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word processing, spreadsheets, project management, sales, marketing, databases, online ...

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[\[Read more on CRM for accounting firms.\]](#)

Zoho offers a collection of cloud-based office productivity suites that is an alternative to Microsoft Office products, plus offers considerable more, including word processing, spreadsheets, project management, sales, marketing, databases, online meetings, presentations, invoicing and CRM. This full suite offers thorough integration, allowing detailed management of all aspects of client engagements and communications.

Strengths

- Comprehensive suite of cloud-based utilities, allowing anytime access
- User-friendly interface and customization options
- Strong role-based security features
- Advanced analytics and reporting functions track KPIs, and offer forecasting

Potential Limitations

- The system is very extensive, which could require training and implementation

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and staff engagement, with extensive customization options that allow firms to tailor the system specifically to their needs. The system automates most of the tracking functions, and client relationships and contacts can be assigned to specific firm staff members or groups. Integrations with email and calendaring functions provide templates for communication and creation of calendar items from within client records, with all activity tracked by the program.

The system includes notable workflow automation functions that help create standard workflow processes based on firm needs and best practices, with automated actions and alerts based on due dates, client activity or firm staff actions. The system can even tie into the firm's website, with custom contact us and data collection forms that can also automatically notify appropriate staff when prospects fill them out. Firms can use this tool for a variety of purposes other than prospects, though, including creating tax organizers and other data collection forms for use with current clients.

The comprehensive system maintains a single database across all of the apps, ensuring data integrity, while also providing a deep warehouse of information on client and firm activity, productivity and analysis.

Summary & Pricing

Zoho apps are available individually or in bundles, and free trials and "freemium" versions are available. Pricing for full use of the cloud-based CRM app starts at \$12 per user per month. Additional versions and multi-user pricing options are available.

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