



SOFTWARE THAT WORKS THE WAY YOU DO

Zoho's configurations and customizations help you adapt your CRM to the way your team works. Control how information passes through your pipeline with custom layouts, automations, modules, and fields. Pick and choose the features you need most with native and third-party apps available through the Zoho Marketplace. Your CRM should be as flexible and dynamic as your business demands: Ours is.

CUSTOMIZE YOUR MODULES

Modules are designed to help you organize subsets of information. Zoho CRM comes with 15 standard modules to serve your sales and marketing needs. For a personalized CRM, add custom modules to narrow in on what matters for your industry.



A LAYOUT FOR EVERY PROCESS

Manage sales for multiple products, geographies, or processes from one CRM system. Page layouts help your sales representatives view and access personalized data, and create workflows to function independently. With fields, links, and buttons, you get everything you need to design your own layouts for each new process.

Create the perfect Zoho CRM for your unique business needs with:

- Custom modules
- Custom functions
- Territory management
- Plugins marketplace
- Platform for verticals
- Office 365 integration
- Third-party app integration
- Custom apps
- Google apps integration
- Zoho apps integration
- Developer AP



TRIGGER CUSTOM ACTIONS

Add custom buttons for your most frequently recurring processes. For instance, include a button in your deals module and quickly mark customer payments as monthly, annual, or one-time only. Create shortcuts to display the details of an account, send a survey, or access a list of invoices.



GET THE RIGHT INFORMATION IN THE RIGHT PLACE

Customize the information you want to see inside your CRM. Write your own functions to generate related lists that fetch relevant information about your leads, deals, or contacts. Get an overview of everything that has been happening with them so you can refine your pitch.

Zoho CRM functionality:

- Multichannel communication
- Sales productivity
- Team management
- Sales force automation
- Extend and customize
- Data security

75% of companies agree that their business would be stronger if they could harness all their data.

- **CompTIA (2015)**



CUSTOM APPLICATIONS FOR ANY PROCESS

One size doesn't fit all. Many industries require special apps that can communicate with core CRM modules to improve their business's efficiency. Zoho Creator allows you to build custom apps with an intuitive drag-and-drop interface and integrate them with CRM.



EXTEND YOUR CRM

Your business needs more than just sales automation to manage all of its activities. You might use different applications for everything, from accounting and analytics to email and event management. Zoho CRM's integrations let you collaborate, communicate, and share information with hundreds of external apps.

Get all the benefits of Google Apps, Office 365, Zoho Apps, third-party extensions, or your own in-house applications, all from inside your CRM.

Customer testimonials:

“ I like the ability to customize the various fields and that I needed little guidance to get started, whereas the six other CRMs I tried were a lot less intuitive and basic to move or change.

Carmel Royston
Business Developer at Core-Digital Everything

“ Our company/team is very unique...so being able to modify and create the platform to conform to our needs was awesome.

Greg Zwelacker
Co-owner at Zweleker & Associates

