



# ZOHO CRM

# EXTENDED PROFILE



## OVERVIEW

Zoho CRM is a cloud-based software package aimed at small to medium sized businesses. Companies can download the software for free for up to 10 users, making it suitable for firms new to CRM.

A key feature is Zoho CRM's multichannel support, which allows users to keep track of all their client interactions in a single place, regardless of whether they take place online, over the phone or in person.

Moreover, the Phonebridge functionality gives users the ability to start calls and view client information from the same place.

SalesSignals is part of a new Zoho CRM release that allows users to reach out to sales prospects in real time. A live prospects feed allows users to watch their customers interact with their marketing campaigns and engage them in conversation.

The free version of Zoho CRM is available indefinitely for up to 10 users and clients only pay for additional users or features beyond the core set. The premium packages are available on a per-user, per month pricing structure and include extra functionality such as macros, inventory management, and customization. All versions of Zoho CRM are available via iOS and Android applications.

## FEATURE OVERVIEW



## SOFTWARE SPECIFICATION

OVERVIEW	
PRODUCT NAME	Zoho CRM
SOFTWARE FEATURES	
API ACCESS	✓
CADENCE	✓
CONTACT MANAGEMENT	✓
CONTRACT MANAGEMENT	✗
DATABASE MANAGEMENT	✓
FUNNEL REPORTING	✓
INTEGRATIONS	✓
PARTNER TRACKING	✗
PERFORMANCE REPORTING	✓
PIPELINE MANAGEMENT	✓
PRODUCT & PRICE CONTROL	✗
SALES GAMIFICATION	✓
QUOTATION HANDLING	✗

TASK ASSIGNMENT	✓
TERRITORY/QUOTA MANAGEMENT	✓
<b>SUPPLEMENTARY FEATURES</b>	
CPQ	✗
CUSTOMER SERVICE AUTOMATION	✓
MARKETING AUTOMATION	✓
SOCIAL RELATIONSHIP MANAGEMENT	✓
<b>CUSTOMER SIZE</b>	
SMALL (1-50 USERS)	✓
MEDIUM (51-200 USERS)	✓
ENTERPRISE (201+ USERS)	✓
<b>OTHER FEATURES</b>	
MULTIPLE LOCATIONS	✓
MULTIPLE CURRENCY	✗
CUSTOMIZABLE	✓
<b>MOBILE FEATURES</b>	
IOS APP	✓
ANDROID APP	✓
NATIVE WEB APP	✓
<b>HOSTING METHOD</b>	

CLOUD	✓
ON-PREMISE	✗
<b>FURTHER INFORMATION</b>	
PRICING	\$12/user/month

## SOFTWARE SCREENSHOTS

**ZOHO CRM** Old Version Feedback Upgrade Setup Profile

Home Emails Leads Accounts Contacts Potentials Reports Dashboards Activities Invoices More...

Welcome Charles Stone at Zillum Inc. Blue Tab | Black Tab

### My leads

Lead Name	Company	Phone	Email
Elizabeth Robinson	Imperial	800-555-0112	r.elizabeth@samplecompany.com
Emma Clayton-Basset	Villa Margarita	800-555-0104	e.clayton@samplecompany.com
Hamid Ali Syed	Omas Missa	800-555-0107	s.hamidali@samplecompany.com
Karl Dorman	Mediteran	800-555-0114	d.karl@samplecompany.com
Marc Badger	Ambassador	800-555-0113	b.marc@samplecompany.com

### My Prospects

Potential Name	Amount	Stage	Closing Date
500 users deal	\$5,000.00	Negotiation/Review	09/29/2011
Zillum Incv - Deal for 100k	\$1,000,000.00	Closed Won	06/22/2011
ACME Corp-	\$10,000.00	Closed Won	05/16/2011
Catherine Burns	\$3,500.00	Closed Won	04/16/2010
Carlton Robert Thorpe	\$1,600.00	Proposal/Price Quote	04/15/2010

### Dashboards by Status

#### Leads By Status

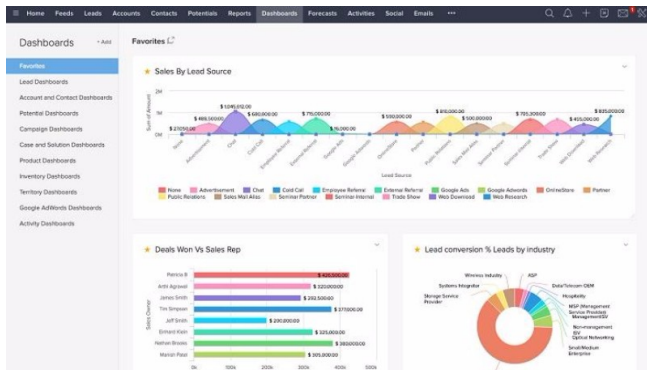
Lead Status	Record Count
Contact in Future	3
Contacted	5
Not Lead	4
Not Contacted	7

### SalesPipeline

#### Pipeline By Stage

Stage

- Qualification
- Needs Analysis
- Value Proposition
- Proposal/Price Quote
- Negotiation/Review



Home Feeds Leads Contacts Accounts Potentials Activities Documents Reports

### Customers

**Set up POC** Aug 27 HIGH  
GB Parties- Winston Zed...  
Boyle Patricia Completed  
\$1,000.00

**Collect Check** Aug 27 HIGHEST  
Amazon-Buil...-Jim Brown  
Boyle Patricia Completed  
\$10,000.00

**Follow up with Phon...** Aug 27 HIGHEST  
Amazon-Buil...-Jim Brown  
Boyle Patricia Not Started  
\$10,000.00

### Open Potentials

**Submit RFP** Aug 6 HIGHEST  
Zilum Gears- John Smith  
Boyle Patricia Not Started  
\$1,300.00

**Follow up with Phon...** Aug 6 HIGHEST  
Zilum Gears- John Smith  
Boyle Patricia Not Started  
\$1,300.00

**Send Welcome Email** Aug 5 HIGH  
Zilum Gears- John Smith  
Boyle Patricia Completed  
\$1,300.00

### Leads/Contacts

**1st Follow-up email** Sep 26 NORMAL  
Maria Hook  
Boyle Patricia Not Started

**Send 2nd Follow-up ...** Sep 26 NORMAL  
Jim Roots  
Boyle Patricia Completed

**Send Invitation to Se...** Sep 26 NORMAL  
Mobeen Bha...  
Boyle Patricia Completed

**Setup Online Meeting** Sep 26 NORMAL  
Jim Malva  
Boyle Patricia Not Started

### Others

**Product Demo** Apr 21 HIGH  
Matia Health...  
Boyle Patricia Not Started

**Followup** Feb 27 HIGH  
Texas Oil and ...  
Boyle Patricia Completed

Home Leads Accounts Contacts Potentials Reports Activities

Send Mail | Search | Show Actions

Lead Name	Company	Phone	Email
Damon House	Costco	1-661-951-1788	Damon.House@Costco.com
Yeu Page	Costco	1-885-585-6364	Yeu.Page@Costco.com
Ervin Francis	Costco	1-384-611-3217	Ervin.Francis@Costco.com
Maddison Maddison	Costco	1-526-917-8284	Maddison.Maddison@Costco.com
Ryke Madson	Costco	1-128-818-0771	Ryke.Madson@Costco.com
Kelko Parka	Costco	1-321-811-8235	Kelko.Parka@Costco.com
Margaret Hooper	Citibank	1-351-851-4200	Margaret.Hooper@Citibank.com
Lamar Buckley	Citibank	1-746-943-1611	Lamar.Buckley@Citibank.com
Col Fry	Citibank	1-920-822-3568	Col.Fry@Citibank.com
Dieter Carpenter	Citibank	1-652-172-6334	Dieter.Carpenter@Citibank.com

15 Records per page | Page Count: 1 to 15

Home Feeds Leads Contacts Accounts Potentials Reports Dashboards

Welcome Patricia Boyle at Zylker Inc.

#### Tasks for the day

Subject	Due Date	Status	Priority	Activity Type
Follow up Call (Lead)	29/04/2015	Initiated	High	Task
Meet Clients	02/05/2015	Not Started	High	Task
Follow up Lead	05/05/2015	Initiated	High	Task
Schedule Overseas Call	06/05/2015	Not Started	Low	Task
Teams Meeting	12/05/2015	Not Started	Low	Task

#### Leads by Status

Lead Status	Count
Qualified	1
Not Contacted	1
Contacted	1
Pre Qualified	1
Junk Lead	1