorecards</b>	
Company Targets / Scorecards	Yes
Team Targets / Scorecards	Yes
Individual Targets / Scorecards	Yes
<b>Contests</b>	
Number of Concurrent Contests	Unlimited
<b>Motivator TV</b>	
Standard TV Channels	Yes

Contest TV Channels	Yes
KPI and Target Leaderboards	Yes
<b>Mobile Edition</b>	
Zoho Motivator for Android	Yes
Zoho Motivator for iPhone and Android	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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