



# Why Choose Zoho CRM over MS Dynamics

Zoho CRM is an all-inclusive solution for every type of business vertical. We provide a user-friendly interface, with tools for sales, customer relations, marketing, analytics, and more. Avoid complex plans, confusing packaging, and complicated licensing. Zoho CRM offers simple subscription plans and a host of features for a fraction of the price you would pay elsewhere.

You can get premium solutions at Zoho without having to pay premium prices. Zoho CRM offers optimized solutions for businesses big and small, and is continuously improving. Below, you'll find a comprehensive overview of Zoho CRM's features, and how we compare with Microsoft Dynamics CRM.



When we originally planned to migrate all of our data from MS DynamicsCRM to Zoho CRM, the task seemed extremely daunting. With numerous pieces that needed to fit perfectly into our new CRM to make the migration successful, it was also essential we get it right the first time. Zoho provided us with detailed instruction on how we could make this process go smoothly and with ease. Since using the Zoho CRM, we have seen better internal workflows as the system is extremely user-friendly and capable of fulfilling our company needs.



**Amber Mowery**  
Marketing Analyst at Avreo Inc.



# Zoho CRM vs MS Dynamics

## Edition Comparison

FEATURE	ZOHO ENTERPRISE	MS Dynamics 365 Plan
Pricing	\$35 Per user/month billed annually \$45 month-to-month	\$25/per month only annual pricing- Upto 5 Users
Maximum no.of users	No upper limit	20 Minimum Subscriptions
Data storage (leads, contacts, etc.)	Unlimited	10 GB for 20 Users initially and 5GB for every additional 20 users added
File storage (DOC, PDF, etc.)	1 GB/org + 1GB/user	100 GB /Org or per 20 users
Technical support	✓	✓
Premium Support	✓ ( 10 users annual contract, 20% of license fee )	✓ (Premier Support / Depends on the subscription plan)
<b>Sales force automation</b>		
Leads	✓	✓
Accounts	✓	✓
Contacts	✓	✓
Opportunities	✓	-
Tasks, log a call,calendar, and notes	✓	✓

FEATURE	ZOHO ENTERPRISE	MS Dynamics 365 Plan
Feeds – Team collaboration	✓	✓
CRM views	✓	✓
BluePrint	200 bp/module	200/Org
SalesSignals	✓	-
Advanced filters	✓	✓
Macros	✓	✓
Scoring Rules	30/module	-
Sales forecasts	✓	✓
GameScope	✓	-
BCC dropbox for email	✓	-
Calendar sync via CalDAV	✓	-
<b>Social</b>		
User level integration (Fb, Twitter)	✓	Partially
Social tab (Fb, Twitter & Google plus)	✓	Partially
Social interactions with leads / contacts	✓	-
Capture Leads from Fb, Twitter	✓	Partially
<b>Artificial Intelligence</b>		
Lead and Deal prediction	✓	Partially
Email Sentiment	-	-

FEATURE	ZOHO ENTERPRISE	MS Dynamics 365 Plan
Best time to contact	✓	-
Zia Reminder ( based on Best time to contact)	✓	-
Lead Enrichment	Y(extension \$)	-
Zia Voice	10	-
<b>Marketing Automation</b>		
Web to lead capture	✓	Not specified
Website visitor tracking	\$	Not specified
Campaigns	✓	Y(\$)
Email insights	✓	Not specified
Email templates (HTML/Plain-text)	Unlimited	Only Customize
Mass email	1000/day	Not specified
Auto responders	3	Y
Integration with Google AdWords	✓	Y(\$)
<b>Document Management</b>		
Documents Storage ( Max storage - 5GB)	✓	On Hard disk
Data backup	2 data backups/month (\$10/request)	Not Specified
Notes & file attachment	✓	✓
Folders search	✓	✓

FEATURE	ZOHO ENTERPRISE	MS Dynamics 365 Plan
<b>Customer support</b>		
Cases	✓	✓
Case assignment rules	20 rules and 50 rule entries	✓
Case escalation rules	✓	✓
Solutions (knowledge base)	✓	✓
<b>User Portal</b>		
Portals	✓ ( First portal user type creation is free and upto 10k client users can be invited for free Creation of more than one portal user type will include pricing)	✓ (Users also require a License)
<b>Inventory Management</b>		
Inventory Management	✓	✓
Sales quotes	✓	✓
Sales orders	✓	✓
Purchase orders	✓	-
Invoices	✓	✓
Products	✓	✓
Price books	✓	✓
Vendors	✓	✓
Integrated procurement & fulfillment	✓	✓

FEATURE	ZOHO ENTERPRISE	MS Dynamics 365 Plan
<b>CRM analytics</b>		
Standard reports	✓	✓
Custom Reports	Unlimited	✓
Standard dashboards	✓	✓
Customizable dashboards	Unlimited	✓
Report scheduler	20 schedulers/user Maximum 100 schedulers/day for Org.	✓
Anomaly Detection ( Powered by Zia )	10 Detector	✓
CRM analytics	✓	✓
<b>Product Customization</b>		
Home page customization	✓	✓
List View Customization	✓	✓
Page layouts	3/module	✓
Layout Rules ( conditional layouts)	10/layout	✓
Validation Rules	10 rules/layout	-
Sub Forms	✓	✓
Translation Bench	✓	-
Layout editor	✓	✓
Rename tabs	✓	✓

FEATURE	ZOHO ENTERPRISE	MS Dynamics 365 Plan
Multi select lookup	2/module	✓
Copy customization	✓	✓
Custom fields	302 fields/module (Note: Activities module has only 230 fields)	✓
Custom formula fields	15 fields/module	✓
Custom links	10 links/module	✓
Custom modules	50	✓
Custom buttons	50	✓
Custom related lists	5/module	-
Tab groups	25	-
Web tabs	25	-
<b>Security administration</b>		
Profiles	25	✓
Roles	250	✓
Field-level security	✓	✓
Data Sharing Rules	15	✓
Group-level security	-	✓
Record level sharing	✓	✓
Territory Management	150	✓

FEATURE	ZOHO ENTERPRISE	MS Dynamics 365 Plan
Data Security by Encryption ( EAR)	5	✓
<b>CRM Analytics</b>		
Chart	✓	✓
KPI	✓	✓
Funnel	✓	✓
Target	✓	✓
Comparator	✓	✓
Anomaly Detection ( Powered by Zia )	10 Trends	✓
<b>Workflow Management</b>		
Workflow rules	50 conditions/module 50 entries/module	10/Org
Workflow alerts (No. of Users * 100) or 5000 Emails per day depending on the lower limit.)	5 emails/action	-
Workflow tasks	5 tasks/action	✓
Workflow field updates	3 field updates/ action	-
Workflow approval	10	✓
Workflow Insights	✓	✓
Workflow Multiple Condition	10 conditions/rule	✓



FEATURE	ZOHO ENTERPRISE	MS Dynamics 365 Plan
Webhooks	1/action 20000 calls/day or 500 calls per user license for the org. (whichever is lower)	✓
Schedules	5/ workflow rule	✓
Time-based actions	5/rule	-
Custom function via Deluge script	1 Instant Action and 5 Scheduled Actions per Rule	-
<b>Mobile</b>		
iOS	✓	✓
Android	✓	✓
Mobile SDK	✓	✓
<b>Globalization</b>		
Multi-currency	✓	✓
Multi-language support	✓	✓
Time zone	✓	✓
Number, date, and calendar formats	✓	✓
<b>Add-ons &amp; Integrations</b>		
Plug-in for Microsoft Outlook	✓	✓
Plug-in for Microsoft Office	✓	✓











FEATURE	ZOHO ENTERPRISE	MS Dynamics 365 Plan
Office 365 Integration	✓	-
Email integration (POP/IMAP)	✓	✓
Gmail integration	✓	\$
Google apps integration	✓	✓
Slack Integration	✓	-
CTI- Hosted PBX systems	✓	\$
CTI- On-Premise PBX systems	✓	\$
<b>Developers</b>		
Catalyst	✓	-
Web services api	Max: 25000 calls/day Min: 4000 calls/day	-
Third-party Applications Integration	✓	✓

\$ Indicates that the feature is available as a paid add-on.

- Indicates the feature isn't available in this version.

✓ Indicates the feature is available in this paid plan.

## Sales Enquiries

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