

Zoho CRM vs Odoo CRM

A Feature-by-Feature Comparison

A factual, function-by-function comparison of Zoho CRM and Odoo CRM: what each does, what it costs to make it do what a business needs, and what users report from using it.

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October 2026

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Purpose and Scope

This document compares Zoho CRM and Odoo CRM function by function. It is written for business owners and managers who need to understand what each CRM does, what it costs to make it do what their business needs, and where each one has fitted, or not fitted, the businesses that use it.

The comparison is limited to CRM: capturing and managing leads, managing opportunities, communicating with prospects and customers, quoting, and reporting on sales. Accounting, stock, HR and payroll are mentioned only where the CRM hands work to them, and are not compared.

Prices and examples assume a South African business with 10 to 50 users. Product versions are Zoho CRM as sold in 2026 and Odoo 18 and 19.

How capabilities are described

Every capability in this document is placed in one of seven categories. The same categories are applied to both products.

Category	Meaning
Included	Works in the stated edition or plan, using normal settings
Included, configured	Uses tools within the same licence, but must be set up (for example an automation rule)
Higher edition / plan	Available only at a higher, more expensive edition or plan, which is named
Usage charge	Included functionality that is billed per use, such as credits or per-message fees
Separate product	Requires another product from the same vendor, with its own licence
Third-party	Requires a product or module from another vendor
Not available	No route exists in either the product or its standard add-ons

A note on the word "Enterprise"

The word means different things for the two vendors. **Zoho CRM Enterprise** is one of Zoho CRM's five editions. **Odoo Enterprise** is the paid version of Odoo, sold on the Standard and Custom plans, as opposed to the free Community edition. This document always uses the full name to avoid confusion. A glossary of other terms is at the end of the document.

1. Summary

Zoho CRM is a dedicated CRM. Other business functions, such as live chat, helpdesk, email marketing and accounting, are separate Zoho products, each with its own licence and its own database, connected to the CRM by integration. Zoho also sells two bundles, Zoho CRM Plus and Zoho One, which combine many of these products at one price.

Odoo is one business system in which CRM is one application. On the paid plans, one per-user licence covers all Odoo applications, including live chat, helpdesk, email marketing, quoting and invoicing, all in one database. Some Odoo services are billed by usage, and some capabilities require Odoo's more expensive Custom plan.

Zoho CRM

- Dedicated CRM, hosted by Zoho only; South African customers are currently served from Zoho's European or US data centres
- Five editions: Free (up to 3 users), Standard, Professional, Enterprise and Ultimate; many sales features are available only from Professional or Enterprise
- Includes a visual process designer (Blueprint) that controls how deals move between stages, from Professional edition
- Includes automated follow-up sequences (Cadences) and territory management, from Enterprise edition
- Website chat, helpdesk, email marketing and accounting are separate Zoho products
- Billed in rand for South African customers

Odoo CRM

- CRM application within Odoo; one database shared with sales, invoicing, inventory, helpdesk and marketing
- Available as Odoo Online, Odoo.sh, or self-hosted; free Community edition or paid Standard and Custom plans
- Opportunities convert directly into quotations, sales orders and invoices on the same record
- Website chat, helpdesk, email marketing, VoIP and WhatsApp messaging are included in the paid plans
- No visual stage-control designer, no automated sales follow-up sequences, and no territory model
- Studio (no-code customisation), multi-company and external API access require the Custom plan
- Billed in US dollars for South African customers

Key difference: Zoho CRM provides more sales-specific tools within the CRM itself, with other functions bought as separate products. Odoo provides fewer sales-specific tools, with the functions around the sale included in the same licence and database.

2. Products and Charges Referenced

2.1 Zoho products named in this document

Product	What it does	Price (USD per user per month, annual billing)
Zoho CRM	The CRM	Free (3 users); Standard \$14; Professional \$23; Enterprise \$40; Ultimate \$52. South African rand prices: R196, R322, R560, R728
Zoho SalesIQ	Website live chat, chatbots and visitor tracking	Free (3 operators); Basic \$10; Professional \$17; Enterprise \$25, per chat operator (monthly billing; lower on annual billing). WhatsApp, Instagram and Facebook Messenger chat from Professional
Zoho Desk	Helpdesk ticketing	Express \$7 (maximum 5 agents); Standard \$14; Professional \$23; Enterprise \$40, per agent
Zoho Campaigns	Email marketing	Priced by number of contacts or emails sent
Zoho Books	Accounting and invoicing; South African VAT edition available	Priced per organisation, not per user
Zoho Inventory	Stock and order management	Priced per organisation, not per user
Zoho Analytics	Business intelligence reporting	Included in Zoho CRM Ultimate; otherwise a separate subscription
Zoho Sign	Electronic signatures	Separate subscription
Zoho Social	Social media publishing and monitoring	Separate subscription
Zoho CRM Plus	Bundle: Zoho CRM (Enterprise level), Desk, SalesIQ, Campaigns, Social, Survey, Analytics, Projects and SalesInbox	\$57 per user (\$69 monthly billing)
Zoho One	Bundle of more than 45 Zoho products	\$37 per employee when every employee is licensed, or \$90 per user when only selected users are licensed

Zoho CRM add-on charges: additional data and file storage, CRM portal users (Zoho CRM Enterprise edition and above, priced per portal user), and light (read-only) agents in Zoho Desk.

2.2 Odoo plans and usage charges

Item	What it covers	Price
One App Free	One Odoo application only (for example CRM), unlimited users, hosted by Odoo	Free
Standard plan	All Odoo applications, hosted by Odoo (Odoo Online)	\$16.90 per user per month list; \$13.50 first-year promotion (South African price tier)
Custom plan	All applications plus Studio, multi-company, external API; required for Odoo.sh and self-hosted Odoo Enterprise	\$32.00 per user per month list; \$25.50 first-year promotion
Community edition	Free open-source edition, self-hosted; includes CRM but not the Enterprise applications (such as Helpdesk, VoIP, WhatsApp, Studio)	Free; hosting and support at the customer's cost

Item	What it covers	Price
Odoo.sh hosting	Odoo's cloud platform for databases with custom code	From about \$102.50 per month (1 worker, 50 GB storage, 1 staging environment)

Odoo usage charges (prepaid credits, bought in packs):

- **Lead Generation:** generating new leads from Odoo's company database, and identifying companies visiting the website and turning those visits into leads
- **Lead and contact enrichment:** adding company data to leads and contacts
- **SMS:** per message, priced by destination country
- **Document digitisation:** reading scanned or PDF vendor bills and expenses (about €0.10 to €0.15 per document, depending on volume)

Odoo users with a valid paid subscription receive free trial credits. Some requirements are met only by third-party modules sold on the Odoo App Store, each with its own price.

2.3 Platform charges that apply whichever CRM is used

Platform	Charge
WhatsApp (Meta)	Meta charges per delivered template message, by message category (marketing, utility, authentication) and destination country. Replies within 24 hours of a customer's own message are not charged. Message templates must be approved by Meta before use
Meta (Facebook, Instagram, WhatsApp)	Automated messaging is subject to Meta's quality ratings; numbers or pages that receive blocks or complaints can have sending limits reduced
X (Twitter)	Posting through third-party software depends on X's API access tiers, which limit volume on the free tier
Telephony	Call charges from the VoIP or telephony provider used with either CRM

3. Technical Platform Overview

Feature / Area	Zoho CRM	Odoo CRM
Product type	Dedicated CRM; other functions are separate Zoho products	One application in a single business system
Deployment	Zoho cloud only	Odoo Online, Odoo.sh, or self-hosted
Data location for South African customers	Zoho European or US data centres; a South African data centre is planned but not yet available	Odoo Online in Odoo's data centres; Odoo.sh in a chosen region; self-hosted anywhere, including South Africa
Licence scope	CRM only	All Odoo applications on Standard and Custom plans
Database	Each Zoho product has its own data, connected by integration	One database for all applications
Source code	Proprietary	Community edition open source; Odoo Enterprise applications proprietary
Billing currency (South Africa)	Rand	US dollar
Upgrades	Continuous, applied by Zoho	Odoo Online upgraded by Odoo; Odoo.sh and self-hosted upgraded per version, with cost depending on custom code

4. Lead Capture and Enrichment

Both products create leads automatically from incoming communication and allow automatic capture to be switched off per channel, so that a person decides which enquiries become leads.

Zoho CRM

- Web forms create leads in the CRM (included); more complex forms through Zoho Forms (separate product)
- Website live chat and visitor tracking through Zoho SalesIQ (separate product); the chat operator can push a visitor to the CRM as a lead, or rules can do it automatically
- Facebook and Instagram lead ads and Google Ads leads flow into the CRM through native integrations
- Emails can be added as leads manually from Zoho's email integration and browser extensions
- Business card scanner in the mobile app creates a lead from a photographed card
- Zia data enrichment adds company information and social profiles to leads and contacts (Zoho CRM Enterprise edition and above)
- Contact-level phone and email data from providers such as ZoomInfo, Lusha and Apollo through Zoho Marketplace connectors (third-party subscriptions)

Odoo CRM

- Website forms create leads, with the source recorded (included)
- Website live chat: the chatbot can create a lead as a scripted step, or the operator creates one from the conversation with a /lead command (included)
- Each sales team can have its own email address; incoming emails create leads assigned to that team (included)
- Event registrations and online appointment bookings create leads (included)
- Outlook and Gmail add-ins create a lead from an individual email in the user's own mailbox (included)
- Helpdesk tickets can be converted into opportunities on the same customer record (included)
- Identifying companies visiting the website and creating leads from those visits (usage charge: Lead Generation credits)
- Enrichment adds company data such as industry, size, address and website from the email domain (usage charge: credits)
- Facebook, Instagram and Google lead ads require connectors or App Store modules (third-party)

Feature / Area	Zoho CRM	Odoo CRM
Website forms to leads	Included	Included
Website live chat to leads	Separate product: Zoho SalesIQ	Included
Email to leads	Included	Included
Manual lead from a single email	Included	Included
Event and appointment bookings to leads	Separate product: Zoho Backstage, Zoho Bookings	Included
Support ticket to opportunity	Separate product: Zoho Desk	Included
Social and Google lead ads	Included	Third-party: connector or App Store module
Website visitor identification to leads	Separate product: Zoho SalesIQ	Usage charge: Lead Generation credits

Feature / Area	Zoho CRM	Odoo CRM
Business card scanner	Included (mobile app)	Third-party
Company data enrichment	Higher edition: Zoho CRM Enterprise	Usage charge: credits
Contact-level phone and email enrichment	Third-party: Marketplace connectors	Third-party: App Store modules or integration
Switch automatic capture off per channel	Included	Included

5. Lead Assignment

The two products assign leads differently. Zoho CRM uses ordered rules and round robin; Odoo uses team and salesperson filters combined with a capacity limit per salesperson.

Zoho CRM

- Assignment rules per module: an ordered list of criteria (such as source, region or value), each sending matching records to a named user, or in rotation (round robin) across a group of users or a role
- A default owner receives records that match no rule
- Territory management assigns records to territories by criteria, with visibility and forecasting following the territory structure (Zoho CRM Enterprise edition and above)
- Web forms and chat can assign directly to a user

Odoo CRM

- Each sales team has a filter defining which leads it accepts (for example country, industry, source or product interest)
- Each salesperson in a team can have their own filter and a capacity: the maximum number of leads they receive per 30 days
- Odoo assigns matching leads to the team, then distributes them across members who match the lead and still have capacity, on a schedule or when a manager runs the assignment
- Website forms, email addresses and chat channels can be tied to a specific team or salesperson; a chat lead goes to the operator who handled the chat
- Resellers app: leads can be forwarded to partner companies (dealers, resellers) by geographic location and partner grade
- Any other assignment logic can be built as an automation rule
- Unassigned leads wait in the team pipeline for a manager

Feature / Area	Zoho CRM	Odoo CRM
Criteria-based assignment rules	Included	Included, configured: team and salesperson filters
Round robin (strict rotation)	Included	Included, configured: automation rule
Territory management	Higher edition: Zoho CRM Enterprise	Not available
Manual assignment by manager	Included	Included

6. Pipeline and Opportunity Management

Zoho CRM

- Separate Leads, Contacts, Accounts and Deals modules; a lead is converted into a contact, account and deal
- Kanban and list views of deals, with multiple pipelines
- Stage probability, expected revenue and closing date per deal
- Tasks, calls and meetings logged against deals, with reminders
- Stage history and time-in-stage reporting
- Page layouts can show different fields at different stages
- Role hierarchy and sharing rules control which deals each user can see

Odoo CRM

- Leads and opportunities can be kept as separate steps or combined into one, as configured
- Kanban pipeline per sales team, with drag-and-drop stage changes
- Expected revenue, probability (entered manually or calculated by predictive scoring), expected closing date and priority per opportunity
- Scheduled activities (call, email, meeting, to-do, document upload) with due dates; completing one activity can automatically schedule the next
- Chatter: one timeline on each record holding every email, note, field change and activity
- Lost reasons recorded when an opportunity is marked lost
- Recurring revenue fields on opportunities, for subscription sales
- List, kanban, calendar, pivot, graph, map and activity views of the same records
- Quotations, sales orders and invoices appear directly on the opportunity

Feature / Area	Zoho CRM	Odoo CRM
Kanban pipeline	Included	Included
Multiple pipelines	Included	Included: one per sales team
Different fields shown at different stages	Included	Higher plan: Studio (Custom plan)
Chained follow-up activities	Included, configured: workflow rules	Included
Full communication history on the record	Included	Included
Lost reason tracking	Included, configured: custom field	Included
Recurring revenue on opportunities	Included, configured: custom fields	Included
Quotes and invoices visible on the opportunity	Higher edition (quotes, Zoho CRM Professional); invoices through Zoho Books (separate product)	Included

7. Sales Process Control and Automation

Zoho CRM includes a dedicated tool for enforcing a sales process. Odoo enforces process rules through general automation and, for field-level rules, through Studio.

Zoho CRM

- **Blueprint** (Zoho CRM Professional edition and above): the sales process is drawn as states and transitions. A deal can only move along defined paths, and each transition can require specific fields, a checklist, attachments or an approval before it completes. A rule such as "a quote must be attached before a deal can move to Negotiation" cannot be skipped by the salesperson.
- Transitions can be limited to specific users or roles, and can have time limits with escalation
- Workflow rules trigger on record creation, edits, field values or dates, with actions such as email alerts, task creation, field updates and webhooks; the number of rules is limited by edition
- Approval processes for discounts, deals or other records
- Validation rules that block incorrect data entry (Professional edition and above)
- CommandCenter: customer journeys spanning several modules and Zoho products (Zoho CRM Enterprise edition and above)
- Custom logic in Deluge, Zoho's scripting language

Odoo CRM

- Automation rules trigger on record creation, update, stage change, time conditions or incoming email, with actions such as field updates, scheduling activities, sending email, SMS or WhatsApp messages, and running Python code; no edition-based limit on the number of rules
- Activity plans: a predefined set of activities launched on an opportunity in one action
- Stage changes are not restricted by default
- Fields can be made mandatory per stage and approval steps added to buttons through Studio (Custom plan)
- Sales order approval above a set amount (Sales settings)

Feature / Area	Zoho CRM	Odoo CRM
Visual stage-control designer	Higher edition: Blueprint, Zoho CRM Professional	Not available
Fields required before a stage change	Higher edition: Blueprint, Zoho CRM Professional	Higher plan: Studio (Custom plan)
Checklists per stage	Higher edition: Blueprint	Included: activity plans (not enforced)
Approval processes	Included	Higher plan: Studio approval rules (Custom plan); sales order approval by amount included
Workflow / automation rules	Included , limited in number by edition	Included, configured; no edition limit
Validation rules	Higher edition: Zoho CRM Professional	Higher plan: Studio (Custom plan)
Scripting	Included: Deluge	Included: Python code in automation rules; full Python modules need the Custom plan with Odoo.sh or self-hosting

8. Email, Calendar and Messaging

Zoho CRM

- Two-way email synchronisation with Gmail, Microsoft 365, Zoho Mail and IMAP mailboxes: emails with contacts appear on CRM records without manual logging
- Email templates, mail merge and scheduled sending
- Open and click tracking on individual emails
- Cadences** (Zoho CRM Enterprise edition and above): a planned series of follow-up emails, calls, tasks and WhatsApp messages sent over set intervals after first contact. The sequence can branch on the contact's response and stops when the contact replies, so salespeople work on contacts who respond instead of manually chasing a full list. Exit conditions must be configured; without them, contacts who have responded continue to receive follow-ups.
- Calendar synchronisation with Google and Microsoft; online booking through Zoho Bookings (separate product)
- Telephony integrations with many VoIP providers, with call logging and click-to-call
- WhatsApp messaging through Zoho's WhatsApp integration (Meta charges apply)

Odoo CRM

- Every email sent from Odoo, or replied to an Odoo email, is stored in the record's chatter
- Outlook and Gmail add-ins let a user log an email, or create a lead, from their own mailbox; emails not logged this way are not captured automatically
- Email templates with fields filled from the record
- Google and Microsoft calendar synchronisation; Appointments app for online booking (included)
- VoIP app with click-to-call, call logging and call queues, through Odoo's VoIP partner or the customer's own SIP provider (included; call charges from the provider)
- WhatsApp app for template and two-way WhatsApp messages on records (included; Meta charges apply)
- SMS from records (usage charge)
- Discuss app for internal chat and video calls linked to records (included)
- No automated sales follow-up sequence in the CRM; Marketing Automation can run timed campaigns to groups of contacts, but is not designed as a salesperson's individual follow-up tool

Feature / Area	Zoho CRM	Odoo CRM
Automatic two-way mailbox synchronisation	Included	Not available: add-ins require the user to log each email, or replies must route through Odoo
Email templates	Included	Included
Open and click tracking per email	Included	Not available for individual emails; included for mass mailings
Automated sales follow-up sequences	Higher edition: Cadences, Zoho CRM Enterprise	Not available in CRM
Calendar synchronisation	Included	Included
Online appointment booking	Separate product: Zoho Bookings	Included
VoIP / click-to-call	Third-party: telephony provider integration	Included: VoIP app; provider call charges apply
WhatsApp	Included: integration; Meta charges apply	Included: WhatsApp app; Meta charges apply

Feature / Area	Zoho CRM	Odoo CRM
SMS	Third-party: SMS provider integration	Usage charge: credits

9. Quoting and Order Handling

In Odoo, a quotation is a draft sales order using the same products, prices, taxes and stock as invoicing and inventory. In Zoho CRM, quotes are created in the CRM; stock levels and invoicing require Zoho Inventory and Zoho Books, or another system.

Zoho CRM

- Quotes, sales orders and invoices modules in the CRM (Zoho CRM Professional edition and above); invoices created in the CRM are records, not accounting entries, unless synchronised to Zoho Books
- CPQ: product configuration rules and price rules (Professional edition and above)
- Price books with list prices and volume discounts
- Product catalogue in the CRM, kept separate from Zoho Inventory or Zoho Books items unless synchronised
- Quote templates and PDF output
- Electronic signature through Zoho Sign (separate product)
- Discount approval through approval processes

Odoo CRM (with the Sales application)

- A quotation is created from the opportunity and stays linked to it
- Products, variants, units of measure and taxes are shared with inventory, purchasing and invoicing
- Pricelists by customer, customer group, quantity, date range or currency, with formula-based rules
- Product configurator for variants and optional products
- Available stock and forecast delivery date shown on each quotation line
- Quotation templates with optional products, terms and validity
- The customer receives the quotation in an online portal, signs it and can pay online
- On confirmation, the quotation becomes a sales order that creates the delivery, manufacturing order or project, and then the invoice
- Margin per line and per order
- Subscription quotations create recurring invoices

Feature / Area	Zoho CRM	Odoo CRM
Quote from opportunity	Higher edition: Zoho CRM Professional	Included
Customer-specific and volume pricing	Included: price books; Higher edition: CPQ price rules, Professional	Included: pricelists
Product configurator	Higher edition: CPQ, Zoho CRM Professional	Included
Stock availability on quote	Separate product: Zoho Inventory	Included
Margin on quote	Included, configured: custom fields	Included
Customer signs quote online	Separate product: Zoho Sign	Included
Customer pays quote online	Separate product: Zoho Books or payment integration	Included; payment provider fees apply
Quote to invoice without re-entry	Separate product: Zoho Books	Included
Recurring billing from quote	Separate product: Zoho Billing	Included: Subscriptions app

10. Forecasting and Reporting

Zoho CRM provides forecasting by role hierarchy and territory, and a deeper reporting tool through Zoho Analytics. Odoo reports on all business data in one database, so pipeline, orders, invoices and payments can be reported together without integration.

Zoho CRM

- Forecasts by user, role hierarchy or territory, with targets and achievement tracking
- Library of standard reports for leads, deals, activities and sales performance
- Custom reports and dashboards; cross-module reports limited to related modules
- Zoho Analytics for complex and cross-product reporting (included in Zoho CRM Ultimate; otherwise a separate subscription)
- Natural-language report queries through Zia (Zoho CRM Enterprise edition and above)
- Scheduled reports by email

Odoo CRM

- Pivot, graph and cohort views on any field of any record
- Forecast view of opportunities grouped by expected closing month
- Sales team targets measured against invoiced revenue
- Activity analysis by user, type and status
- Win and loss analysis by source, team and lost reason
- Spreadsheet dashboards linked live to Odoo data (included in paid plans)
- Reports combining opportunities, orders, invoices, payments and margins
- External BI tools can connect to the database on Odoo.sh and self-hosted installations

Feature / Area	Zoho CRM	Odoo CRM
Forecast by role hierarchy	Included	Not available ; forecast by team and salesperson
Forecast by territory	Higher edition : Zoho CRM Enterprise	Not available
Sales targets	Included	Included : team targets; salesperson targets through Commissions
Custom reports and dashboards	Included	Included
Natural-language report queries	Higher edition : Zoho CRM Enterprise	Not available as a standard feature
Pipeline to invoiced revenue and payments	Separate products : Zoho Books and Zoho Analytics	Included
Margin by customer or salesperson	Separate products : Zoho Books / Inventory and Analytics	Included
Dedicated BI tool	Higher edition : Ultimate includes Zoho Analytics; otherwise separate product	Third-party BI tools (Odoo.sh, self-hosted)

11. AI Features

In both products, predictive features learn from the business's own history. A business with few closed deals receives less reliable predictions in either system.

Zoho CRM (Zia)

- Predictions of a lead's or deal's likelihood to convert or close (Zoho CRM Enterprise edition and above)
- Best-time-to-contact suggestions
- Anomaly detection on sales trends, activity and pipeline
- Email sentiment and intent analysis
- Zia Agents: pre-built AI agents for tasks such as follow-up scheduling, deal analysis and quote generation
- Conversational assistant for queries and record updates
- Use of external AI models through the customer's own API key

Odoo CRM

- Predictive lead scoring: a probability calculated from the business's own won and lost opportunities, using fields such as source, country and stage (included, including Community edition)
- AI-assisted text drafting in emails and chatter
- Odoo 19: AI fields that fill values automatically, and configurable AI agents

Feature / Area	Zoho CRM	Odoo CRM
Predictive lead / deal scoring	Higher edition: Zoho CRM Enterprise	Included
Best time to contact	Higher edition: Zoho CRM Enterprise	Not available
Anomaly detection	Higher edition: Zoho CRM Enterprise	Not available
Email sentiment analysis	Higher edition: Zoho CRM Enterprise	Not available
AI text drafting	Included	Included
Configurable AI agents	Included (Zia Agents)	Included (Odoo 19)

12. Marketing Linked to the CRM

Zoho CRM

- Campaigns module in the CRM records campaigns and links leads and deals to them (included)
- Mass email from the CRM, within edition limits (included)
- Email marketing through Zoho Campaigns (separate product)
- Multi-step marketing journeys through Zoho Marketing Automation (separate product)
- Social media publishing and monitoring through Zoho Social (separate product)
- Web analytics and heatmaps through Zoho PageSense (separate product)
- Event management through Zoho Backstage (separate product)

Odoo CRM

- Email Marketing: campaigns, mailing lists, templates, A/B testing and unsubscribe management (included)
- Marketing Automation: multi-step campaigns triggered by CRM data, form submissions or dates (included)
- SMS marketing (usage charge) and WhatsApp campaigns (Meta charges apply)
- Social Marketing: publishing and engagement tracking for major social platforms (included; X API limits apply)
- Events: event pages, registration and ticketing, with attendees recorded as leads (included)
- Surveys linked to contacts and leads (included)
- Campaign source tracking (UTM) shared by marketing, CRM, sales and invoicing, so revenue can be traced to a campaign (included)

Feature / Area	Zoho CRM	Odoo CRM
Email marketing	Separate product: Zoho Campaigns	Included
Marketing automation	Separate product: Zoho Marketing Automation	Included
Social media publishing	Separate product: Zoho Social	Included
Web heatmaps and page A/B testing	Separate product: Zoho PageSense	Not available
Events and registration	Separate product: Zoho Backstage	Included
Campaign to invoiced revenue	Separate products: Zoho Books and Zoho Analytics	Included

13. Customer Service and Customer Portal

Zoho CRM

- Cases module in the CRM for basic logging of support requests (included)
- Ticketing with service levels, knowledge base and multi-channel support through Zoho Desk (separate product, priced per agent); not included in any Zoho CRM edition
- CRM portals for customers, vendors or partners (Zoho CRM Enterprise edition and above, priced per portal user)

Odoo CRM

- Helpdesk application: ticketing with teams, service-level policies, email, chat, website form and portal channels (included in paid plans; not in Community edition)
- Customer satisfaction ratings and a knowledge base
- Customer portal: customers view and sign quotations, view orders, deliveries and invoices, pay online and raise tickets; portal users are free and unlimited
- Repairs, returns, refunds and field service tasks created from a ticket
- One contact record shows open opportunities, quotations, orders, invoices, payments and tickets

Feature / Area	Zoho CRM	Odoo CRM
Basic case logging	Included	Included
Helpdesk with service levels	Separate product: Zoho Desk	Included
Knowledge base	Separate product: Zoho Desk	Included
Customer portal	Higher edition: Zoho CRM Enterprise; portal users charged	Included; portal users free
Ticket to repair or field service visit	Separate products: Zoho Desk and Zoho FSM	Included

14. Mobile and Field Sales

Zoho CRM

- Dedicated iOS and Android CRM app
- Records available offline, synchronised when reconnected
- Visit check-in with location
- Route planning through Zoho RouteIQ (separate add-on)
- Business card scanner and voice notes

Odoo CRM

- One Odoo app for iOS and Android covering all installed applications, including pipeline, contacts, quotations, stock and invoices
- Map view of opportunities and contacts
- Field Service application for on-site work, with worksheets and customer signature
- Offline use limited to specific applications; the CRM requires a connection
- Business card scanning not included

Feature / Area	Zoho CRM	Odoo CRM
Mobile CRM app	Included	Included
Offline access to CRM records	Included	Not available
Visit check-in with location	Included	Included: Field Service or Attendances
Route planning	Separate product: Zoho RouteIQ	Third-party: map and routing integrations
Business card scanner	Included	Third-party
Quote with live stock from mobile	Separate product: Zoho Inventory	Included

15. Customisation and Data

Zoho CRM

- Custom fields, layouts, modules, buttons and related lists through settings screens (number limited by edition)
- Canvas: drag-and-drop design of record pages
- Deluge scripting for custom functions
- Zoho Creator for custom applications connected to the CRM (separate product)
- Zoho Flow for no-code connections to other applications (separate product)
- REST API with daily call limits by edition
- Data export to CSV and scheduled backups

Odoo CRM

- Studio: add fields, views, reports, automation and approval rules without code (Custom plan)
- Python modules for any change to the application (Odoo.sh and self-hosted)
- Odoo App Store: community and partner modules (third-party, priced individually)
- External API (Custom plan on Odoo Online)
- Standard PostgreSQL database; full database backup on Odoo.sh and self-hosted
- Custom modules must be updated at each major Odoo version, which adds upgrade cost

Feature / Area	Zoho CRM	Odoo CRM
Custom fields and layouts	Included ; limits by edition	Higher plan : Studio (Custom plan)
Code-level changes	Included : Deluge, within Zoho's limits	Higher plan : Python modules (Custom plan, Odoo.sh or self-hosted)
External API	Included ; daily limits by edition	Higher plan : Custom plan on Odoo Online
No-code integration platform	Separate product : Zoho Flow	Third-party : Make, n8n, Zapier
Full database backup	Not available : data backups are exported as files, not a database copy	Included on Odoo.sh and self-hosted
Upgrade impact of customisation	Low; Zoho manages the platform	Custom code must be updated per major version

16. Where the CRM Hands Over to the Rest of the Business

This section is not a comparison of accounting, stock or payroll systems. It shows only what each CRM needs in order to pass a won deal on to those functions.

Hand-over	Zoho CRM	Odoo CRM
Won deal to invoice	Separate product: Zoho Books (South African VAT edition available), synchronised with the CRM	Included: same record
Won deal to stock reservation and delivery	Separate product: Zoho Inventory	Included
Won deal to manufacturing	Not available in Zoho's product range	Included
Won deal to project and timesheets	Separate product: Zoho Projects	Included
Sales commission calculation	Included, configured: workflows; or third-party	Included: Commissions
Commission paid through South African payroll	Third-party payroll system; Zoho Payroll is not available for South Africa	Third-party: South African payroll localisation module from the Odoo App Store

17. What Users Report: Benefits and Limitations

This section records what users and practitioners have published about each product. Each row names its source. Vendor case studies are marked as such, because the vendor selects them.

17.1 Zoho CRM

Reported	Detail	Source
Benefit	Automation handles repetitive work such as sending follow-up emails, assigning leads and updating fields	User review, PeerSpot (2026)
Benefit	Blueprint makes every salesperson follow the same step-by-step process	User review, PeerSpot (2026)
Benefit	Low licence cost relative to Salesforce for comparable CRM features	Zoho South Africa (vendor), August 2026; multiple pricing reviews
Benefit	Eight-week implementation, after which the business reported a 40% increase in customer communications	La Marzocco, quoted by Zoho (vendor case)
Limitation	Once needs expanded to campaigns and sales funnels, the Zoho modules did not work well together; the business moved to another system	Verified user review, Capterra
Limitation	Data had to be re-entered manually from one module to another	Verified user review, Capterra
Limitation	Feature set described as overloaded, with workflow structures too rigid for an agile team	User review, SoftwareFinder
Limitation	Failed deployments typically followed one pattern: contacts imported, automation never configured, and the CRM became a manual data-entry task that staff abandoned	Layer3 Labs (Zoho partner), July 2026
Limitation	Blueprints fail in practice when over-engineered: too many branches and mandatory steps, or a process that does not match how sales actually works	Zenatta (Zoho partner), 2026
Limitation	Cadences without configured exit conditions keep sending follow-ups to contacts who have already replied	Aaxonix (Zoho partner), 2026

17.2 Odoo CRM

Reported	Detail	Source
Benefit	One system managing sales, CRM, inventory, HR, accounting and projects	Verified user review, Capterra (February 2026)
Benefit	Sales, contacts and finances managed together	Verified user review, Capterra (March 2026)
Benefit	Ease of setup, ease of customisation, and tracking of sales activities cited most often	G2 review summary, Odoo CRM (2026)
Benefit	Suited to businesses where sales must connect to operations, inventory, production and accounting	Independent review, Breakcold (2026)
Limitation	Users on Microsoft 365 want full Outlook integration; emails sent from Odoo used a different domain, which confused clients	Verified user review, Capterra
Limitation	Connecting Odoo CRM to third-party platforms reported as difficult	G2 review summary, Odoo CRM (2026)
Limitation	Interface reported as complex for new users during initial setup (other reviewers report the opposite)	Independent review, CRO Club; G2

Reported	Detail	Source
Limitation	Designed for connecting sales to operations rather than for maximising sales activity volume	Independent review, Breakcold (2026)

18. Control versus Productivity

Both products include features that users can experience as monitoring rather than support. Whether a feature helps or controls depends mainly on how it is configured and used. A useful test is whether the feature saves the salesperson time or helps them close business, or whether it only produces information for someone else.

Feature	Zoho CRM	Odoo CRM	Effect on users
Mandatory steps before a stage change	Blueprint (Professional and above)	Studio (Custom plan)	Accepted where steps are needed for compliance or approvals; reported to slow adoption when there are too many mandatory steps (Zenatta, partner)
Activity counts per salesperson	Reports on calls, emails and meetings per user	Activity analysis per user	Where activity counts are used as a performance measure, logging can become the goal rather than selling
Leaderboards	Gamescope and Motivator, including office TV display	Gamification app	Public ranking of salespeople
Location check-in	Mobile check-in with location	Field Service and Attendances	Records where a salesperson was and when
Email open tracking	Per individual email	Mass mailings only	Shows whether a prospect opened an email; also visible to managers
Automated alerts on activity patterns	Zia anomaly detection (Enterprise and above)	Not available	Flags unusual changes in an individual's activity or pipeline
Overdue activity indicators	Overdue tasks and reminders	Overdue activities shown in red on records and in the user's menu	Shows each person's overdue follow-ups
Data visibility across functions	Role hierarchy and sharing rules within the CRM	Access rights span all Odoo applications, including HR, timesheets and expenses	In Odoo, access rights must be designed so users see only what their role requires

Where a CRM is introduced mainly to monitor salespeople, the documented pattern is minimal or late data entry, and the reports the controls were meant to produce become unreliable (Layer3 Labs, partner).

19. Cost

All prices are per month, billed annually, at list price, excluding VAT and implementation. Odoo and most Zoho products other than Zoho CRM are billed in US dollars and converted at R16.50 per US dollar. Zoho CRM rand prices are Zoho's own published rand prices.

19.1 Scenarios at 20 users

Scenario A: CRM with quoting. 20 salespeople.

Option	What is licensed	Per month
Zoho CRM Professional	20 × R322 (quotes require Professional)	R6,440
Odoo Standard	20 × R279; includes CRM, quoting and all other applications	R5,580

Scenario B: CRM, website chat and helpdesk. 20 users, of whom 5 handle chat and 5 handle support tickets.

Option	What is licensed	Per month
Zoho, individual products	Zoho CRM Professional (R6,440) + SalesIQ Professional, 5 operators (≈R1,400) + Zoho Desk Standard, 5 agents (≈R1,155)	≈R9,000
Zoho CRM Plus	20 × \$57 (CRM at Enterprise level, Desk, SalesIQ, Campaigns, Social, Analytics and others)	≈R18,810
Odoo Standard	20 × R279; chat and helpdesk included	R5,580

Scenario C: as Scenario B, plus quote-to-invoice with stock. A business of 30 employees, 20 of whom use the system.

Option	What is licensed	Per month
Zoho, individual products	Scenario B (≈R9,000) + Zoho Books and Zoho Inventory, each priced per organisation	≈R9,000 plus Books and Inventory
Zoho One, all employees	30 employees × \$37	≈R18,315
Zoho One, selected users	20 users × \$90	≈R29,700
Odoo Standard	20 × R279; invoicing and inventory included	R5,580
Odoo Custom (if Studio or the external API is needed)	20 × R528	R10,560

19.2 Cost as needs grow

Each step adds one need. The table shows what each vendor requires to meet it at 20 users.

Step	Need added	Zoho	Odoo
1	CRM only, no quoting	Zoho CRM Standard: R3,920	One App Free (CRM only): R0
2	Quoting	Upgrade to Zoho CRM Professional: R6,440	Standard plan: R5,580
3	Website chat	Add SalesIQ (separate product)	Included

Step	Need added	Zoho	Odoo
4	Helpdesk	Add Zoho Desk (separate product), or move to CRM Plus	Included
5	Email marketing	Add Zoho Campaigns, or move to CRM Plus	Included
6	Automated sales follow-up sequences	Upgrade to Zoho CRM Enterprise: R11,200	Not available
7	Quote to invoice and stock	Add Zoho Books and Zoho Inventory, or move to Zoho One	Included
8	Custom fields, stage-required fields, external API	Included in Zoho CRM (Blueprint from Professional)	Upgrade to Custom plan: R10,560

19.3 Other cost items

- **Implementation:** configuration, data migration, integration and training are quoted per project for both products
- **Exchange rate:** Odoo's rand cost changes with the USD/ZAR rate; Zoho CRM's rand prices do not
- **Usage charges:** Odoo credits (Section 2.2); Meta, X and telephony charges for both (Section 2.3)
- **Integration maintenance:** where Zoho CRM is connected to non-Zoho accounting or stock systems, connector subscriptions and maintenance apply

20. Decision Guide

Zoho CRM fits where:

- The sales process requires enforced stages, mandatory information or approvals, and the business will use Zoho CRM Professional edition or above
- Salespeople work mainly in their mailbox and need emails captured on records automatically, without logging each one
- Automated follow-up sequences that stop on reply are needed, at Zoho CRM Enterprise edition
- Sales are organised by territory, or forecasts need to roll up a management hierarchy
- Field salespeople need CRM records offline
- Accounting, stock and payroll are already handled by other systems that will remain in place

Odoo CRM fits where:

- Quotes need live stock, customer-specific pricing or product configuration, and should become orders and invoices without re-entry
- Website chat, helpdesk, email marketing and events are needed alongside the CRM, without separate products
- Management needs reports from pipeline through to invoiced revenue and payments received
- Leads are distributed by each salesperson's capacity, or forwarded to resellers or dealers by location and partner grade
- Customers should sign quotes, pay and view orders and invoices in a portal, with no charge per portal user
- Data must be hosted in South Africa, or the business wants a full copy of its database

Using Odoo with a separate CRM

Some businesses use Odoo for operations and invoicing, and Zoho CRM or another dedicated CRM for sales. This adds a second licence for sales users, an integration to build and maintain, and a second database to keep consistent. The single record from first contact to payment, which is the main reason for using Odoo's CRM, is lost.

Hatton Locks position: Hatton Locks implements Odoo. Where Zoho CRM fits a business's requirements more closely, Hatton Locks will recommend it.

21. Master Summary Table

Feature / Area	Zoho CRM	Odoo CRM
Website forms to leads	Included	Included
Website live chat	Separate product: SalesIQ	Included
Social and Google lead ads	Included	Third-party
Website visitor identification	Separate product: SalesIQ	Usage charge: credits
Company data enrichment	Higher edition: Enterprise	Usage charge: credits
Round robin assignment	Included	Included, configured
Territory management	Higher edition: Enterprise	Not available
Pipeline management	Included	Included
Chained follow-up activities	Included, configured	Included
Visual stage-control designer	Higher edition: Professional	Not available
Required fields per stage	Higher edition: Professional	Higher plan: Custom
Automation rules	Included, limited by edition	Included, configured
Automatic mailbox synchronisation	Included	Not available
Per-email open tracking	Included	Not available
Automated sales sequences	Higher edition: Enterprise	Not available
Appointment booking	Separate product: Bookings	Included
VoIP	Third-party	Included
WhatsApp	Included; Meta charges	Included; Meta charges
Quotes	Higher edition: Professional	Included
Live stock on quotes	Separate product: Inventory	Included
Online quote signature	Separate product: Sign	Included
Quote to invoice	Separate product: Books	Included
Forecast by hierarchy or territory	Included / Higher edition: Enterprise	Not available
Pipeline-to-payment reporting	Separate products: Books, Analytics	Included
Predictive scoring	Higher edition: Enterprise	Included
Email marketing	Separate product: Campaigns	Included
Marketing automation	Separate product	Included
Helpdesk	Separate product: Desk	Included
Customer portal	Higher edition: Enterprise; per-user charge	Included; free portal users
Offline mobile CRM	Included	Not available
No-code customisation	Included	Higher plan: Custom
External API	Included, limits by edition	Higher plan: Custom (Odoo Online)
Hosting in South Africa	Not available	Included: self-hosted

Feature / Area	Zoho CRM	Odoo CRM
Billing in rand	Included	Not available

Glossary

Term	Meaning
Activity (Odoo)	A scheduled follow-up (call, email, meeting, to-do) with a due date, attached to a record
Blueprint (Zoho)	Zoho CRM's tool for drawing a sales process as stages and allowed transitions, with requirements at each transition
Cadences (Zoho)	Zoho CRM's automated follow-up sequences, which stop when the contact replies
Capacity-based assignment	Distributing leads so that each salesperson receives no more than a set number in a period
Chatter (Odoo)	The timeline on each Odoo record holding its emails, notes, changes and activities
CommandCenter (Zoho)	Zoho's tool for designing customer journeys across several modules and products
Community edition (Odoo)	The free, open-source version of Odoo; excludes the Odoo Enterprise applications
Credits (Odoo IAP)	Prepaid units used to pay for Odoo's usage-based services, such as SMS and lead generation
Custom plan (Odoo)	Odoo's higher paid plan; adds Studio, multi-company and external API, and is required for Odoo.sh and self-hosting
Deluge (Zoho)	Zoho's scripting language for custom logic
Enterprise	Zoho CRM Enterprise is a Zoho CRM edition; Odoo Enterprise is the paid version of Odoo
Lead / opportunity	A lead is an unqualified enquiry; an opportunity (Zoho: deal) is a qualified potential sale
Light agent (Zoho Desk)	A user who can view but not answer tickets, licensed at a lower price
Odoo.sh	Odoo's cloud hosting platform for databases with custom code
Operator (Zoho SalesIQ)	A user who answers website chats; SalesIQ is priced per operator
Portal user	A customer or partner who logs in to view their own documents; charged in Zoho CRM, free in Odoo
Round robin	Assigning leads in strict rotation across a group of salespeople
Studio (Odoo)	Odoo's no-code tool for adding fields, views, reports and rules; requires the Custom plan
UTM	Tags on links that record which campaign and source brought a visitor or lead
Zia (Zoho)	Zoho's AI assistant, providing predictions, suggestions and anomaly detection

Sources

Prices and product details checked in early October 2026. Vendors change prices and features regularly; confirm current figures before purchasing.

Pricing

- Odoo pricing, South African price tier, from the odoo.com configurator (OEC.sh): <https://oec.sh/odoo-pricing/south-africa>
- Odoo regional pricing and Odoo.sh hosting costs (OEC.sh): <https://oec.sh/odoo-pricing>
- Odoo in-app purchase (IAP) services:
https://www.odoo.com/documentation/19.0/applications/essentials/in_app_purchase.html

- Zoho CRM rand pricing for South Africa (Zoho, August 2026): <https://www.zoho.com/en-me/techbizz/salesforce-vs-zoho-crm-south-africa-professional-services.html>
- Zoho CRM editions and monthly pricing (Capterra): <https://capterra.com/p/155928/Zoho-CRM/pricing/>
- Zoho CRM Plus contents and pricing (Codestringers, Aaxonix, 2026): <https://www.codestringers.com/articles/zoho-crm-plus-cost>
- Zoho One pricing (Aaxonix, July 2026): <https://aaxonix.com/resources/zoho-one-review-2026-worth-it/>
- Zoho Desk pricing (Desk365, 2026): <https://www.desk365.io/blog/zoho-desk-pricing>
- Zoho SalesIQ pricing (Capterra South Africa; Apple App Store listing): <https://www.capterra.co.za/software/168135/zoho-salesiq>
- Exchange rate: R16.50 per US dollar, within the 2026 mid-market range of about R16.40 to R16.80

Product availability in South Africa

- Zoho Books South Africa VAT edition (Zoho blog): <https://blog.zoho.com/index.php/general/south-africa-edition-launch.html>
- Zoho South Africa data centre plans and payroll gap (ITWeb; Engineering News, July 2026): <https://www.itweb.co.za/article/zoho-sa-revenue-grows-34-as-enterprise-adoption-increases/RgeVDqPRk8N7KJN3>

Features and user experience

- Zoho Blueprint overview (Zoho): <https://help.zoho.com/portal/en/kb/crm-v2/process-management/blueprint/articles/crm-v2-blueprint-an-overview>
- Zoho Blueprint design and failure modes (Zenatta, 2026): <https://zenatta.com/?p=55422>
- Zoho Cadences configuration and editions (Aaxonix, 2026): <https://aaxonix.com/resources/?p=3621>
- Zoho CRM AI and Cadences overview (ZoomInfo review, 2026): <https://pipeline.zoominfo.com/sales/zoho-crm-review>
- Zoho CRM user review (PeerSpot): https://www.peerspot.com/product_reviews/zoho-crm-review-4271644-by-shehbaz-hussain
- Zoho CRM verified user reviews (Capterra): <https://www.capterra.com/p/155928/Zoho-CRM/reviews/>
- Zoho CRM user reviews (SoftwareFinder): <https://softwarefinder.com/crm/zoho/reviews?page=65>
- Zoho CRM pros and cons (Layer3 Labs, July 2026): <https://www.layer3labs.io/guides/zoho-crm-pros-and-cons>
- Odoo verified user reviews (Capterra): <https://capterra.com/p/135618/Odoo/reviews/?page=3>
- Odoo CRM review summary (G2): https://g2.com/survey_responses/odoo-crm-review-5184145
- Odoo CRM review (Breakcold, 2026): <https://www.breakcold.com/fr/blog/odoo-crm-review>
- Odoo CRM review (CRO Club): <https://croclub.com/tools/odoo-crm-review/>