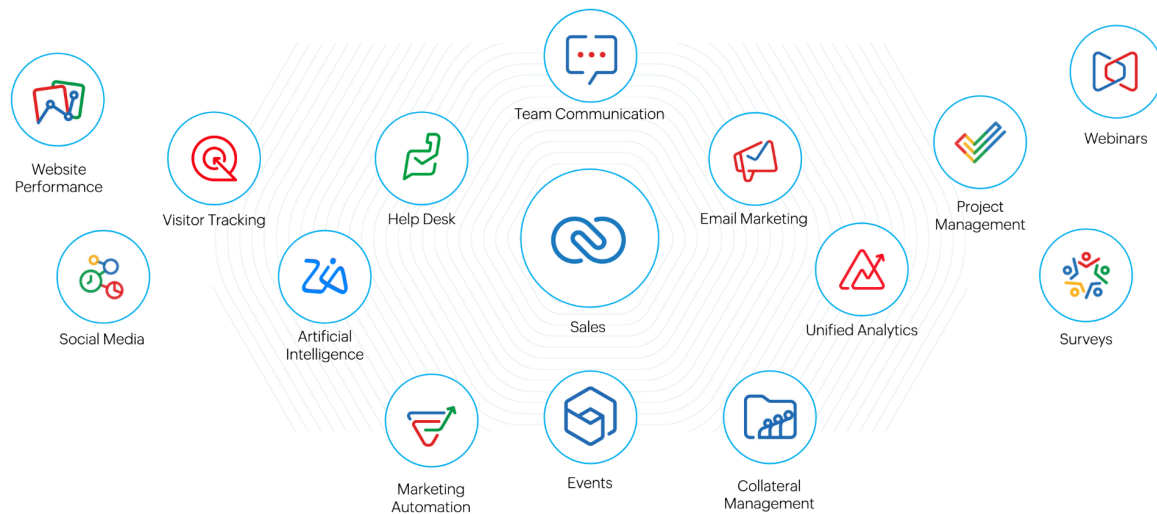


The Unified Customer Experience Platform.

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 one of a 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 \$57/user/month (paid annually), the Zoho CRM Plus platform offers you a unified platform powered by the following modules catering to each of your customer-facing teams:

1. CRM for sales automation
2. SalesIQ for visitor tracking
3. Desk for support management
4. Projects for projects collaboration
5. Campaigns for marketing automation
6. Social for social media management
7. Survey for customer surveys
8. Analytics for metrics and KPI
9. Marketing Automation for personalizing customer journeys
10. PageSense for tracking and analyzing website performance
11. Webinars for capturing your audience
12. Backstage for managing events
13. WorkDrive for online file management
14. Cliq for streamlining communication

Along with Zia, an AI-powered live-chat interface.

CRM - Sales Force Automation

Feature	Availability
Sales Force Automation	
Leads	Yes
Contacts	Yes
Accounts	Yes
Deals	Yes

Sales Forecasting	Yes
Forecasting Based on Territories	Yes
Macros	Yes
Feeds	Yes
SalesSignals	Yes
Document Library	Yes
Activities	Yes
Reminders	Yes
Recurring Activities	Yes
Calendar Booking	Yes
Multiple Currencies	50 Currencies
Social	Yes
Social Tab	Yes
Scoring Rules	50 criteria/module
Multiple Scoring Rule	5 rules/layout (50 criteria/rule)
Motivator for Zoho CRM	Yes
CRM Analytics	
Standard Reports	Yes
Custom Reports	Unlimited
Schedule Reports	Maximum 200 schedules
Standard Dashboards	Yes
Custom Dashboards	Unlimited
Charts and KPIs	Yes
Anomaly Detector	20 trends Additional 2 trends/user license (max 100)
Zia Notification subscription for Anomaly Detector components	30 components

Comparator, Target Meter, Funnel and Zones	Yes
Cohort Analysis	25
Quadrant Analysis	Yes
Stage Component	Yes
Marketing Automation	
Campaigns	Yes
Mass Email	2000/day/org
Custom Email Templates	Unlimited
Email Opt-out	Yes
Autoresponders	5 autoresponders
Schedule Mass Email	10/module
ZIA	
Prediction builder	20/org
Zia scoring	Yes
Recommendation builder	10/org
Email Intent	Yes
Email Sentiment	Yes
Email Emotion	Yes
Email Activity Extraction	Yes
Enrichment from Emails	Yes
CNS (consecutive negative sentiment)	Yes
Email summary	Yes
Email - Sentence Auto complete	Yes
Call transcription	Yes
Call sentiment	Yes
Call intent	Yes

Call emotion	Yes
Call Summary	Yes
Data Enrichment	2000 records/user license Max of 50000 records
Next Best Experience	Yes
Zia for forecast	Yes
Voice of the customer	Yes
Zia Vision - Image matching	20/org
Churn Prediction	20/org
Competitor alert	Yes
Strategy Influencer	6/org
Best time to contact	Yes
Record owner suggestion	Yes
Similarity recommender	10/org
Zia Notifications	Yes
Workflow rule suggestion	Yes
Workflow email duplicate alert	Yes
Anomalies in workflow rule	Yes
Ask Zia	Yes
Macro suggestion	Yes
Zia Reminder	Yes
Prediction analytics	Yes
Recommendation analytics	Yes
Best time to contact analytics	Yes
Inventory Management	
Products	Yes
Price Books	Yes

Quotes	Yes
Sales Orders	Yes
Invoices	Yes
Vendors	Yes
Purchase Orders	Yes
Inventory Templates	Yes
CPQ	
Product Configurator	
Total number of product configurations	100
Number of "selected" items you can create a rule for	20
Number of "additional conditions" per "selected" entry in a rule	25
Number of module-based conditions under Primary Rule Criteria	25
Total number of Actions per rule	50
Price Rules	
Total number of price rules	100
Number of module-based conditions under Primary Rule Criteria	25
Number of records that can be selected per rule in the "Direct Type" price rule	25
Number of records that can be selected per rule in the "Volume Type" price rule	5
Number of range rows that can be added per item in the "Volume Type" price rule	10
Guided Selling	
Number of Guided Selling flows	100
Number of Questions that can be added in a Guided selling flow	10

Number of Input Options applicable across all question pages	18
CUSTOMER SUPPORT	
Cases	Yes
Solutions	Yes
Web-to-Case Form	100 forms/module
Notify Owner	Yes
Case Escalation Rules	Yes
Data Administration	
Admin Tools for configuration management	Yes
File Storage (for Org.)	5GB plus 1GB/user license
Additional File Storage (for Org.)	\$5.75/month for 5GB
Data Storage (1-200 users)	10GB (5 Million records approx)
Additional Data Storage (1-200 users)	\$4 for 100MB /month
Data storage (> 200 users)	30GB (15 million records approx)
Additional Data Storage (> 200 users)	\$2 for 100MB /month
Default Data Storage per user license	100MB
Import Data	50,000/batch
Data Import - Clone option	Yes
Data Import - Skip and Overwrite option	50,000 records/batch
Merge Duplicates - Find & Merge Option	Yes
Merge Duplicates - Deduplicate Option	Yes
Import History	Past 60 days
Export Module Data	200,000 records/module, upto 1000 exports per day
Free Data Backup	4 data backups/month
Data Backup	\$12 /request

CRM Variables	11 groups + 25 entry/group
Security Management	
Profiles	200
Roles	500
Reporting Hierarchy	Yes
Territory Management	250
Groups	250
Field-Level Security	Yes
Custom Links	50 links/module
Default Data Sharing Settings	Yes
Public Read Only (in Default Data Sharing Settings)	Yes
Data Sharing Rules	100 rules per module (Up to 15 criteria-based sharing rules)
Audit Logs	Yes
Allowed IPs	Yes
Record Sharing	Yes
Data Encryption	20 fields/module
GDPR Compliance Settings	Yes
HIPAA Compliance Settings	Yes
Product Customization	
Customization Features	
Home Page Components	20
Organize Tabs	Yes
Rename Tabs	Yes
Group Tabs	50 groups
Custom Modules	50 modules + (additional 5 modules/user license) [Max limit: 500 custom modules]

Layout Editor	Yes
Page Layouts	6 layouts/module (Note: Not applicable for Activities module)
Layout Rules	10/layout
Record Locking Configuration	5 rules/module
Validation Rules	25/layout (Using Functions: 5/layout)
Subforms	5/module
Subform fields	25/subform in a layout
Email Address Duplication Check	Yes
Custom Fields	500 fields/module (Note: Activities module has only 230 Fields)
Unique Fields	2 fields/module
Picklist History Tracking	Yes
Color Coding Picklists	10 picklist fields/module
Global Sets	25 sets/org, 15 picklists/global set, 7 picklists/global set/module, 1000 picklist values/global set
Standard List Views	Yes
Custom List Views	Unlimited
Records in List Views	100
Smart Filter	10
Kanban View	10
Chart View	5
Modify Criteria Pattern	Yes
Last Activity Time in Criteria	Yes
Custom Related Lists	10/module
Customize Search Layout	Yes
Customize Related Lists Columns	Yes

Custom Buttons	250/module
Personal Fields	30 fields/module
Web Tabs	50
Copy Customization	Yes
Wizards	25 (5 per module)
Multiple Sales Pipeline	50
Customize User Layout	50 custom fields
Domain Mapping	Yes
Kiosk Studio	10 kiosks
Canvas	
List View	50 views/module
Detail View	25 views/module
Canvas Rules	25 rules/module
Reusable components	25 components/org
Import/Export Canvas views	10 views/org
Maximum limit for individual field types	
String fields (Single Line, Multi Line, Pick List, Multi-select Pick List, Email, Phone, URL, and Auto Number) Maximum 10 Text Area fields	200 (includes upto 5 Rich Text Fields)
Integer Fields	40
Number fields	40
Date Fields	50
Date Time Fields	50
Boolean (Checkbox)	80
Long Integer Fields	35
External Fields	15
Lookup Fields	10

Multi-select Lookup Fields	2
Lookup Filter	Yes
Fields of Lookup	5 fields/lookup field
User Fields	5
Record Image Field	Yes
File Upload Field	5
Auto-number Fields	1
Formula Fields	25
Multi-user Field	1
Image Upload Field	2
Rollup summary	15
Special Fields	
Contact Role	Yes
Terms & Conditions	Yes
Tax Rates	Yes
Process Management	
Blueprint	100 Blueprints (Includes the default Blueprints)
Clone Blueprint	Yes
Common Transition per Blueprint	25
Transition per Blueprint	300
Field Count During Transition	50
Approval Process	Yes
Review Process	10/module
Journey Builder	10 journeys /org (includes both active and inactive journeys)

PathFinder	1,00,000 record captures/day, and 2,00,000 transitions/day across all processes.
Automation	
Workflow Rules/org	2500 (maximum 2000 active)
Workflow Rules	150 rules/module (maximum 100 active) 10 conditions/rule
Scheduled Action	5 actions/condition
Workflow Usage	Yes
Tasks	5 tasks/action
Reminder for Workflow Tasks	Yes
Email Notifications	5 email notifications/Action, 1,000 emails/User License, 50,000 emails/Day (whichever is lesser)
Record Owner, Record Creator, Record Owner's Manager	Yes
Using Email field from the Module & Related Modules	Yes
Field Updates	5 field updates/action
Delete	Yes
Field Update	Yes
Create Record	Yes
Assign Record Owner	Yes
Workflow Convert	Yes
Execute Based on Date Field Value	Yes
Execute Based on Record's Score	Yes
Execute Based on Recommendation	Yes
Webhooks	1/action 1,000,000 calls/day or 1000 calls/ per /day Limit applicable for the org. (whichever is lower)
Actions by Zoho Flow	Yes

Assignment Rules	50 rules/module & 100 rule entries
Assignment Thresholds	30 thresholds per module & 500 users per threshold
Functions	1 Instant Action and 5 Time-Based Actions per Rule
Custom Schedules	20 schedules/org
Marketing Attribution	Yes
Segmentation	5 (active or inactive) 20 (unpublished or draft)
Workflow Usage Report	Yes
Cadences	300 cadences, upto 25/module, maximum 20 email, 20 task, and 10 call follow-ups
Webforms	
Forms for Leads/Contacts	100 forms/module
Approve Records	Yes
Auto Response Rules	Yes
Unsubscribe Links	10
Notify Record Owner	Yes
Webform Analytics	300,000 visits/month and 6 months of data for Analytics
Webform A/B Testing	10 webforms/module
Email	
Email Integration (IMAP/POP3/Gmail API)	Yes
Email Insights	Yes
Organization Emails	500
BCC Dropbox	10 approved email addresses
Attachments in Email	10MB
Email Sharing	Yes

Email Scheduling	Yes
Email Authentication	20 Domains
Email Parser	Yes
Email Association with Deals	Yes
Email Relay	20 domains
Zoho CRM for Office 365	Yes
Zoho CRM for Gmail Add-on	Yes
SalesInbox	Yes
Integration	
CRM Marketplace (Extensions for Zoho CRM)	50
Zoho Creator Integration	Yes
Integration with Online Meeting providers	Yes
Visitor Tracking Zoho SalesIQ Integration	Yes
Zoho Survey Integration	Yes
Survey Creation in Campaigns Module	Yes
Zoho Writer Add-on	Yes
Zoho Desk Integration	Yes
Zoho Projects Integration	Yes
Zoho Finance Suite Integration	Yes
Zoho PhoneBridge	Yes
Zoho Analytics Integration	Yes
Zoho Campaigns Integration	Yes
Zoho Forms Integration	Yes
Zoho Webinar Integration	Yes
Zoho Backstage Integration	Yes
Zoho Meetings Integration	Yes

Mail Merge Template (Plug-in for Microsoft Office)	1000 merges/month/org
Attach from Zoho Docs	Yes
Attach from Google Docs	Yes
Google Calendar Synchronization (For Google Users)	Yes
Google Contacts Synchronization (For Google Users)	Yes
Zoho CRM for Google Ads	Yes
Slack Integration	Yes
Zoho CRM Mobile Edition	Yes
Zoho CRM Analytics Mobile Edition	Yes
Check-in	Yes
Zoho Directory Integration	Yes
Remote Sales Office	Yes
LinkedIn Sales Navigator Integration	Yes
WhatsApp Business	Yes
Google Chat Integration	Yes
Google Workspace	
Export Meetings to Google Calendar	Yes
Export to Google Tasks	Yes
Synchronize Google Calendar (For Google Workspace Users)	Yes
Synchronize Google Contact (For Google Workspace Users)	Yes
Zoho CRM Webforms for Google Sites	100/module
Developer Hub	
APIs (Max allowed credits)	Unlimited (2,000/user)
Functions - (Max allowed credits)	Unlimited (1,000/user license)
Client Script	Yes

Widgets	Yes
Connections	Yes
General	
Personal Settings	Yes
Company Logo and Theme	Yes
Fiscal Year	Yes
Business Hours	Yes
Portals	10,000 portal invites included for default portal (Contacts)
Sandbox	Yes
Business Card View	Yes
Calendar	Yes
Calendar Synchronization (CalDAV Access)	Yes
Advanced filters	Yes
Tags for Records	10 tags/record 200 tags/module
Sticky Notes	Yes
Translations	Yes

SalesIQ - Visitor Tracking & Sales Intelligence

Feature	Availability
Branding	
Company favicon	Yes
Company logo	Yes

For Operations	
Roles and permissions	Yes
Chat volume per month	Unlimited
Departments	25 + (number of brand Purchased x 3)
Proactive chat trigger rules	100
Chat routing rules	100
Visitor routing rules	25+number of operator licenses purchased (Max limit - 100)
Block IP	Yes
Profanity management	10 libraries
Smart suggestions	Yes
Chat translation	Yes
Tags	30
Chat transfer	Yes
Group chat with customers	Yes
Chat history	Unlimited
Concurrent chat limit	Yes
Chat queue	Yes
Brand-specific business hours	Yes
Department based email configuration	Yes
Email templates	Unlimited
Company profile enrichment Zia	Yes
Conversation monitor	Yes
Visitor Insights	
Live visitor dashboard	Yes
Monthly visitor tracking limit	200K
Lead scoring rules	100

Company scoring rules	100
Chatbots	
Custom chatbots	10
Answer Bot Zia	Yes
Hybrid chatbot	Yes
People	
Visitors	Yes
Contacts	Yes
Company	Yes
Export People data	Yes
For your customer	
Offline messaging	Yes
Visitor-side chat history	Yes
Chat reopening	Yes
Credit card masking	Yes
Live chat Media	
File sharing	Yes
Voice note	Yes
Audio call	Yes
Screen sharing	Yes
Click to Call	
Call monitoring	Yes
Call transfer	Yes
Call queue	Yes
Call routing rules	100
Resources	
Articles	2000

FAQs	2000
Unanswered questions	Yes
Canned replies	5000
Small talks	10
Business terms	Yes
Channels	
Website	Yes
Mobile app	Yes
Email signature	Yes
Telegram	Yes
Instagram	Yes
Facebook Messenger	Yes
WhatsApp	Yes
LINE	Yes
Custom Tools	
Widgets	50
Brand-specific widgets	5
Form controller	100
Admin webhooks	3
Data webhooks	10
Reports	
Daily - Scheduled	Yes
Weekly - Scheduled	Yes
Monthly - Scheduled	Yes
Real-time reporting	Yes
Plugins	
Wordpress	Yes

OpenCart	Yes
Joomla	Yes
Drupal 7	Yes
Drupal 8	Yes
OSCommerce	Yes
Cs-cart	Yes
Magento	Yes
WooCommerce	Yes
PrestaShop	Yes
Sharepoint	Yes
Facebook	Yes
Integrations	
Zoho CRM	Yes
Zoho Desk	Yes
Zoho Booking	Yes
Zoho Checkout	Yes
Zoho Assist	Yes
Zoho Analytics	Yes
Zoho Campaigns	Yes
Google Translate	Yes
MailChimp	Yes
Zendesk	Yes
Salesforce CRM	Yes
ClearBit	Yes
Leadberry	Yes
Cloud telephony and PBX	Yes
DESKTOP APPS	Yes

OPERATOR MOBILE APP	Yes
APPLE TV APP	Yes

Desk - Customer Service Management

Feature	Availability
Ticket Management	
E-mail tickets	Yes
Comment in ticket	Yes
Private conversations in ticket	Yes
Spam tickets	Yes
Ticket history	Yes
Ticket resolution note	Yes
Ticket tags	50 tags/ticket
Add resolution as KB	Yes
Customer happiness ratings	Yes
Suggested articles	Yes
Merge tickets	Yes
Split tickets	Yes
Clone ticket	Yes
Ticket timeline	Yes
Read / Unread tickets	Yes
Followers	Yes
Time entry	Yes
Approvals	Yes

Team ownership	Yes
Ticket sharing	Yes
Send as email	Yes
Mass reply	Yes
Scheduled reply	Yes
Parent-child ticketing	Yes
Agent productivity	
Quick ticket view (Peek view)	Yes
Response editor with rich text support	Yes
Advanced search	Yes
Response draft	Yes
Table view	Yes
Keyboard shortcuts	Yes
Agent queue	Yes
Teams queue	Yes
Search facet	Yes
Snippets for faster response	Yes
Email templates in reply	Yes
Work modes	Yes
Review ticket replies	Yes
Gamescope for agents	Yes
Agent idle timeout	Yes
Real time collaboration	
Real Time Updates in Ticket List & Detail View	Yes
Real Time Ticket Count in Starred Views	Yes
Team Feeds	Yes

Agent Collision Detection	Yes
Agent Collision Chat	Yes
Agent Collision Reply Avoidance	Yes
Customer Support Channels	
Email channel	100
Help center	Yes
Feedback widget	1 / department
Advanced web forms	20 / department
X (Twitter)	2 brands
Facebook	2 brands
Instagram	2 brands
Community forums	Yes
Telephony	Yes
Live chat	Yes
Instant Messaging	
WhatsApp	Yes (Usage-based charges applied by WhatsApp)
Telegram	Yes
Wechat	Yes
LINE	Yes
Dashboard	Yes
WhatsApp sandbox	Yes
Canned messages	Yes
Auto-responses	Yes
WhatsApp template messages	Yes
Ticket conversion	Yes
Embeddable options	Yes

Profanity management	Yes
Chat transfer	Yes
Notifications	Yes
Custom workflows	Yes
Help Desk Automation	
Notification rules	Yes
Macros	30 / department
Workflow rules	30 / department / module
Supervise - Time-based rules	30 / department
Custom actions gallery in workflows	Yes
Custom functions in workflows	Yes
Schedules	10 / department
Field watching	Yes
Contract and support plans	Yes
Ticket assignment rules	
Direct assignment to agents and teams	30
Round-robin ticket assignment by load balancing	15 / department
Active skills	30 / department
Skill based ticket assignment	Yes
Round-robin sequential assignment	Yes
Advanced process Management - Blueprints	
Active blueprints	20 / department
Transitions per blueprint	100
Common transitions per blueprint	5
Fields and actions per transition	30
State level SLAs & escalations	Yes

Dynamic transition owner	Yes
Transitions draft (Partial transitions)	Yes
Blueprint widget support	3 / transition
Strict mode controls	Yes
Custom functions in blueprints	Yes
Service level Agreements (SLA's)	
Number of SLAs	20 / department
Stop the SLA clock (On hold state)	Yes
Multi-level escalations	Yes
Customer based SLA	Yes
Management in SLA	Yes
Helpdesk working hours	
Business hours	100
Holiday list	100
Helpdesk customization	
Custom email templates	Yes
Customize tabs	Yes
Customize form fields	Yes
Custom views	Yes
Starred views	Yes
Custom fields	230 / module
Custom ticket status & status grouping	Yes
Field dependencies	Yes
Teams	Yes
Ticket templates	600 / department
Department specific layout	Yes

Multi lingual (Beta)	Yes
Custom lookup fields	5 / module and layout
Layout rules	50 / department
Validation rules	Yes
Multi layout	20 / department
Custom modules	Yes
Regular expressions	Layout rules - 50 / department, Validation rules - 10 / department
Personalization	
Helpdesk appearance - Night mode	Yes
Display screen settings	Yes
Display font control	Yes
Reply editor font controls	Yes
Reply button behavior	Yes
Landing page settings	Yes
Reply - article auto suggestion	Yes
Default send behavior	Yes
Multi-language support	Yes
Date & time format control	Yes
ARTIFICIAL INTELLIGENCE - ZIA	
Reply assistant	Yes
Sentiment analysis	Yes
Ticket auto tagging	Yes
Anomaly services	Yes
Zia answer bot	Yes
Zia field predictions	Yes
Zia powered by chatGPT	Yes

Re-Branding	
Custom domain mapping	Yes
Multi - Department	
Multiple department support tracking	50
All-department view of tickets	Yes
Department based signatures	Yes
Department-Specific product handling	Yes
Help Center	
Private knowledge base for agents	Yes
Article versioning	Yes
Public knowledge base	Yes
Community	Yes
ASAP	Yes
Text-to-speech in ASAP mobile SDK	Yes
Multilingual knowledge base	Yes
Community gamification	Yes
301 redirection	Yes
Google analytics integration	Yes
Themes Gallery	Yes
CSS customization	Yes
Custom widgets	Yes
Auto-translation of KB articles	Yes
Answer bot in ASAP	Yes
Live chat in ASAP	Yes
Multi-brand help center	Yes
HTML customization	Yes

GUIDED CONVERSATION	
GC flows	25 / department
Global variables	100 / portal
Session variables	100 / portal
Local variables	100 / flow
GC blocks	500 / flow
GC widgets	Agent widget - 1 / department Customer widget - 5 / department
Flow metrics	Yes
Customer Management	
Contact & account information management	Yes
Private notes for contacts & accounts	Yes
Dedicated owners for contacts & accounts	Yes
Contact & account custom fields	Yes
Merge contacts	230
Merge accounts	Yes
Custom views for customers	Yes
Contact & account insights	Yes
Deduplicate contacts & accounts	Yes
Follow contacts & accounts	Yes
Contact to product association	Yes
Secondary contact (Cc's)	Yes
Contacts to multiple accounts	Yes
Activity	
Tasks	Yes
Events	Yes
Calls	Yes

Time tracking	
Manual Ticket Time Tracking	Yes
Auto Ticket Time Tracking	Yes
Activity Time Tracking	Yes
Billing Preferences	Yes
Products	
Product Based Ticket Tracking	Yes
Associate Products to Contacts	Yes
Associate Products to Accounts	Yes
Dedicated Owner for Products	Yes
Custom Fields for Products	230
Custom Views for Products	Yes
Analytics	
Agent dashboard	Yes
Predefined reports	Yes
Ticket overview dashboard	Yes
Ticket status dashboard	Yes
Customer happiness dashboard	Yes
Tickets stages	Yes
Custom reports	Yes
Export reports to CSV, XLS or PDF	Yes
Custom dashboards	Yes
Headquarters dashboard	Yes
Response, resolution & FCR dashboards	Yes
Knowledge base dashboard	Yes
Community dashboard	Yes

Calls reports and dashboards	Yes
SLA dashboards	100
Telephony agent availability	Yes
All department analytics (Global reports and dashboards)	Yes
Schedule reports	Yes
Blueprint dashboard	Yes
ZIA dashboard	Yes
Telephony	
In-Product call notifications	Yes
Call-to-Ticket conversion	Yes
Answer over-the-web	Yes
Answer over-the-phone	Yes
Call logging	Yes
Call transfer	Yes
Call recording	Yes
Call hold	Yes
Call mute	Yes
Business hours configuration	Yes
Non-business hour management	Yes
Call queue handling	Yes
Outbound calls	Yes
Missed call management	Yes
Custom greeting configuration	Yes
Call routing (Sequential & simultaneous)	Yes
Call waiting message	Yes
Caller history	Yes

Voice mail	Yes
Real-time agent availability	Yes
Call reports and dashboards	Yes
Fallback number	Yes
Spam call handling	Yes
Call summary	Yes
Multi-Level IVR	Yes
Agents and Permissions	
Profiles	50
Roles	250
Field-level access control	Yes
Data sharing	Yes
Add-ons & Integration	
G Suite	Yes
Zoho BugTracker	Yes
Zoho CRM	Yes
Zoho Analytics	Yes
Zoho PhoneBridge for Call Centers	Yes
Zoho Assist	Yes
Zoho Cliq	Yes
Zoho SalesIQ	Yes
Atlassian Jira	Yes
Slack	Yes
Zoho Books/Invoice	Yes
Salesforce	Yes
Zapier	Yes

Office 365	Yes
MS Teams	Yes
Zoho PageSense	Yes
Telephony and PBX	Yes
Zoho Marketplace for Zoho Desk	
Public extensions	Yes
Extension starter pack	Yes
Private extensions	Yes
Custom actions via extensions	Yes
Mobile Apps	
Radar app for Zoho Desk	Yes
Zoho Desk app	Yes
Security	
IP range restriction (active directory)	Yes
CSP policy header	Yes
SSL certificate	Yes
API dashboard	Yes
Single sign-on using SAML in help center	Yes
User authentication (JWT) in ASAP	Yes
Federated login	Yes
DKIM/DMARC	Yes
ePHI field labeling	Yes
Field encryption	Yes
System field encryption	Yes
Privacy	
Anonymization of agent and customer	Yes

Data center location	Yes
DSR - Data Subject Requests	Yes
Read recipients	Yes
Accessibility	
Highlight critical information	Yes
Underline links	Yes
Emphasis focus area	Yes
Animation controls	Yes
Reading mask	Yes
Zoom level adjuster	Yes
Screen reader	Yes
Keyboard focus navigation	Yes
Custom scrollbar	Yes
Developer Tools	
API	1,000,000 calls / day / org.
Mobile SDK	Yes
Webhook	10 Active
Deluge (Custom function)	Yes
Data Administration	
Export data	Yes
Import history	Past 60 days
Import data	30,000 / batch
Data backup (Beta)	1 full backup / month
Sandbox	Yes
Audit log	Yes
Data Migration	

Migration from other help desk	Yes
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Projects - Project Management & Collaboration

Feature	Availability
Basics	
Projects	Unlimited
Storage Space	120GB
Project Templates	30
Pages & Chat	All Projects
Read-only users	10
Resources	Can be purchased as add-ons
User Hierarchy	Yes
Charts/reports	
Gantt charts	Across projects
Workload Report	Across Projects
Advanced Task / Issue Reports	Advanced
Core features	
Tags	Yes
Project Feeds	Yes
Task management	Yes
Document sharing	Yes
Import from MS Project	Yes
Calendar & Forums	Yes
Google Apps Integration	Yes

Project Custom Status	Yes
Milestone Custom Status	Yes
Task Custom Status	Yes
Subtasks	Yes
Pre-Built Templates	Yes
Task Duration (Hours/Days)	Yes
Reminders	Yes
Project Timeline Gantt	Yes
Task Dependency	Across projects (All four types)
Task layout	Create
Sync Google Tasks	Yes
Time tracking	Yes
Export projects	Yes
Custom Views	Yes
Recurring Tasks	Yes
Timesheet approval	Yes
Time Log restriction	Yes
Blueprint for Tasks	Yes
Parallel Transitions	Yes
AI Chatbot powered by Zia	Yes
Project Budget	Yes
Work - Planned Hours (Planned vs Actual Report)	Yes
Business Hours	Yes
Weekends & Holidays	Yes
Strict Project	Yes
Task Rollup	Yes

Earned Value Management	Yes
Milestone Layout	Yes
Project Layout	Yes
Flexible work hours	Yes
Workflow Rules	Yes
Critical Path	Yes
Baseline	Yes
Multiple Baseline Support	Yes
Task Layout Rules	Yes
Project Custom Fields	155
Milestone Custom Fields	Yes
Task Custom Fields	255
Issue Custom Fields	120
Timesheet Custom Fields	55
Custom Profiles and Roles	Yes
Custom Domain	Yes
Web Tab	Yes
Teams	Yes
Issue Tracker	
Import Issues (CSV, XLS & JIRA)	Yes
Add issues through email	Yes
Export issues	Yes
Notifications	Yes
Business Rules	Yes
Web to Issue Form	Yes
Link Issues	Yes

Custom Fields	Yes
Email Settings	Yes
SLA	Yes
Webhooks	Yes
Custom Issue Email Templates	Yes
Integrations	
Zoho CRM	Yes
Zapier	Yes
Zoho Meeting	Yes
Zoho Sprints	Yes
Zendesk	Yes
Microsoft Teams	Yes
Office 365	Yes
Slack	Yes
ServiceNow	Yes
Zoho Invoice (For Invoice & Expenses)	Yes
Zoho Books (For Invoice & Expenses)	Yes
Zoho People	Yes
Dropbox	Yes
Zoho Analytics	Yes
Zoho Flow	Yes
Zoho Desk	Yes
Zoho Directory	Yes
SharePoint	Yes
GitHub	Yes
BitBucket	Yes

GitLab	Yes
Gitea	Yes

Campaigns - Email Marketing Campaigns

Feature	Availability
Design	
Basic template layouts	Yes
Pre-designed, responsive newsletter templates	Advanced
Drag-and-drop template editor	Yes
Template library	Yes
Email newsletters	
Unlimited emails	Yes
Email attachments	Yes
Chain campaign	Yes
Child campaign	Yes
A/B testing	Yes
RSS campaigns	Yes
Marketing calendar	Yes
Customizable header and footer	Yes
Remove Zoho Campaigns logo in footer	Yes
Reports and analytics	Yes
Contact management	
Basic segmentation of contacts	Yes

Advanced segmentation of contacts	Yes
Bulk segments	Yes
Customizable signup forms	Yes
Customizable pop-up forms	Yes
Topics	Yes
Contact scoring and tags	Yes
Personalization	
Merge tags	Yes
Dynamic content	Yes
Email polls	Yes
Email Delivery and Deliverability	
Schedule email campaigns	Yes
Recipient time zone sends	Yes
Recipient optimal open time sends	Yes
Send in batches	Yes
Email authentication using SPF/Sender ID, Domain Key/DKIM	Yes
Compliance check	Yes
Dedicated IP address	Available on a yearly basis
Email Marketing Automation	
Basic automated workflows	Yes
Advanced automated workflows	Yes
Built-in workflow templates	Yes
Account and user Management	
Users	Up to 20 users
Assign roles and privileges	Yes

Custom user roles	Yes
Campaign managerial approval	Yes
Email-sending policy	Yes
Workspaces	Yes
Ecommerce Email Marketing	
Pre-designed newsletter templates	Yes
Pre-designed cart-abandonment reminder templates	Yes
Contact, product, and coupon sync	Yes
Profile- and shopping-history segments	Yes
AI-based product recommendations	Yes
Store's revenue vs. email-based revenue	Yes
Automated purchase follow-ups	Yes
Automated cart-abandonment follow-ups	Yes
Cross-Channel Marketing	
SMS Marketing	Yes
Webhook	
Mailing-list-based notifications	Yes
Sent-campaign notifications	Yes
Developer API	
Campaign management	Yes
List management	Yes
Callback URLs	Yes
Integrations	
Zoho CRM	Yes
Zoho Creator	Yes
Zoho Survey	Yes

Zoho Contacts	Yes
Zoho Invoice	Yes
Zoho Books	Yes
Zoho Recruit	Yes
Zoho Meeting	Yes
Zoho Commerce	Yes
Zoho Flow	Yes
Zoho Desk	Yes
Zoho Backstage	
Zoho Bigin	Yes
SugarCRM	Yes
Salesforce	Yes
Tracking URLs with Google Analytics	Yes
Eventbrite	Yes
SurveyMonkey	Yes
Shopify	Yes
YouTube For video email campaigns	Yes
Vimeo for video email campaigns	Yes
Flickr Add images to the template gallery	Yes
Google Photos Add images to the template gallery	Yes
Gravatar	Yes
PayPal	Yes
Litmus	Yes
Giphy	Yes
Zapier	Yes
GoToWebinar	Yes

Evernote	Yes
Dropbox	Yes
OneDrive	Yes
Box	Yes
Wistia	Yes
HubSpot	Yes
MS Dynamics 365	Yes
Zendesk	Yes
WooCommerce	Yes

Social – Social Media Marketing

Feature	Availability
Basic	
Home Dashboard	Yes
Recent Posts	Yes
Notifications	Yes
Livestream	Yes
Create Custom Roles	Yes
Publishing & Scheduling	
Multi-channel Publishing	Yes
Custom Scheduling	Yes
Drafts	Yes
Published Posts	Yes
Scheduled Posts	Yes
Unpublished Posts	Yes

Publishing Calendar	Yes
Alt Text	Yes
Image Editor	Yes
Bulk Scheduler	Yes
Repeat Posting	Yes
CustomQ	Yes
SmartQ	Yes
Pause/Resume Post	Yes
Audience Targeting	Yes
RSS Feeds	20 Feeds
Custom Video Thumbnail	Yes
Schedule Retweets	Yes
Social Library	Yes
Media Library	Yes
Cloud Picker	Yes
Canva Integration	Yes
UTM Parameters	Yes
Facebook Reels	Yes
Instagram First Comment	Yes
Instagram Carousel Post	Yes
Instagram Stories	Yes
Instagram Reels	Yes
Tag Profiles on Instagram	Yes
Instagram Grid Preview	Yes
YouTube Shorts	Yes
Google My Business Events	Yes

Hashtag Groups	Yes
Trending Hashtags	Yes
Popular Posts	Yes
Post Insights	Yes
Export Posts	Yes
Discuss Posts	Yes
Zia - Generative AI	
Compose with Zia	Yes
Reply with Zia	Yes
URL Shortner	
zurl Link Shortner	Yes
Bit.ly Shortner	Yes
Inbox	
Manage Interactions	Yes
Filters	Yes
Custom Views	Yes
Assignment Rules	Yes
Track Activities	Yes
View History of Interactions	Yes
Messages	
Monitoring Dashboard	15 Columns
Facebook Page	Yes
Facebook Reviews	Yes
Facebook Page @mentions	Yes
X Timeline	Yes
X Likes	Yes

X @mentions	Yes
X Keyword Search	Yes
X User Search	Yes
X Lists	Yes
Instagram Hashtag Search	Yes
Google My Business Questions	Yes
Google My Business Reviews	Yes
Lead/Contact Interactions Monitoring	Yes
LinkedIn @mentions	Yes
YouTube Likes	Yes
YouTube Dislikes	Yes
YouTube Playlists	Yes
YouTube Moderate Comments	Yes
Connections	
Connections Dashboard	Yes
Most Engaged	Yes
Recently Engaged	Yes
X Followers/Following	Yes
PROFILE INFORMATION	
CRM Leads	Yes
CRM Contacts	Yes
Mute/Block Accounts	Yes
Connection Interactions	Yes
TEAM COLLABORATION	
Collaborate Dashboard	Yes
Workflow & Approvals	Yes

Tagging Discussions	Yes
Audio/Video Call Team Member	Yes
REPORTS	
Reports Dashboard	Advanced reports with data from last year
Published Post Stats	Yes
Custom Reports	Yes
Schedule Reports	Yes
Export Reports	Yes
Discuss Reports	Yes
Zoho CRM Integration	
Add Leads to Zoho CRM	Yes
Chat with CRM Owner	Yes
CRM Reports	Yes
View CRM Connections	Yes
View CRM Status & Information	Yes
Monitor Leads & Contacts	Yes
Rule-based Lead Generation	Yes
Zoho Desk Integration	
Create Tickets from Social Updates	Yes
Chat with Desk Owner	Yes
Desk Reports	Yes
Desk Info for Connections	Yes
Rule-based Ticket Generation	Yes
View Ticket IDs	Yes

Surveys - Customer Satisfaction Surveys

Feature	Availability
Survey Creation	
Number of Surveys	Unlimited
Number of Questions	Unlimited
Number of Responses (billed annually)	Unlimited
Number of Responses (billed monthly)	7000 responses/month
Label	Yes
Title	Yes
Number	Yes
In-mail Surveys	Yes
Create surveys on computers	Yes
Create surveys on tablets	Yes
iOS	Yes
Android	Yes
Easy Drag & Drop creation	Yes (with an easy to use touch interface as well)
Pagination	Yes
Redirect to a new page on submit	Yes
Right to left language support	Yes
Trash & restore surveys	Yes
Delete surveys	Yes
Duplicate surveys	Yes

Close or Deactivate survey	Yes
250+ Templates	Yes
DIFFERENT QUESTION TYPES & FIELDS	
Question Types	All
TEXT BASED QUESTION TYPES	
Number	Yes
Email	Yes
Short Answer	Yes
Long Answer	Yes
Multiple Textboxes	Yes
Full Name	Yes
Contact Information	Yes
Heading/Description	Yes
CHOICE BASED QUESTION TYPES	
Multiple choice (One answer)	Yes
Multiple choice (Many answers)	Yes
Dropdown (One answer)	Yes
Dropdown (Many answers)	Yes
Rating Scale	Yes
Star Rating	Yes
NPS (Net Promoter Score)	Yes
Slider Scale	Yes
Ranking	Yes
Boolean	Yes
Matrix Choice (One answer)	Yes
Matrix Choice (Many answer)	Yes
Matrix Rating Scale	Yes

Matrix Star Rating	Yes
Matrix Dropdown	Yes
Matrix Grid	Yes
Image Selection	Yes
MEDIA BASED QUESTION TYPES	
File Upload	Yes
Signature	Yes
QUESTION CUSTOMISATION	
Duplicate Survey Questions	Yes
Mandatory Questions	Yes
Answer Validation	Yes
Set Acceptable Input Formats	Yes
Set Maximum and Minimum Input Values	Yes
Scale Rating Ranges	Yes
Other Choice	Yes
Comments Field	Yes
Question Hint	Yes
Ask for the Respondent's Name	Yes
Add Pictures	Yes
Embed Call Link	Yes
Embed Videos	Yes
Insert Links	Yes
Mark Exclusive Answer Choices	Yes
Question Randomization	Yes
Answer Randomization	Yes
Redirect Links for Pictures	Yes

Upload GIFs	Yes
DIVERSE SURVEY LOGIC	
Question Display Logic	Yes
Page Logic	Yes
Disqualify Respondents	Yes
Prepopulation/Auto Fill	Yes
Piping Logic	Yes
Answer Display Logic	Yes
Custom Script Condition	Yes
DIFFERENT SURVEY PAGES	
Introduction Page	Yes
Terms and Conditions	Yes
Save and Continue Later	Yes
Survey End Page	Yes
Survey Over Quota Page	Yes
Survey Disqualification Page	Yes
Response Editing Restriction Page	Yes
IP Address Restriction Page	Yes
Closed Survey Page	Yes
SURVEY SETTINGS	
Carry Forward Choices	Yes
Scoring	Yes
Custom Variable	Yes
Respondent Variable	Yes
Timer	Yes
Document Merge	Yes

Survey End Page Logic	Yes
SURVEY DESIGN	
Predesigned Themes	Yes
Personalized Themes	Yes
Mobile-Friendly Themes	Yes
Tablet-Friendly Themes	Yes
Survey Font	Yes
Custom Backgrounds	Yes
Colour Schemes	Yes
Header Personalization	Yes
Body Personalization	Yes
Footer Personalization	Yes
Social media Preview	Yes
SURVEY BRANDING	
Survey Design Customization & White Labelling	Yes
Custom End Page	Yes
SURVEY DISTRIBUTION	
Offline Surveys + Kiosk mode	Yes
QR Code for Surveys	Yes
Pop-up surveys in Website	Yes
Embed Survey in Website	Yes
Anonymous Responses	Yes
Email Distribution	Up to 100000/month
SMS Distribution	Yes
Share on Social media	Yes
OFFLINE SURVEY APP	

Offline Survey on iOS and Android	Yes
Kiosk mode	Yes
Print Survey	Yes
AUDIENCE PANEL	
Purchase Responses	Yes
RESPONSE COLLECTION & MANAGEMENT	
IP Address Restriction	Yes
Password protection	Yes
Enable Captcha	Yes
Remove IP address	Yes
Set Survey End Date	Yes
Limit the Number of Responses	Yes
Collectors	Unlimited
Survey Quota	Yes
Collector Quota	Yes
Conditional Quota	Yes
Generate Unique URLs	Yes
Data Collection On Computers	Yes
Data Collection On Tablets	Yes
Data Collection On Mobile Phones	Yes
Reports & Analytics	
Basic	
Survey Completion Time	Yes
Collector Name	Yes
Real-time Responses	Yes
Time Spent by the Respondent	Yes

View IP Addresses	Yes
Delete Responses	Yes
Reporting	
Default Report	Yes
Custom Report	Yes
Trend Report	Yes
Cross-tab Reports	Yes
Summary of Responses	Yes
Individual Responses	Yes
Filters	Yes
Turf Analysis	Yes
Download Charts	Yes
Response Notes	Yes
Response Timeline	Yes
Word Cloud	Yes
Sentiment Analysis	Yes
Classify Responses	Yes
Schedule Reports	Yes
Visualization	
Meter gauge	Yes
NPS Charts	Yes
Pie chart	Yes
Horizontal bar	Yes
Vertical bar	Yes
Line chart	Yes
Arc chart	Yes

Donut chart	Yes
Spider web	Yes
Area chart	Yes
Stacked horizontal bar	Yes
Stacked vertical bar	Yes
Grouped horizontal bar	Yes
Grouped vertical bar	Yes
Longitudinal line	Yes
Longitudinal area	Yes
Longitudinal spline	Yes
Radar chart	Yes
Clustered vertical bar	Yes
Clustered horizontal bar	Yes
Survey Tracking	
Track survey using Google Analytics	Yes
Track survey using Google Tag Manager	Yes
Track survey using Facebook Pixel	Yes
Integrations	
Zoho CRM	Yes
Zoho SalesIQ	Yes
Zoho Recruit	Yes
Zoho Sheet	Yes
Zoho Analytics	Yes
Zoho Campaigns	Yes
Google Sheets	Yes
Microsoft Teams Notification	Yes

Microsoft Power BI	Yes
Zapier	Yes
Slack	Yes
GSuite Marketplace	Yes
MailChimp	Yes
Shopify	Yes
Eventbrite	Yes
Zendesk	Yes
Facebook	Yes
X (formerly Twitter)	Yes
LinkedIn	Yes
Data Transfer	
Export as Spreadsheet	Yes
Export as PDF	Yes
Export as CSV	Yes
Export as Zip	Yes
Export as SPSS	Yes
Export as Tableau Extract	Yes
Export as Image	Yes
Open in Zoho Sheet	Yes
Sharing & Collaboration	
Share Survey	Yes
Using Public link	Yes
Using Private link	Yes
Invite Reviewers	Yes
Share Report	Yes

Share Survey Preview	Yes
Notifications	
Trigger Emails	Yes
Trigger Functions	Yes
Webhooks	Yes
Security and Privacy	
SSL Certification	Yes
HTTPS Encryption	Yes
Hash URLs	Yes
Custom Field Encryption	Yes
User access & Management	
User Management	Yes
Audit logs	Yes
Authentication & Compliance	
Email Authentication	Yes
Sender Email Authentication	Yes
Mark as E-PHI	Yes
Multilingual SSurveys	
Survey Builder in 26 Languages	Yes
Translate Survey in 90+ Languages	Yes

Analytics - Advanced Analytics

Feature	Availability
Essentials	

Records/Rows	5M Rows
Reports & Dashboards	Unlimited
75+ Visualization Options	Yes
Pre-built Reports	Yes
Workspaces	Unlimited
Data Integration & Preparation	
Cloud Drives	Yes
Files & Feeds	Yes
Relational Databases	Yes
Cloud Databases	Yes
Import from Email	Yes
Business Apps Connectors	50+
Import Schedules	Unlimited
Data Refresh Rate	Hourly
Data Snapshots	Yes
Query Tables	Unlimited
Formula Engine	Yes
Advanced Data Preparation	Yes
Business App Connectors	
Sales	Zoho CRM, Zoho SalesIQ, Bigin, Salesforce CRM, Microsoft Dynamics CRM, HubSpot CRM, Exact Online, and more.
Marketing	Zoho Campaigns, Mailchimp, Zoho Survey, SurveyMonkey, Alchemer, Google Analytics, Google Ads, Bing Ads, Facebook Ads, LinkedIn Ads, and Eventbrite.

Finance	Zoho Finance (Books, Invoice, Billing, Inventory, Expense), QuickBooks (Online and Desktop), Xero, and Stripe.
eCommerce	Shopify and WooCommerce.
Project Management	Zoho Projects, Zoho Sprints, Zoho BugTracker, Jira Software Cloud, and Teamwork Projects.
IT & Help Desk	Zoho Desk, Zendesk, Teamwork Desk, ManageEngine ServiceDesk Plus (On-Demand and On-Premise), ManageEngine SupportCenter Plus, and Site24x7.
Social Media	Twitter Analytics, Twitter Competitive Analytics, Facebook Pages, Facebook Competitive Analytics, Instagram, YouTube Channels, and LinkedIn Pages
HR & Recruitment	Zoho People and Zoho Recruit.
Zoho Creator	Yes
Augmented Analytics	
Predictive Analytics	Yes
What-if Analysis	Yes
Auto Analysis	Yes
Conversational Analytics	Yes
Zia Insights	Yes
Data Alerts	30
Collaboration	
Fine-grained access control	Yes
Analytics Portal	Add-on
Make Public	Yes

Private Links	15
Schedule Emails	30
Commenting	Yes
Data Storytelling	Advanced
Large Screen Display	Yes
Mobile Apps	Yes
Governance & Administration	
Data security & Encryption	Yes
Organization Admins	Yes
Workspace Admins	Yes
Groups	Yes
Backup	Yes
Access Logs	Yes

Marketing Automation

Data security & Encryption	
Overall	Yes
Email	Yes
SMS	Yes
E-commerce	Yes
Overall	Yes
Contact Management	
List Management	Yes
Basic Segmentation	Yes

Advanced Segmentation	Yes
Contact scoring	Yes
Tags	Yes
Lead stage (life cycle stage)	Yes
Lead Attribution	Yes
Topics	Yes
Lead Generation	
Sign-up Forms	Yes
POP-UP FORMS (Signup Popups)	Yes
Pop-up Forms (Basic)	Yes
Pop-up Forms (Advanced)	Yes
Landing Pages	
Basic landing page creation	Yes
CRO analytics	Yes
Marketing Channels	
Email Marketing	
Template Layouts (Basic templates)	Yes
Drag-and-Drop Editor	Yes
Template Library	Yes
Upload HTML	Yes
Email Attachments	Yes
Email Polls	Yes
A/B Testing	Yes
Compare Email Campaigns	Yes
E-commerce email campaigns	Yes
Survey Email Campaigns	Yes

Event Email Campaigns	Yes
RSS Campaigns	Yes
Webinar Campaigns	Yes
Email Campaign Reports	Yes
Send follow-up Campaign	Yes
Dynamic content	Yes
Send in Batches	Yes
Send time optimisation	Yes
Timezone based	Yes
SMS Marketing	
SMS Campaigns	Yes
Own SMS gateway	Yes
SMS reporting	Yes
Engagement Pop-ups	
Social Marketing	
Post scheduling	Yes
Twitter	Yes
Facebook	Yes
Instagram	Yes
LinkedIn	Yes
Review social analytics	Yes
ECommerce Marketing	
Shopify	Yes
Woocommerce	Yes
Zoho Commerce	Yes
Product Block	Yes

Recommendation	Yes
Contact and order sync	Yes
Pre-designed newsletter templates	Yes
Pre-designed cart-abandonment reminder templates	Yes
Contact, product, and coupon sync	Yes
Profile- and shopping-history segments	Yes
AI-based product recommendations	Yes
Store's revenue vs. email-based revenue	Yes
Automated purchase follow-ups	Yes
Automated cart-abandonment follow-ups	Yes
Marketing Planner	
Budget Tracking	Yes
Task Collaboration	Yes
Calendar and Scheduling	Yes
Reporting and Analytics	Yes
Web Analytics	
Dashboard	Yes
Behavior	Yes
Acquisition	Yes
Goals	Yes
Smart URL	Yes
Integrations	
APIs	Yes
Webhooks	Yes
Zoho CRM	Yes
Zoho Creator	Yes

Zoho Survey	Yes
Zoho Contacts	Yes
Zoho Bigin	Yes
Zoho Invoice	Yes
Zoho Books	Yes
Zoho Recruit	Yes
Zoho Meeting	Yes
Zoho Commerce	Yes
Zoho Flow	Yes
Zoho Desk	Yes
Zoho Backstage	Yes
SugarCRM	Yes
Salesforce	Yes
G Suite	Yes
Tracking URLs with Google Analytics	Yes
Eventbrite	Yes
SurveyMonkey	Yes
Shopify	Yes
YouTube For video email campaigns	Yes
Vimeo for video email campaigns	Yes
Flickr Add images to the template gallery	Yes
Google Photos Add images to the template gallery	Yes
PayPal	Yes
Litmus	Yes
Giphy	Yes
Zapier	Yes

GoToWebinar	Yes
Evernote	Yes
Dropbox	Yes
OneDrive	Yes
Box	Yes
Unsplash	Yes
Unbounce	Yes
Wistia	Yes
HubSpot	Yes
MS Dynamics 365	Yes
Zendesk	Yes
Settings	
Email Tracking	Yes
Email limits	Yes
Workspace	Yes
Roles and Privileges	Yes
Custom Roles	Yes
Folders	Yes
Opt-in- Confirmation	
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
Design & Customize Opt-in Forms	Yes
Marketing Automation (Journey)	

Triggers	
Form Submission	Yes
List Entry	Yes
Enter a segment	Yes
Criteria Match	Yes
Email Action	Yes
Date field	Yes
Goals achieved	Yes
Page visit	Yes
Lead stage update	Yes
Tag assigned	Yes
Tag removed	Yes
Open trigger	Yes
Abandoned cart	Yes
Purchase follow-up	Yes
Product specific	Yes
Cyclic	Yes
Conditions	
Simple condition	Yes
Multi-way	Yes
Check Email activity	Yes
Check SMS activity	Yes
Action	
Engagement	
Send Email	Yes
Send SMS	Yes

Productivity	
Add to list	Yes
Remove from list	Yes
Topic Management	Yes
Wait Time	Yes
Update lead stage	Yes
Assign tag	Yes
Remove tag	Yes
Update Lead Score	Yes
Update field	Yes
Internal Notification Email	Yes
Wait Condition	Yes
Move to Another Journey	Yes
Remove from Journey	Yes
Webhook	Yes
Action	
Zoho CRM Actions:	
Push Data	Yes
Create Task	Yes
Create Deal	Yes
Others	
Journey Templates	Yes
Journey Path Tracing	Yes
X-RAY	Yes
Re-enrollment	Yes
Response Action Component	
Update field	Yes

Add to list	Yes
Remove from list	Yes
Assign tag	Yes
Remove tag	Yes
Add to Journey	Yes

PageSense

FEATURE	AVAILABILITY
Heatmaps	Yes
Scrollmaps	Yes
Attention maps	Yes
Session recording	Yes
Polls	Yes
Funnel analysis	Yes
A/B testing	Yes
Split URL testing	Yes
Visual editor	Yes
Audience targeting	Yes
Report segmentation	Yes
Revenue analysis	Yes
Real-time reporting	Yes
Role-based access	Yes
Integrations	Yes
Chrome plugin	Yes
URL targeting	Yes

Unlimited experiments	Yes
Unlimited pages	Yes

Webinar

FEATURE	AVAILABILITY
Collaboration features	
Screen/Application sharing	Yes
Annotation	Yes
Computer audio/VoIP	Yes
Webcam sharing	Yes
International dial-in numbers	Yes
Browser based (no downloads required)	Yes
Virtual background	Yes
Custom virtual background	Yes
Emoji reactions	Yes
File management	Yes
Session duration	24 hours
Online meeting features	
Keyboard and mouse sharing	Yes
Personal Room	Yes
Instant chat	Yes
Whiteboard	Yes
Meeting Polls	Yes
Co-host	Yes
Share material	Yes

Pin video	Yes
Remote control	Yes
Scheduling and reminders	
Schedule meeting	Yes
Instant meeting	Yes
RSVP	Yes
Add to calendar	Yes
Reminder setting	Yes
Embed meeting widget	Yes
Moderator controls	
Mute/unmute meeting participants	Yes
Remove meeting participants	Yes
Lock meeting	Yes
Multiple email reminders	Yes
Advanced moderator settings	Yes
Raise hand	Yes
Webinar features	
Scheduling and registrations	
Customize registration form	Yes
Embed registration widget	Yes
Moderate registrations	Yes
Add co-organizers	Multiple co-organizers
Create polls before session	Yes
View and export registration report	Yes
Customize emails	Yes
Multiple email reminder setting	Yes

Automated follow up email configuration	Yes
Post attendee link configuration	Yes
Source tracking	Yes
Domain restriction for registration	Yes
Attendees list configuration	Yes
Attendee engagement and in-session features	
YouTube live streaming	Yes
Upload and share materials	Yes
Create instant polls	Yes
Polls	Yes
Q&A	Yes
Raise hand	Yes
Broadcast message	Yes
Allow attendee to talk	Yes
Make presenter	Yes
Allow anonymous questions	Yes
Chat between organizer and co-organizers	Yes
Post webinar analytics	
Basic reports	Yes
Advanced report	Yes
Recording and storage	
Session recording	Yes
Online storage space	5 GB/host
View and share recording	Yes
Recording transcripts	Yes
Meeting keynotes	Yes

Session recording	Yes
Organization Management	
Co-branding	Yes
Organization level settings	Yes
Multiple portals	Yes
Custom domain	Yes
Automated email settings	Yes
Configure the sender and reply-to email address	Yes
Departments	Yes
Security and compliance	
Two-factor authentication	Yes
Consent for turning on video	Yes
Action log viewer	Yes
Apps and extensions	
Desktop application (Windows, Mac and Linux)	Yes
iOS mobile app	Yes
Android mobile app	Yes
Outlook plugin	Yes
Firefox extension	Yes
Google Chrome extension	Yes
Integrations	
Zoho CRM	Yes
Zoho Projects	Yes
Zoho Calendar	Yes
Zoho Campaigns	Yes
Zoho Bookings	Yes

Zoho Sprints	Yes
Zoho Notebook	Yes
Zoho Connect	Yes
Zoho Backstage	Yes
Zoho Bigin	Yes
Zoho Mail	Yes
Gmail Add-on	Yes
Zoho Marketing Automation	Yes
Zoho Flow	Yes
Zia	Yes
Rev AI	Yes

Backstage

FEATURE	AVAILABILITY
Feature	
Number of events (Free)	Unlimited
Number of attendees	100/event
Portal	
Event days	1/event
Session duration	3 sessions (45 minutes each)
Attendees	100/event
Speakers	3/event
Sponsors	Essential, premium and ultimate add-ons

Booths	Essential, premium and ultimate add-ons
Portal settings	
Data privacy	Yes
Attendee profile management	Yes
Activity log	Yes
Portal-level content library	Yes
Team management	Yes
Custom team roles	Yes
Webhooks	Premium and ultimate add-ons
Branding and customization	
White-labeled event website	Premium and ultimate add-ons
Custom domain mapping	Premium and ultimate add-ons
Event directory	Premium and ultimate add-ons
Virtual Space customizations	Premium and ultimate add-ons
Event calendar widget	Premium and ultimate add-ons
Custom forms	Premium and ultimate add-ons
Agenda builder	
Agenda builder	Yes
Tracks	1
Session duration	3 sessions & 45 minutes each
Host controls	Yes
Bookmarking sessions	Yes
Agenda export and import	Yes
Event cloning	Premium and ultimate add-ons
Event visibility settings	Yes
Event Ticketing	

Ticket classes	1
Paid ticketing	Essential, premium and ultimate add-ons
Commission-free event ticketing	Essential, premium and ultimate add-ons
Custom registration form	Premium and ultimate add-ons
Promotional codes	Essential, premium and ultimate add-ons
Pre-approval of ticket orders	Premium and ultimate add-ons
Registrations import and export	Yes
Badge designer	Yes
Event website	
Website builder	Yes
Website themes/templates	Yes
Website language	1 language
Website customizations	Essential, premium and ultimate add-ons
Custom logo and favicon	Essential, premium and ultimate add-ons
Custom sections	Essential, premium and ultimate add-ons
Custom event pages	Premium and ultimate add-ons
Cookie management	Yes
Sponsors and exhibitors	
Sponsorship management	Add On
Exhibitor management	Add On
Customizable virtual booths	Add On
Sponsor/Exhibitor showcase	Add On
Exhibitor to attendee meetings	Add On

Lead management for exhibitors	Add On
Event marketing	
Scheduled emails	Essential, premium and ultimate add-ons
Automated emails	Yes
Customizable banners	Essential, premium and ultimate add-ons
Social share banners	Essential, premium and ultimate add-ons
Affiliate marketing	Essential, premium and ultimate add-ons
Event networking and engagement	
Private & group chat	Essential, premium and ultimate add-ons
1-on-1 meetings	Ultimate add-on
Lounges	1/event
Discussion channels	Premium and ultimate add-ons
Handouts	Essential, premium and ultimate add-ons
Live polling	Yes
Live Q&A	Yes
Event gallery	Essential, premium and ultimate add-ons
Announcements	Essential, premium and ultimate add-ons
Session feedback form	Essential, premium and ultimate add-ons
Session recordings	Premium and ultimate add-ons
Event analytics	
Event dashboard	Yes

Ticket sales analytics	Essential, premium and ultimate add-ons
Attendee analytics	Yes
Session analytics	Yes
Exhibitor analytics	Add On
Webcasting services	
Backstage OnAir	Yes
Third-party webcast services	Yes
Mobile apps	
Attendee mobile app—Android and iOS	Yes
Organizer mobile app—Android and iOS	Yes
White-labeled mobile app for attendees - Android and iOS	Ultimate add-ons
Integrations	
Google Analytics	Essential, premium and ultimate add-ons
Zoho CRM	Add On
Zoho PageSense	Add On
Zoho SalesIQ	Add On
Zoho Meeting	Essential, premium and ultimate add-ons
Zoom (Webinar and Meeting)	Essential, premium and ultimate add-ons

Workdrive

FEATURE	AVAILABILITY
Built-in document editors	
Writer	Yes
Sheet	Yes
Show	Yes
Supported Files	
Preview 220+ file formats	Yes
Convert files to Zoho format	Yes
File Size	1 GB
Data Encryption	Yes
Sharing	
Individual collaborators	Yes
Anyone in your team	Yes
Anyone on the internet	Yes
Record or entity based permission	Yes

Cliq

Messaging	
Unlimited 1-1 chats and group chats	Yes
Participants per group	100
Read receipts	Yes
Searchable messages	10000
@mentions and #tags	Yes

Star important messages	Yes
Maximum duration for audio/video messages and screen recordings	5 mins
Link preview	Yes
Print chat transcript	Yes
Collaboration	
Unified org directory	Basic
Reminders	Yes
Zia events	Yes
Remote work	Yes
Calendar events	Yes
Channels	
Organization & personal channels	Yes
Announcement channels	Yes
Archiving channels	Yes
Participants per channel (Organization, team, & personal)	100
Threads	Yes
Calls and meetings	
1-1 audio & video calls	Yes
Screen sharing	Yes
Audio & video meetings	Up to 100 participants
Maximum meeting duration	60 mins
Add guests to meetings	Yes
Security and privacy	
Single SSO sign-on & Google sign-on	Yes
Two factor authentication	Yes

Password policies	Yes
Restricted IP	Yes
Data encryption both in transit and at rest	Yes
SSL support	Yes
Consents	Yes
Admin panel	
User provisioning & de-provisioning	Yes
Departments & designations	Yes
Availability reports	Yes
Chat export	Yes
Import	Yes
User preferences	
Desktop notifications	Yes
Themes	Yes
Email & sound notifications	Yes
Integrations	
Integration with other Zoho apps	Yes
Extensions	10 per organization
Developer platform	
API support	Yes
Slash commands	100 per organization
Message actions	100 per organization
Bots	100 per organization
Functions	100 per organization
Schedulers	50 per organization
Databases	50 per organization

Database records	1,000 per organization
Widgets	25 per organization
Internal apps	100

CRM Plus Add-Ons

FEATURE	AVAILABILITY
Support	
Premium support - Billed Monthly	Premium support - \$13.8 /user/month, Enterprise support - \$17.25 /user/month
CRM File Storage	
CRM File Storage - Billed Monthly	Starts from \$5.75 /5 GB/month
SalesIQ - Visitors	
Billed Monthly	Starts from \$25 /25,000 Visitors/month
Campaigns - Contacts	
Billed Monthly	Starts from \$6 /500 Contacts/month
Social - Brand	
Billed Monthly	Starts from \$23/ Brand/month
Survey - Responses	
Billed Monthly	Starts from \$6 /100 Responses/month

Analytics - Rows	
Billed Monthly	Starts from \$10 /100,000 Rows/month
Projects and Desk - Lite users	Free for 25 Lite Users \$10 /user/month or \$120 /user/year for every additional

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