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CRM

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Users can easily customize Zoho CRM to reflect the needs of their business, including the ability to add custom modules, buttons, and fields, with customization capability varying based on the plan purchased.

Zoho CRM is designed to work with other Zoho applications which include word processing, spreadsheet, accounting, project management, invoicing, and marketing applications.

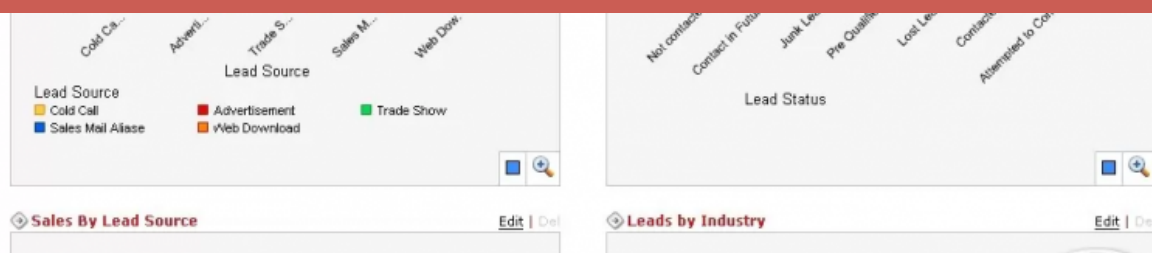
Zoho CRM offers an intuitive navigation screen, providing new users with a variety of tools and resources that make application setup a breeze, making it easy to be up and running in days, not weeks. The product also offers the Create Dashboard feature, which allows users to create custom dashboards that suit their needs.

Zoho CRM is designed for easy implementation, with new users able to get the application up and running quickly. Users can choose from four plans, with the ability to scale up to a more robust plan if necessary. All Zoho CRM plan levels include easy lead management, along with contacts, accounts, deals, and tasks, including upcoming events, with features such as Artificial Intelligence (AI), and marketing automation features including mass email, marketing campaigns, and integration with Google Ads available in the more expensive plans. An inventory management feature is available for those who sell products, but only the Enterprise plan offers a user portal.

Zoho CRM is designed to integrate with other Zoho applications including Zoho Motivator, Zoho Analytics, Zoho Desk, Zoho Projects, and Zoho Forms. In addition, Zoho CRM also integrates with third party applications such as Slack, with plug-ins available for both Microsoft Office and Outlook. Integration with Google apps is also available.

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Contacts and

current client relationships are easily managed in Zoho CRM, with the ability to assign both contacts and clients to a specific employee. The ability to integrate with both email and calendar applications allows users to easily manage all client activity from a single database.

Zoho CRM includes workflow automation that allows firms to easily create custom workflows along with automatic actions and alerts. Workflow rules are limited in the free plan, with the Standard, Professional and Enterprise plans offering the ability to create between 20-50 rules.

Reporting in Zoho CRM is good, with all plans offering more than 40 standard reports including a Contact Mailing List, Accounts by Industry, Lost Deals, Open Deals, and Sales by Lead Source, along with activity reports such as Tasks and Events, Today's Calls, and Call Status report. Additional reporting options are available in the more expensive plans with unlimited custom reports available in both the Professional and Enterprise plans. Users can easily share reports with co-workers and clients, and all reports can be exported to a CSV file, to Excel, or saved in the application as a PDF.

Zoho CRM offers excellent help and support resources, including the CRM Setup feature, which provides new users with access to a variety of tools including organization settings, user and profile creation, and CRM customization. A comprehensive, fully searchable knowledgebase is also available for users to search, with how-to videos and webinars easily accessible from the Resources menu. Zoho also offers various training options for those interested. Email support is available

for all plans, with toll-free support available at no cost for Standard, Professional,

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2020 Rating – 4.75 Stars

Strengths:

- Four plans available
- Excellent help resources available for new users
- Customizable

Potential Weaknesses:

- User portal only available in most expensive plan
- Performs better if used with other Zoho applications

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