

zen
shareSuite

ZENCRM Business Line Features

ZenCRM

Author: Interzen

SYSTEM FEATURES	MARKETING EDITION	SALES EDITION	PRO EDITION	ADVANCED EDITION
Interactive Charts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Multilingual	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Notification emails for deadlines and events	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Role management	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
User permission management	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Administrator settings management	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
User Settings Management	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Access security control	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Leads, Contacts and Accounts import tool	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Document Management	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Data export tool	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

KEY FEATURES	MARKETING EDITION	SALES EDITION	PRO EDITION	ADVANCED EDITION
Integration with customer information systems	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cloud mode	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Possibility of installation at the customer's server farm	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Access from mobile devices	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Compatibility for international contexts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
High usability	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Proprietary source code	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

CONTACT MANAGEMENT FEATURES	MARKETING EDITION	SALES EDITION	PRO EDITION	ADVANCED EDITION
Lead Management	✓	✓	✓	✓
Account Management	✓	✓	✓	✓
Tree view for Enterprise groups	✓	✓	✓	✓
Contact management	✓	✓	✓	✓
Customer/prospect activity history	✓	✓	✓	✓
Contact activity history	✓	✓	✓	✓
Activity management (calls, meetings, commitments)	✓	✓	✓	✓
Agenda management (calendar view and list view)	✓	✓	✓	✓
Synchronization of CRM contacts with smartphones and tablets (CardDAV)	✓	✓	✓	✓
Agenda synchronization with smartphones and tablets (CalDAV)	✓	✓	✓	✓

MARKETING MANAGEMENT FEATURES	MARKETING EDITION	SALES EDITION	PRO EDITION	ADVANCED EDITION
Lead Geolocation	✓	✗	✓	✓
Email campaign management	✓	✗	✓	✓
Target list management	✓	✗	✓	✓
Web-to-lead form management	✓	✗	✓	✓
Automatic Marketing Management	✓	✗	✓	✓
Web Visit Tracking	✓	✗	✓	✓
Product management	✓	✗	✓	✓
Price list management	✓	✗	✓	✓
Lead Score	✓	✗	✓	✓

SALES MANAGEMENT FEATURES	MARKETING EDITION	SALES EDITION	PRO EDITION	ADVANCED EDITION
Lead-to-contact conversion management	✘	✔	✔	✔
Geolocation Accounts	✘	✔	✔	✔
Contact management	✘	✔	✔	✔
Contacts geolocation	✘	✔	✔	✔
Cronology of activities on contacts	✘	✔	✔	✔
Visit report	✘	✔	✔	✔
Opportunity management	✘	✔	✔	✔
CPQ - Cost Price & Quote	✘	✔	✔	✔
Economic proposal template management	✘	✔	✔	✔
Sample management	✘	✔	✔	✔
Competitor management	✘	✔	✔	✔
Automatic archiving of incoming and outgoing emails	✘	✔	✔	✔

POST SALES MANAGEMENT FEATURES	MARKETING EDITION	SALES EDITION	PRO EDITION	ADVANCED EDITION
Case management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
OTRS Integration (Ticketing)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

ADMINISTRATION MANAGEMENT FEATURES	MARKETING EDITION	SALES EDITION	PRO EDITION	ADVANCED EDITION
Contract management	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Invoice management	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Management of converting opportunities into contracts	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Management of conversion from Prospect to customer	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Order management	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contract management	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

GDPR AND PRIVACY FEATURES	MARKETING EDITION	SALES EDITION	PRO EDITION	ADVANCED EDITION
Differentiated management of the areas of consent to the processing of personal data in leads and contacts	✓	✓	✓	✓
Search filters for leads and contacts based on areas of consent to the processing of personal data	✓	✓	✓	✓
Management of expired consent to the processing of personal data through anonymisation/cancellation	✓	✓	✓	✓
Web page for the independent management of one's consent to the processing of personal data	✓	✓	✓	✓
Web-to-lead form with integrated management of the areas of consent to the processing of personal data	✓	✗	✓	✓
GDPR Settings panel with the configurations required by the new European legislation	✓	✓	✓	✓
New security policy structured on multiple levels active in both system and application fields	✓	✓	✓	✓

DASHBOARD FEATURES AND CHARTS	MARKETING EDITION	SALES EDITION	PRO EDITION	ADVANCED EDITION
Pipeline Management (Enterprise level)	✘	✔	✔	✔
Revenue Breakdown Charts (Enterprise Level)	✘	✔	✔	✔
ABC customer analysis (Enterprise level)	✘	✔	✔	✔
My top 10 clients	✘	✔	✔	✔
Charts for measuring marketing results	✔	✘	✔	✔
Operational home page with icon view	✔	✔	✔	✔
Opportunity dashboard by sales stages	✘	✔	✔	✔
Dashboard of opportunities by month	✘	✔	✔	✔
My top 5 clients	✘	✔	✔	✔
Conversion rate of opportunities into contracts	✘	✔	✔	✔
Analysis of contracts concluded by product category	✘	✔	✔	✔

THANK YOU

FOR YOUR KIND ATTENTION

ANY QUESTIONS?