

Customizing and Integrating

ZOHO CRM

The Essential Guide

What's in this Guide

This guide is meant to help business who are using Zoho CRM software, specifically around implementing, customizing and [integrating Zoho CRM](#).

Regardless of whether you're a small business implementing Zoho CRM for the first time, or a business who has been using Zoho CRM already and is looking to get more out of the system – this guide is meant to review how to enhance your company's usage of Zoho CRM, specifically in terms of customizing and integrating the system.

Some topics we'll cover in this guide include:

System Design: How easy is the system to use for your company's users? What are the best features of this system, how do they work and what can they do for your team?

The Data Model: How are the system objects setup? How will data flow between those objects? Will this setup work for your business?

Customization: We will look at custom fields and custom objects in Zoho CRM, as well as customizing layouts.

Integration and APIs: Does the system have an API and how easy is it to use? Do out of the box integrations exist?

Automation: Automation refers specifically to lead assignment and workflow rules. We'll review these capabilities and focus on ease of use of these features.

Pricing and Scalability: We'll review the pricing and editions of Zoho CRM, including the flexibility you get and the pros and cons of certain editions.

Mobile: Short review of available mobile applications on both Android and iOS platforms.

Overall: Bottom line: how good of a system is this for your business and should you go through with the purchase of this CRM system?

Introduction to Zoho CRM



Introducing Zoho CRM Plus

Engage the right prospects, sell smarter and retain more customers. Zoho CRM Plus helps you across your customer lifecycle, so your business can be truly customer-centric.

[GET STARTED](#)

Zoho CRM is one of the many product offerings that Zoho has. The company has focused on building out a suite of cloud apps that includes office applications, a reporting application and a fully baked CRM that rivals some of the top systems on the market today.

Zoho CRM is a great alternative to Salesforce.com, especially for small to medium sized businesses with growing sales teams.

Zoho CRM uses a traditional CRM data model: Leads -> Contacts, Accounts and Opportunities. Opportunities are called "Potentials" in Zoho, which will catch you off guard if you're used to another system.

Leads in Zoho are assigned to sales reps manually or via automated lead assignment rules, then are qualified and converted into contacts, which are associated with accounts and potentials (see the diagram on page 5).

Zoho CRM is also affordable (much more so than Salesforce.com): you can get onto Zoho CRM with a small team for free, though the features will be limited. From our research in using Zoho CRM at Bedrock Data, the Professional plan offered the most bang for your company's buck.



Ease of Use and System Design

Zoho CRM is very straight-forward and easy to use. The system design is very similar to its competing CRMs (Dynamics, Salesforce.com, Sugar, etc...). We gave Zoho high marks for usability and speed, mainly based on the asynchronous nature of the front end (it will remind you of Gmail in that way). It's fast and very stable – we hardly noticed a single issue with the front-end, so usability is good.

The design of the product has also changed a good deal over the last few years, but has found a place that makes it easy to use and administer. There's a reason that our sales reps can essentially administer Zoho CRM without help from someone more technical: it's intuitive and things are easy to find in the Admin area of the system.

Our reps used Zoho CRM for a few months or more and found it to be a great system, with very few issues. The system is easy to navigate (once you get used to the "potentials" naming convention), the search functionality in the system is excellent.

Customizing views and layouts are easy as well, though our reps found themselves wishing that they could each configure their field layouts a bit differently.

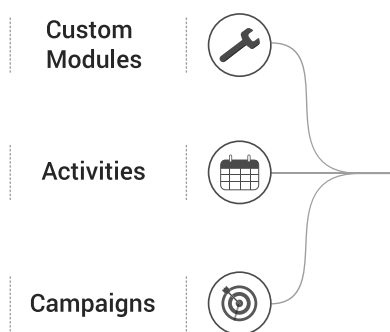
The Zoho CRM Data Model



Sales records start as leads in Zoho. **Leads** are people and are sales leads, either qualified or un-qualified.

Leads are assigned to sales reps via automated Assignment Rules. If qualified, leads are then converted into **Contacts** and associated with an **Account**.

Contacts are associated with **Accounts**, which are companies. **Potentials**, which represent “deals,” or pieces of business are also associated with **Accounts**, and therefore have contacts linked to them as well. A “closed/won” deal is used to mark a customer.



Other “child” entities such as **Activities**, **Campaigns** and any **Custom Modules (Objects)** that you create can be added to Zoho and tracked over the lifetime of a record in the system.

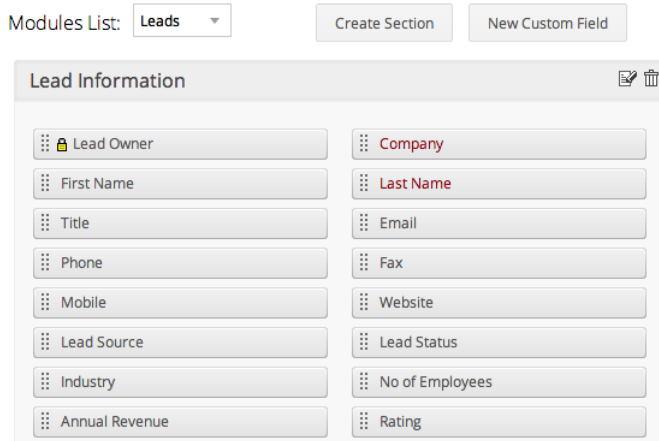
Customization

Custom Fields

Adding custom fields to Zoho CRM is really easy. You can do so under the “Admin > Customization > Fields” section of Zoho CRM. The “Customization” section of the Zoho CRM Admin area is also where you will find layouts, links and other items. Note that custom fields are not available in the Free version of Zoho CRM.

Leads : Edit Page Layout

Customize the page layout by changing the order of the columns and fields, marking fields as ma drag and drop the section header to reorder the sections. You need to drag and drop the fields to

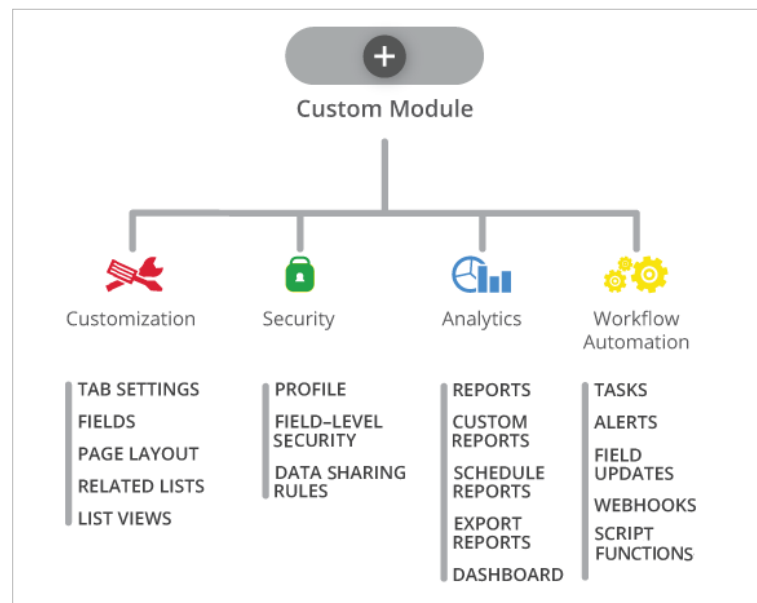


Custom Objects

Custom modules in Zoho CRM are only available in the Enterprise version. You can create your own custom modules that can represent different pieces of your business. For instance, if you offer consulting services on top of your products, you could create a separate “service” module, and relate that to an account (or perhaps a separate “customer” module?). You can treat custom modules just like standard modules.

Layouts

Layouts enable you to add your fields to the screen for your Zoho users to see. Zoho provides an easy to use screen that enables you to drag and drop fields in order to add and remove fields to the layouts for all of your Zoho objects. You can also easily add sections to your layouts to make sure that you keep your data organized. This is really easy to use – just don’t forget to hit the “Save” button when you’re done!! This bit us a few times while setting up the system.



Automation

Zoho automation features allow you to setup rules that move and manipulate data in the CRM. They are most popular for doing lead assignment, as well as setting up workflows.

Lead Assignment

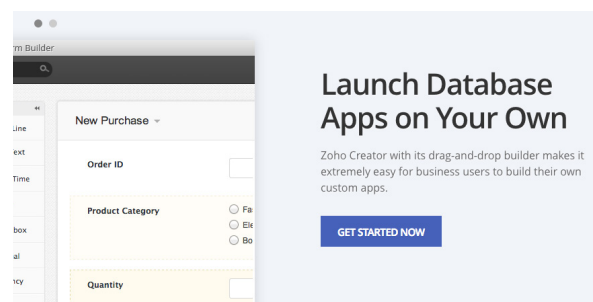
Lead assignment in Zoho is used to assign records (primarily leads) to users. A lead assignment rule looks at a specific set of criteria on a lead in Zoho, and if the criteria evaluates to “true” on a particular lead, then that lead will get assigned to either a particular user, role or to a defined round robin, which is a “random” assignment to either a defined set of users or roles.

Workflows

Zoho's Standard, Professional and Enterprise editions enable you to create workflows in the system for as little as \$12/user/month. These are fairly standard workflow rules that you'll find in other systems like Sugar and Salesforce.com with triggers, alerts and actions. Certain advanced functionality like webhooks (which allow you to push data from Zoho to you) and field updates (as an action) are reserved for the Professional and Enterprise editions only.

Webhooks

Webhooks allow Zoho to send data to an endpoint URL that you configure on your site in order to receive automated pushes of data from the system. Webhooks are useful for integrations and other data manipulations. Once you configure a webhook in Zoho, you can associate it with a workflow rule to actually make sure that it gets sent out appropriately.



BONUS FEATURES

Zoho Creator and Deluge Script

Zoho's answer to Salesforce's APEX scripting language and the ultimate customization feature for any CRM: the ability to write code. In Zoho's case, you can actually drag and drop code blocks directly against the object data within the system itself. This lets you really create your own rules and automation for any Zoho data in the CRM. There are some prerequisites to using **deluge script** though: you have to have access to CRM Enterprise edition, plus another subscription to Zoho creator, but these run fairly cheap (minimum \$25/month).

Integrations and APIs

Zoho's APIs are one of the only pain points of the system. Zoho has baked their API limits into their pricing model, and the result is severely limited API calls per day, depending on the version of Zoho CRM that you're using.

Zoho Free gives you 250 API calls/day, and it goes up from there, but just slightly, increasing based on your plan and the number of users that you have using Zoho (more on pricing on the next page).

[Check out Zoho API Limits here.](#)

This is problematic if you're writing your own Zoho integration, because it means more engineering time to make sure that you're using your API calls appropriately.

Of course there are platforms that make integrating Zoho CRM easier by using the right amount of calls for your account.

Integration platforms also can be affordable while still providing powerful Zoho integrations. [Bedrock Data](#) for instance gives you a Zoho integration where all main objects (lead, contacts, accounts, potentials, invoices, etc...) are integrated - From \$99/month, self signup and administration.

Other integration options are available to you on Zoho's integrations page, which you can [find here.](#)

Pricing and Scalability

Zoho's pricing is affordable for the type of system that you get, which can go a long way for a moderately sized sales team:

<p>ZOHO FREE PLAN</p> <p>3 users 5,000 record limit 250 API calls/day</p> <p>FREE</p>	<p>ZOHO STANDARD PLAN</p> <p>100K record limit 250 API calls/day</p> <p>\$12 user/month</p>	<p>ZOHO PROFESSIONAL PLAN</p> <p>Unlimited Records Automation 250 API calls/user/day</p> <p>\$20 user/month</p>	<p>ZOHO ENTERPRISE PLAN</p> <p>Unlimited records Full Automation Suite 500 API calls/user/day</p> <p>\$35 user/month</p>
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Zoho is cheap enough that, for many sales organizations considering it, the Enterprise package is probably the best option. Zoho's pricing will also allow you to scale with the product, as will many of the features that you'll find in the Enterprise product.

As a comparison, these price points are a whole lot lower than SugarCRM and especially Salesforce.com, but again the API limits may be a damper on how far Zoho will scale for your business.

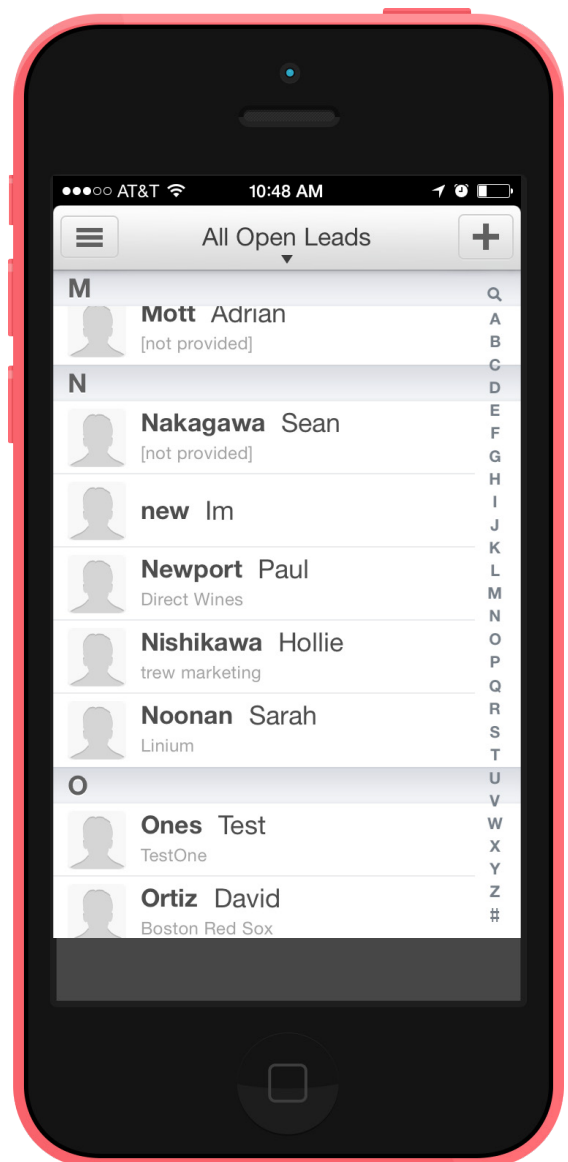
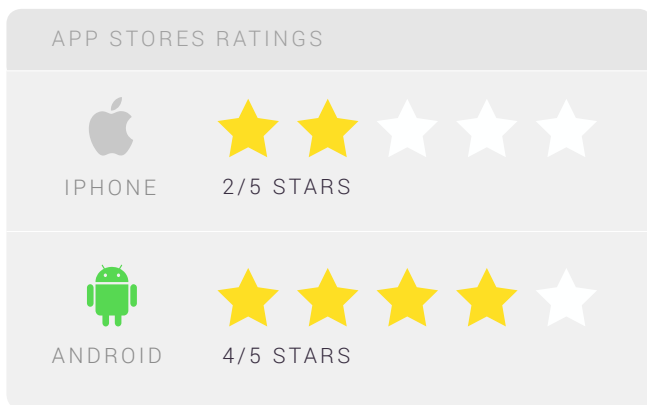
Zoho CRM Mobile App

Zoho has an iOS and Android app that are both useful, but not awesome. Like many CRM mobile applications, you really lose a lot of the functionality that comes with screen real estate when going from a web app to a mobile app.

The app allows you to make instant calls to your leads through the mobile app, which is nice, but there isn't a whole lot of other usefulness with Zoho's iPhone app at this point, besides lead tracking, calling and emailing.

You can create new records on top level entities (objects) like leads, contacts, potentials, (support) cases and accounts. You can also edit essentially any record and make changes across the board.

It is interesting to note that the Android app has much better ratings than the iPhone app at the time of this writing (October 2014). We weren't surprised by this, as we found a number of stability issues with the iPhone version – it crashed on us a number of times when reviewing the app.



✓ Overall Takeaways

We like Zoho CRM as an alternative to other comparable CRMs for small, growing businesses who may not want to spend the money on a system like Salesforce or Microsoft Dynamics CRM.

The real downside to Zoho is the API limits, which does hinder the scalability of the product, especially for high growth and larger companies.

If you fit into this category, then Zoho probably isn't the best fit for you at this time, because you will need to integrate data into and out of Zoho CRM.

That said, like SugarCRM and Dynamics CRM, there really isn't much that you can't do with Zoho that you can with, say, Salesforce.com – that's no joke.

Features like custom modules (objects), Deluge Script and the mobile app make Zoho a great CRM option at a reduced cost.

