



LOT 2

CLOUD SOFTWARE

G-Cloud 15 | Service Definition



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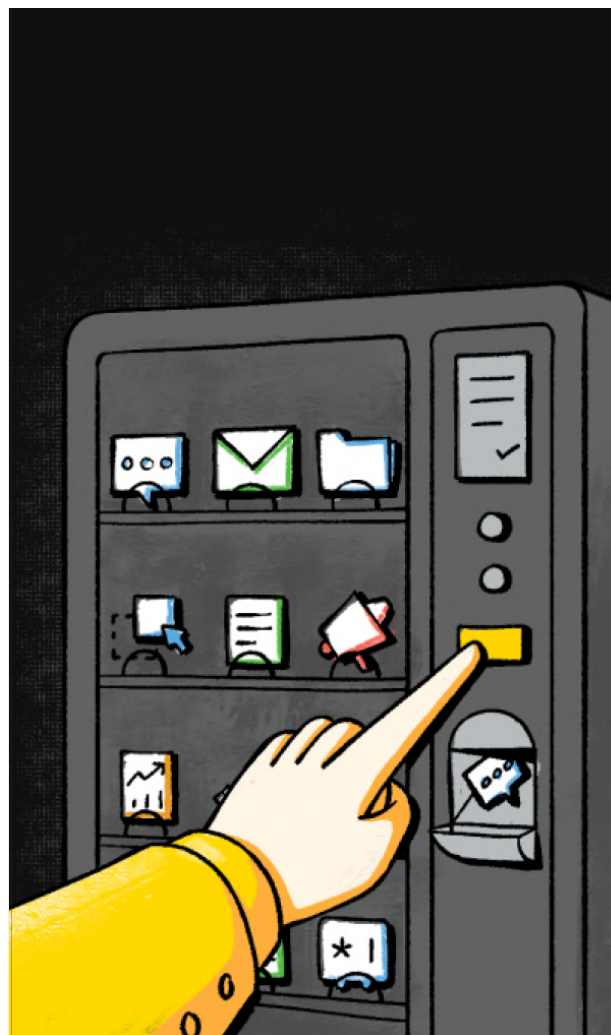
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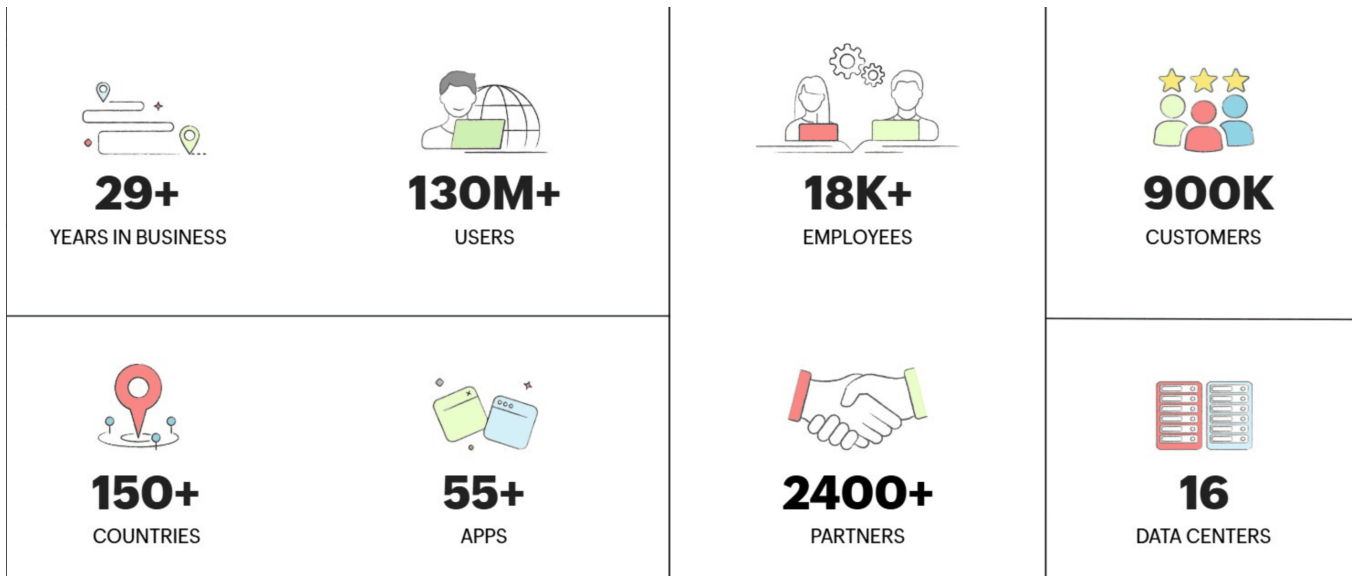
Company Overview

Founded in 1996, Zoho Corporation Limited is a fast growing and profitable organization developing software for a wide-range of private and public sector industries. The Zoho brand itself was introduced in 2005 after the company experienced tremendous growth and interest in its suite of emerging online applications, and it now has over 50+ cloud based applications. Based on the success of the online suite and the huge opportunity in cloud computing, the company was renamed to Zoho Corp in 2009. Zoho has emerged as a leading player in online productivity, collaboration and business applications. The company has achieved consistent revenue growth (averaging about 35% a year) over the past 25 years without ever seeking outside investment capital.

Now with 15000+ employees and offices on five continents, Zoho has more than 500,000 customers worldwide spanning over 180 countries. Zoho has its global headquarters in Chennai, India and corporate headquarters in Texas, US with offices in North America, South America, Europe, Asia, Australia, and partners worldwide. With a profitable business model and a heavy emphasis on R&D (more than 70% of employees are in engineering & development), Zoho will continue to develop new applications and evolve its existing applications to meet demand.

From its humble beginnings (six people), Zoho founders emphasized organic growth and customer service; deciding from day one to focus on engineering excellence and innovation not on profit for its sake. The decision to remain independent without VC backing or an “exit strategy” has proved to be invaluable. The company remains debt-free, profitable and cash flow positive emphasizing a conservative fiscal responsibility and commitment to employee development and its long term future.





Zoho has vast experience in working with the enterprise segment from various domains such as banking, financial, insurance, manufacturing, telecom, government, real estate, logistics etc.

Value Proposition

Zoho pioneers with strong experience in implementing & integrating customer engagement tools for various sectors. We focus on building a strong and long term strategic relationship with customers across the globe. Zoho One offers a comprehensive suite of applications designed to address various aspects of organizational management, including customer relationship management (CRM), human resources management, finance, project management, collaboration, and more.

Leveraging Zoho One can indeed provide significant benefits for government and public sector organizations in the UK:

Cost-Effectiveness

Zoho One provides a suite of over 40 integrated applications at a fixed monthly price per user, offering substantial cost savings compared to procuring individual software solutions for each department or function within the organization. This cost-effectiveness is particularly beneficial for government entities with constrained budgets.

Customization and Scalability

Zoho One's applications are highly customizable, enabling government organizations to tailor the software to their specific requirements and processes. Moreover, Zoho One is scalable, allowing organizations to add or remove users and applications as needed, making it suitable for both small local councils and large government agencies.

Data Security and Compliance

Zoho takes data security and compliance seriously, offering robust security features, including data encryption, role-based access controls, and compliance with regulations such as GDPR. This is particularly crucial for government organizations handling sensitive citizen data.

Improved Citizen Services

By streamlining operations and enhancing internal efficiency, government organizations using Zoho One can allocate more resources and focus on delivering better services to citizens. For example, a government agency can use Zoho CRM to manage citizen inquiries and complaints more effectively, resulting in faster response times and improved satisfaction.

Training and Support

Zoho offers comprehensive training resources and support to help government organizations maximize the value of their investment in Zoho One. This includes online documentation, tutorials, webinars, and dedicated customer support channels.

By leveraging Zoho One, government and public sector organizations in the UK can overcome IT challenges, streamline operations, and ultimately deliver better services to citizens.

Integrated Solution

Zoho One offers a seamlessly integrated platform, allowing different departments and teams within a government organization to access and share data easily. This integration enhances collaboration, streamlines workflows, and eliminates silos that often hinder efficiency and effectiveness in public sector organizations.

Analytics and Reporting

Zoho One provides powerful analytics and reporting capabilities, allowing government organizations to gain insights from their data and make data-driven decisions. This can help identify trends, optimize processes, and allocate resources more efficiently, ultimately leading to better outcomes for citizens.

Mobile Accessibility

Many of Zoho's applications are accessible via mobile devices, enabling government workers to access essential tools and information while on the go. This mobility can improve productivity and responsiveness, especially for field workers or employees who need to work remotely.

What the Service Provides

Zoho One is a one-stop unified platform solution to address every business need of Government entities & public sectors and help in efficiently tracking & managing the end-to-end journey of customer in an integrated platform. Zoho One is an integrated suite of 45+ applications with advanced enterprise-class capabilities that will enable the buyer to digitally transform the entire business process. It offers a uniquely unified & integrated set of applications that can be customized based on the needs of the buyer to manage the sales, marketing, finance & accounting, operations, support and many other capabilities in a unified platform.

Zoho One with its integrated business and productivity applications will enable buyers to effectively capture leads from multiple sources, empower the sales & presales team with crucial information to make informed decisions, reach customers through an omni-channel network, create greater operational efficiency by automating the business process, foster higher levels of productivity for sales, operations, finance and support teams.

Zoho One provides strong platform capabilities that will enable the buyer to leverage the following:

Empower the sales team with a comprehensive set of tools to effectively reach customers through omni-channel

Reach out to the right prospect with marketing automation

Create intuitive interfaces & enhance visual experience using Canva design studio

Deeper level of insights with 80+ built-in reports

Full range of integrated mobile apps

Deliver exceptional service to customers

Achieve higher sales conversions with personalized customer engagement

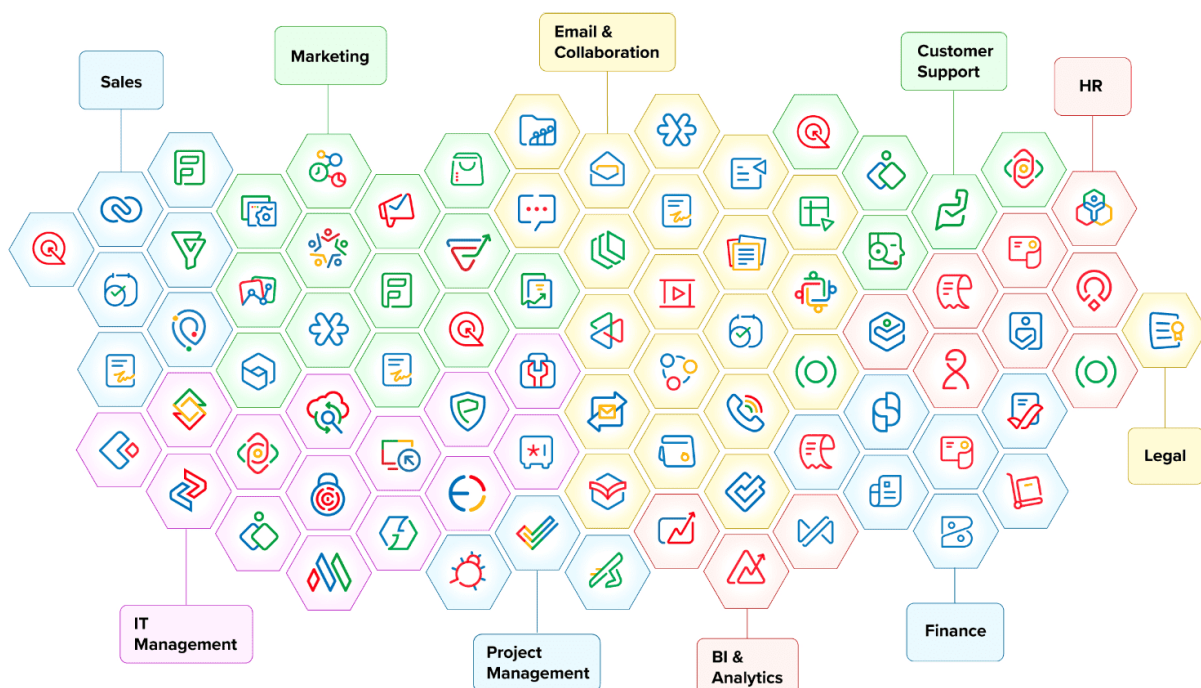
Have a unified and connected module for the entire product development process with budget templates and approvals

Forecast sales with a smarter & predictive AI

Support customer requests across channels from one place

Seamless integration with the third-party applications

Zoho One Suit of products



Social Value

Fighting climate change

Zoho Corporation Limited have committed to working towards achieving Net-zero by 2050. Some initiatives for this:

Green data centres

We've partnered with Equinix to host our UK data centres in London and Manchester. Equinix is also committed to sustainability and is compliant with the Climate Neutral Data Centre Pact, ISO 14001, LEED, etc.

Energy initiatives at Zoho UK's workspace at Bletchley -

The energy supply for the UK office is derived from renewable sources, accounting for 21% of total power consumption. LED retrofits have been implemented to enhance energy efficiency throughout the building.

Renewable energy

We've built a 5 megawatt on-grid solar energy farm at Abinimangalam near Trichy, India. This farm offsets the electricity consumption of our Chennai headquarters and data centre. Designed with a focus on energy efficiency, data centres that support Zoho UK are powered by renewable energy. Further, these data centres are progressing towards integrating with a solar grid to reduce environmental impacts.

e-mobility

We've switched completely to electric vehicles for movement within the campus.

Green Energy Procurement

All purchased energy for the data centres is sourced from green energy providers. This enables us to minimise the carbon footprint associated with our operations.

Emissions

The United Kingdom has committed to achieving carbon neutrality by 2050. Supporting this pledge, we have taken steps to monitor greenhouse gas (GHG) emissions from our operations and implement measures to mitigate them. We account for Scope 2 and Scope 3 emissions and exclude Scope 1 emissions as our work does not involve fuel combustion within operational boundaries.

Energy efficient operations

We use IoT to measure and optimize energy consumption across our offices. We've also implemented LED lighting, energy-efficient equipment, and IoT based energy management to reduce our energy consumption and greenhouse gas emissions.

Sustainable procurement

We encourage sourcing materials from suppliers who have environment friendly practices. We also recycle obsolete gadgets by sending them to an e-waste recycling unit.

Recycling and waste reduction

All the waste generated on campus is segregated at source. Food waste is processed in our own biogas plant which generates the electricity used to run the plant. All other waste is sent to the recycling vendors for recycling it.

Minimizing water usage

We use an in-house sewage treatment plant to treat waste water for reuse for flushing, gardening and cooling tanks. We've also implemented IoT sensors to detect water leakage, rain-detecting sprinklers systems, and smart water management, to monitor and reduce our water usage and wastage.

Tackling economic inequality

Zoho has always aimed to tackle economic inequality and give back to the community. This is reflected in the following

Transnational localism

Coined by our CEO, transnational localism is the philosophy that underpins our staffing and office location plans. Instead of focusing on crowded urban centres, we've been opening spoke offices in smaller towns and villages. The goal is to improve local infrastructure, boost the economy of these smaller towns and villages, and provide more employment opportunity.

Local hiring

As part of our philosophy of transnational localism, we believe in hiring locally for each spoke office. This helps promote local talent and bring high-paying jobs back to the villages and towns where we are based.

Zoho Schools of Learning

Started in 2004, Zoho Schools of Learning (formerly Zoho University) provides training and employment for high school students and those holding or pursuing diplomas. Those inducted into Zoho Schools are trained by industry experts in the fields of their choice - technology, business, or design.



The students are also trained in social skills. The course is completely free and students are paid a monthly stipend throughout its duration. Graduates from this program are automatically inducted into Zoho Corp.

Equal Opportunity

As part of our efforts to tackle inequality, Zoho Corporation Limited have made efforts to provide equal opportunities and tackle workforce inequality.

Helping women restart their careers

Zoho Schools of Learning has begun a program called Marupadi. Aimed at helping women restart their tech careers after a break, Marupadi is a 3 month program comprising a mix of lectures, experiential learning and internships. At the end of the program, the candidates who've successfully completed training get to sit for exclusive face-to-face interviews for jobs at Zoho Corp.

We eschew discrimination on any grounds, including age, colour, disability, ethnicity, family or marital status, gender identity or expression, language, national origin, physical and mental ability, political affiliation, race, religion, sexual orientation, socio-economic status, and other unique characteristics that define our associates. Instead, we espouse fairness, striving to ensure that a merit-based approach allows wage parity among associates with comparable experiences and responsibilities, irrespective of their gender.

Accessible campus

Our campus has been designed to be accessible to all, including differently-abled colleagues. The layout design includes ramps and lifts in every building, allowing ease of mobility and access to all.

On-campus crèche and daycare

We support new parents within the organization by providing them with on-campus creche, day-care and play school.

Apart from the usual shuttle facilities, special cab service covering a certain distance is given for women during their third trimester.

Wellbeing

Zoho UK adheres to industry standards in remuneration, ensuring that compensation is equitable across genders. Recognising the diverse needs of our people, we provide essential support such as parental leave, aligning with our efforts to build an organisation that values and cares for every individual.

Free on-campus medical services

We have trained medical practitioners and a dedicated medical clinic available on all days of the week. Employees can freely avail their services for any medical requirements. The cost of consultation is borne completely by the company.

Free medical camps

We organize free medical check-ups for our employees on an annual basis.

Blood donation camps

We organize regular blood donation camps in association with various blood banks.

Hazard Management Framework

The Hazard Identification & Risk Assessment (HIRA) Framework is followed rigorously at the premises. Under this, regular assessments are conducted to identify workplace hazards and evaluate social risks.

In-house mental health counselling

We provide in-house counselling to our employees for free via our team of trained and qualified therapists.

Day Care facilities for employee kids

Employee Engagement

With respect to employee engagement, we prioritise transparent communication and foster a supportive work environment. Our talent acquisition process emphasises diversity and inclusion with the aim of building a talent pool that offers the richness of diverse skills, experiences, and cultural perspectives.

Continuous Improvement

The compliance monitoring framework involves ongoing reviews and enhancements of occupational health programmes, guided by feedback, data analysis, and emerging best practices. We foster a culture of continuous improvement, encouraging employee engagement, and incorporating insights from incidents or near misses.

Open House Sessions

We have open house sessions conducted by the CEO periodically where employees can raise any concerns. Team level open house sessions (from operations teams) are done every week.

The onboarding for new employees begins with the Security and Privacy Awareness (SPA) quiz. This short assessment ensures that our employees possess a basic understanding of our compliance regulations and ethical practices. Subsequently, they undergo a comprehensive departmental training spread over 3-4 weeks. This immersive programme is designed to equip new joiners with the necessary understanding and skills to excel in their role. In addition, they can access learning resources through our Zoho Learn platform. This online portal houses a range of materials, including product tutorials, system guides, and best practices, enabling them to enhance knowledge and expertise.

Employee retention is an area of focus which we address by implementing programmes tailored for professional development, mentorship, and work-life balance. In turn, these contribute to a dynamic, inclusive, and fulfilling work culture. Further, we make sure to communicate career growth opportunities, enabling employees to feel valued and motivated. By emphasising continuous progress and adapting to evolving employee needs, we work to build an organisation remains a place where talent flourishes over the long term.

Governance

Zoho UK's operations are underpinned by ethical governance, which require every employee to demonstrate integrity in business conduct, while also ensuring the company's compliance with legal and regulatory requirements. Business integrity is not only the foundation on which Zoho UK's reputation is being built, it also enhances our capacity to forge enduring stakeholder relationships that enable us to create shared value in the long term.

The following section outlines our policy framework comprising the Code of Ethics Policy Framework

Code of ethics

The Code of Ethics is a set of guidelines for ethical behaviour characterised by integrity, respect, and responsibility. It is applicable to all Zoho UK's workforce, including employees, consultants, and interns. The Code of Ethics emphasises the following for workplace and business conduct

Fairness

We foster a diverse and inclusive work environment, promoting equal opportunities for all, thereby embracing the values of Equality Act 2010.

Privacy

Responsible handling of personal information acknowledging resource limitations.

Respect

Harassment is eschewed, and a clear reporting mechanism has been put in place to register concerns.

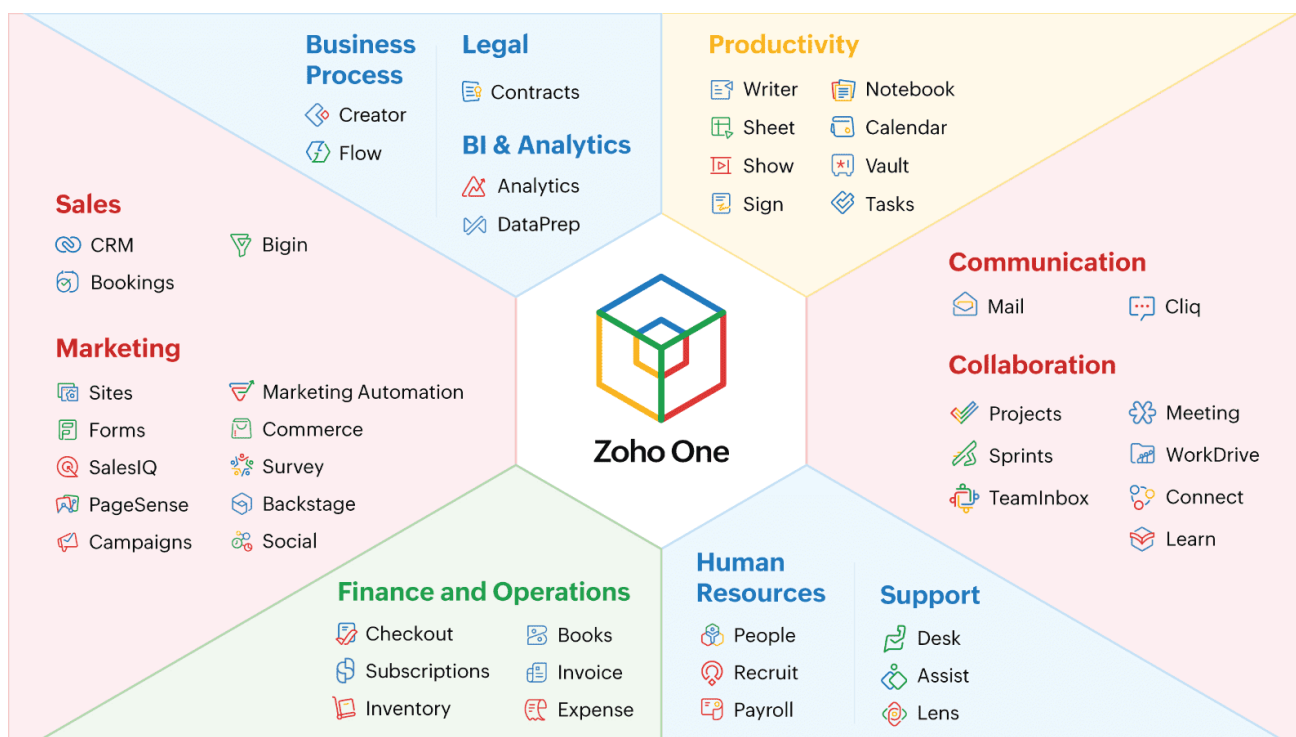
Ethical Sourcing

Zoho UK stands against forced labour, slavery, and human trafficking, and promotes ethical procurement practices.

Overview of the G-Cloud Services

Zoho One is an All-in-One Operating System for Business with a unified suite of applications that is contextually integrated for teams across sales, marketing, support, HR, finance to work as one in an organization.

Zoho One offers a range of tools to help build custom applications, create specialized workflows, and automate your business processes. Zoho One is a journey more than 15 years in the making. We launched it with 35+ apps—both mobile and web—and today we have over 45 apps and services.



This is the Zoho One promise - the operating system for business will continue to add value by way of apps, services, and platform extensions.

The key applications of Zoho One platform are detailed below,

Sales



Build excellent customer relationships across sales, marketing and customer service

<https://www.zoho.com/in/crm>

Zoho Customer Relationship Management (CRM) delivers an exceptional experience to every customer & internal teams by providing a 360 degree view of information for key stakeholders. Zoho CRM provides intuitive features to streamline operations such as acquiring & managing customer information, digital marketing, automation of standard processes, advanced AI capabilities along with advanced analytics to boost productivity.

Zoho's CRM also offers powerful interoperability with third party systems to deliver notifications, sync data, trigger automated processes and even adapt a user's experience with contextual information from orders, to contracts and marketing communication. It also provides flexibility for teams to collaborate in real time and have a holistic view of customer information all in one integrated place. The Zoho CRM will help Organizations to achieve its primary objectives of a unified system to manage customer data repository and build a seamless business process which is scalable, futuristic and offers best-in-class services to their customers.

Key capabilities of Zoho CRM

- Omni-channel communication platform
- Create intuitive interfaces & enhance visual experience using Canvas design studio
- Empower internal teams with 360-degree customer experience
- Achieve higher tiers of satisfaction with personalized customer engagement
- Automate sales routines & support tasks with Blueprint
- Measure performances and improve ROI
- Foster strong customer relationships
- Deeper level of insights with 80+ built-in reports
- Seamless integration and migration from existing applications
- Full range of integrated mobile apps
- Deliver exceptional service to customers

Core features of Zoho CRM

- Sales Force Automation
- Leads Management
- Contacts Management
- Accounts
- Scoring Rules
- Wizards
- Inventory Management
- Document Library
- Process Management
- Workflow Automation
- Prediction & AI
- Reports

- Deals
- Omni-Channel Engagement
- Sales Forecasting
- Email Insights
- Product Customization
- Canvas View - Enhanced UX
- Customer 360 Degree View
- Automation
- Analytics & Insights
- KPIs, Charts, Dashboards
- Social Media Management
- Team Collaboration



Customer Engagement platform for the business

<https://www.zoho.com/salesiq/>

Zoho SalesIQ offers the marketing, sales, and support teams the digital customer engagement tools to communicate with every site visitor at every stage of the customer lifecycle. This all-in-one live chat and analytics platform promotes proactive customer engagement, allows the team to initiate the right kind of conversation at exactly the right time. It helps to engage every prospect that visits the website, sets up automated triggers for different scenarios to initiate a chat with visitors at exactly the right moment, strike up a conversation with prospects by sending a message or showing a custom banner based on their areas of interest and how much time they've spent on the company web pages.

Key capabilities of Zoho SalesIQ

- Website Visitor Insights
- Helps with lead scoring
- Create intuitive codeless bots
- Omni-channel mode of Communication
- Dive deep into stats with Zoho Analytics
- Offer data and action based widgets
- Streamline the customer support using integration with CRM and Desk
- Leverage team's strength with collaborations
- Track critical KPIs and metrics for improvements
- Streamline visitor engagement and support with automation

Core features of Zoho SalesIQ

- Visitor Tracking
- Smart Chatbots
- Communication Modes
- Chat Routing
- Target and Routing
- Agent Mobile Apps
- Reports and Monitoring
- Analytics
- CRM & Desk Integrations
- Widgets



Online scheduler for offering the best consultations

<https://www.zoho.com/bookings/>

Zoho Bookings helps to sync the calendars while letting customers self-schedule and pay for appointments. The user interface of Bookings allows auto-customizes based on the industry and helps with smart scheduling of appointments across teams, departments and services.

Key capabilities of Zoho Bookings

- Manage booking on the go using mobile app
- Get real time notifications
- Schedule appointments to meet either online or offline
- Schedule appointments across teams & departments
- Seamless integration with Zoho Apps and other calendar & scheduling apps
- Provide custom booking page and online payments
- Improve productivity by automatic the scheduling activity

Core features of Zoho Bookings

- Sync Calendars
- Buffer Time
- Plan and Work Breaks
- Time-Off and Special Hours
- Booking Form
- Online Payments
- Push Notifications
- Calendar Dashboards
- Workflows & APIs
- Roles & Designations



A complete digital signature app for business signatories

<https://www.zoho.com/sign/>

Zoho Sign is a digital signature solution that is a part of Zoho's powerful business suite. In government and public service departments, stakeholders want all administrative tasks to be digitized and completed from anywhere through mobile devices. With Zoho Sign, public services can use electronic signatures to improve internal productivity and overall experience.

Zoho Sign integrates readily with other Zoho apps such as Zoho CRM and Writer and works with all daily apps, including Google Drive, Dropbox, Box, and OneDrive, making it easy to sign contracts anywhere and keep the deals moving forward. Zoho Sign works through PKI (public key infrastructure) to provide the highest levels of security for all the documents. The data is protected using AES-256 encryption while at rest and SSL encryption while in transit. Multi-factor verification, access codes, and audit trails add an extra layer of protection, allowing the user to send and sign documents with confidence.

Key capabilities of Zoho Sign

- Securely sign, send and manage documents
- Digitally sign documents
- Military grade encryption
- Configure workflows
- Track document status
- Create customizable templates

Core features of Zoho Sign

- Electronic Signature
- Branding
- Sign Forms
- In-Person Signing
- Bulk Send
- Blockchain Time-stamping
- API Integration
- Cloud Backup
- Remote Collaboration
- Advanced Authentication



Zoho Campaigns

Contextual driven marketing application to reach, engage the audience & improve ROI

<https://www.zoho.com/campaigns/>

Zoho Campaigns is a digital marketing application that helps to create, send, and track email campaigns to build a strong customer base. It provides a range of beautiful email templates to an easy-to-use editor and automation tools to real-time analytics. It helps the marketing & sales team to engage with customers and effectively stay connected with them.

Key capabilities of Zoho Campaigns

- Create responsive designs, customize messages, deliver emails to inboxes
- Design business-defined Campaign journeys with ease for every single action point
- Real time analytics
- Track real-time Campaign efficiency
- Trigger regular Email, SMS & WhatsApp campaigns on any desired stage of Lead or Customer lifecycle
- Real time analytics

Core features of Zoho Campaigns

- Dynamic Personalization
- Email Interactivity
- Advanced Email Automation
- Drag & Drop Workflows
- Auto Responders
- Email Cadence
- A/B Testing
- Subscriber Management
- Pre-defined Templates
- Social Media Campaigns
- Send Time Optimization
- Real time Analytics



Zoho Survey

Simple, effective & crafted feedback management system for online surveys

<https://www.zoho.com/survey/>

Zoho Survey provides a slew of features that enables Clients to achieve the best in terms of both research and feedback based on the product and services. Zoho Survey was launched to cater to the growing needs of the survey market.

Zoho Survey helps to communicate with a diverse audience across various segments. It helps for effective feedback mechanism via surveys, created by using over 25 question types and 250 multi-lingual survey templates, customized themes, integrations and branding.

Key capabilities of Zoho Survey

- Create secure online surveys using GDPR compliance
- Personalize survey to reflect own remarkable style

- Analyze responses using Sentiment and Text analysis
- Customizable reports help you visualize response trends and make informed decisions
- 250+ pre-defined templates to craft surveys
- Integration with connects apps
- Provides logic conditions to define how respondents move through questions
- SSL certified and private

Core features of Zoho Survey

- Questions Type
- Drag & Drop Questions
- Scoring Logic
- 250+ Templates
- Custom Variables
- Piping
- Web Links
- Custom Domain Links
- Private Group Access
- Email Campaigns
- Social Media Integrations
- Reports & Analytics
- Auto-Fill
- White-Labeling
- Sentiment Analysis
- Secured & GDPR Compliance



Social Media Management software to manage the brands on social media

<https://www.zoho.com/social/>

Zoho Social is the social media management software to analyze the social media performance and improve the brand value of the organization. It also helps to schedule posts, monitor the trend, hashtags, posts, comments and responses, create custom reports across all the social media platforms like Facebook, Twitter, LinkedIn, Google My Business and Instagram.

Key capabilities of Zoho Survey

- Schedule posts based on flexible time
- Visualize the content pipelines with intuitive publishing mechanism
- Real time engagement with the audience
- Best in class analytics
- Monitor with core keywords, brand hashtags, product reviews
- Provides seamless integrations
- Offers collaborative tools

Core features of Zoho Survey

- Publishing Calendar
- Content Queues
- Curate Content
- Listening Dashboard
- Live Stream
- Roles & Permissions
- Stats and Analytics
- Facebook, Instagram Lead Ads Integration
- Social Media Analytics
- Custom Reports
- Schedule Reports
- Direct Messages
- Define Workflows



Website builder to create websites on the fly (Low-Code /No-Code)

<https://www.zoho.com/sites/>

Zoho Sites is a drag-and-drop website builder that helps users to create fully functional and visually appealing websites without writing code. It's a one-stop solution for both businesses and individuals who want to build a website with multiple pages, blogs, online forms, and more.

'No Code' technology lifts the weight of having to deal with heavy software, servers and other technical aspects of running a website. It helps to focus on putting effort into marketing and other avenues of growing your brand.

SEO tools, SSL Security, Blogging tools, Integrations, Social account integrations, Password protection, Analytics, Responsive design, Optional coding feature and user-friendliness makes Zoho Sites an ideal platform to build websites.

Key capabilities of Zoho Sites

- Pre-defined and Custom layouts of websites
- Customize its elements and sections with the style editor and numerous other options
- Provides Visual editor to instantly create the website without any code
- Seamlessly integrate with other applications
- Create responsive websites across devices & platforms
- Reach and expand business using websites
- Offers templates across domains & professions

Core features of Zoho Sites

- Drag & Drop Builder
- Elements
- Sections
- Dynamic Background
- HTML & CSS
- Auto Save
- Page Versions
- Audio & Video Snippets
- Blogs, Comments, Forms
- SEO, Traffic Analysis
- Responsive Templates
- Visual Editor
- SiteMap
- Hosting



Online store builder (Low-Code /No-Code)

<https://www.zoho.com/commerce/>

Zoho Commerce is a powerful cloud-based, no-code, ecommerce platform that enables B2B and B2C businesses to run their entire spectrum of operations on one platform. They can build their website from scratch, integrate payment gateways and shipping providers, launch their stores and start selling online. The platform also allows them to manage all incoming orders and customer communication, and automate the end user's journey through the shopping cart and beyond.

Finally, businesses can also expand and reach wider audiences thanks to seamless integrations on the marketing side for automated and live chat, email, Google Shopping, and Facebook Shop, among others.

Key capabilities of Zoho Commerce

- Provides pre-built industry based templates
- No code platform and drag & drop capabilities
- Seamless payment solutions
- Effective Order management, accounts, products, catalogs, pricelist and inventory
- Engage with customers within the same dashboard
- Seamless integration with sales, marketing and finance applications
- Fully customizable with HTML, CSS and other UI/UX standards

Core features of Zoho Commerce

- Pre-built Templates
- Custom Storefront
- Engaging Blogs
- Landing Page Builder
- Multiple Currencies
- Payment Solutions
- Ecommerce Sales Tax
- Integrations With Shipping, Payment Gateways, Marketing & Analytics
- Templates Across Domains
- Shipping & Delivery Management
- Product Management
- Customer Management



Online event management software to run smarter & better events

<https://www.zoho.com/backstage/>

Zoho Backstage is an event management software that empowers event organizers to plan and run conferences, meetups, and product launches with greater efficiency and impact. It provides the platform to host events online and virtually with Zoho Backstage OnAir with live cast of sessions, presentations, interaction with your attendees.

Core features of Zoho Backstage

- Website Builder For Events
- Attendees Engagement
- Configure, Sell & Track Tickets
- Marketing Events
- Change Notifications
- Audience Feedback
- Comprehensive Analytics
- Measure Affiliate Influence
- Sponsorship Management
- Virtual Events
- Zoom & Meetings Integrations

Customer Support & Services



Customer service/ticket management software
for context aware support

<https://www.zoho.com/desk/>

Zoho Desk is the industry's first context-aware help desk software that helps businesses focus on the customer. The important piece of desk management is the crucial information that all stakeholders in customer service require —agents, support managers and customers— to deliver or receive great support.

Key capabilities of Zoho Desk

- Helping customers find answers instantly through self-service
- Aggregating and helping manage conversations from multiple channels
- Providing service team with crucial customer context
- Enabling leaders to manage processes, fix bottlenecks, and create efficiency at scale
- Omnichannel customer service software to delight and retain customers
- Improve Agent productivity at scale
- Manage support & customer service without a glitch

Core features of Zoho Desk

- Ticket Management
- MultiChannel
- Multi-Department
- Knowledge Base
- Bots
- Auto Tag Tickets
- Sentiment Analysis
- Zia
- Embedded Self-Service
- Mobility
- Templates & Response Editors
- SLA, Escalations and Workflows
- Reports & Dashboards



Enterprise grade and secure unattended
remote access software

<https://www.zoho.com/assist/>

Zoho Assist empowers businesses across the globe with secure cloud-based remote support and remote access software to deliver top-notch customer support experience. It helps to establish secure web-based, on-demand connections with remote PCs, laptops, mobile devices, and servers with ease. Zoho Assist elevate the remote support experience with the industry's best remote support solution.

Key capabilities of Zoho Assist

- Provide attended remote support and remotely access computers
- Enterprise-grade security: TLS 1.2 and AES 256-bit encryption

- Establish remote PC access to troubleshoot faster and ensure customer satisfaction
- Empower IT help desk with remote desktop support software to resolve customers' issues remotely
- No prior downloads needed for on-demand remote sessions
- Privacy-focused

Core features of Zoho Desk

- Remote Support
- Instant Chat
- Schedule Sessions
- Voice & Video Chat
- Diagnostic Tools
- Session Recording & Confirmation
- Screen Sharing
- Action Log Viewer
- Web & Mobile Access
- Two-factor Authentication
- SL, 256-bit AES Encryption
- Custom Widgets & Rebranding
- Reports & Analytics

Finance & Operations



**Zoho
Books**

Powerful financial
platform

<https://www.zoho.com/in/books/>

Zoho Books is a comprehensive cloud financial platform that takes care of the business finance. It provide core features right from accounting, stock tracking, bank reconciliation, managing projects, to automating workflows and keeping the business GST compliant.

Key capabilities of Zoho Books

- End-to-End accounting software
- Makes invoicing and managing receivables effortless
- Send customized statements to your clients
- Receive payment in multiple currencies with our accounting software
- Helps to create estimates quickly and convert them into invoices
- Share recent transactions, accelerate estimate approval process, capture feedback
- Registered with GST Suvidha Provider (GSP)
- Connect with the IRP directly and create invoices

Core features of Zoho Books

- Receivables
- Create Retail Invoices
- Customized Invoice
- E-Invoicing
- Automate Follow-ups
- Accounting Client Portals
- Payment Process
- Connect, Import & Reconcile
- Create GST compliant invoices
- Audit Trails
- Reporting
- Documentation
- Online Payments
- Automations



Inventory management software
designed for Indian businesses

<https://www.zoho.com/in/inventory/>

Zoho Inventory is an online cloud based application which helps to manage the organization's inventory with ease. It offers a complete range of inventory management features right from item management, manage customer life cycle, vendor relationships, integrations, automations and smart features to make it a complete and enterprise level inventory software.

Key capabilities of Zoho Inventory

- End-to-End inventory software
- Generate package and real time shipping status
- Create Item grouping and bundles
- Manage stocks at multiple warehouse
- Convert sales order to invoices and tracks status without hassle
- Manage purchase order history & status
- Automate the process of receiving orders
- Track the movement of each item

Core features of Zoho Inventory

- Item Grouping
- Serial & Batch Tracking
- Multi Warehouse Management
- Sales Order Management
- Invoicing
- Packing & Shipping
- Vendor PriceList
- SKU Generator
- Purchase Order & Billing Solution
- Back Order & Drop Shipment
- Post Shipment Integration
- Marketplace and Shopping Cart
- EDI Integration
- Accounting Solution
- Barcode Scanning
- Reporting & Analytics



Professional invoicing software for small to large businesses

<https://www.zoho.com/in/invoice/>

Zoho Invoice is online invoicing software that helps you craft professional invoices, send payment reminders, keep track of expenses, log your work hours, and get paid faster.

Key capabilities of Zoho Invoice

- Create professional invoices
- Send invoices via email, SMS & client portals
- Enable localized payment gateway
- Collect recurring payments
- Effortlessly track time and bill invoices
- Access across devices & platforms
- Secured and ensures privacy

Core features of Zoho Invoice

- Build Client Portal
 - Track Unpaid Invoices
 - Payment Reminders
 - Credit Card Information
 - Payment Gateways
 - Project Estimates
 - Customize Invoice Templates
 - Schedule Invoice
 - Recurring Invoice
 - Multilingual Invoice
 - Invoicing Signing
 - Advanced Reporting & Analytics
 - Custom Fields
 - History
 - Auto-Charge
 - Run Reports
-



**Zoho
Expense**

Travel and expense management for growing businesses

<https://www.zoho.com/expense/>

Zoho Expense has helped tens of thousands of businesses streamline corporate travel, automate expense reporting, gain complete control over spending, and get crucial financial insights to stay two steps ahead. Zoho Expense enables to make online travel bookings and manage offline travel as well. It provides options to create detailed travel itineraries, set up and manage traveler profiles.

Key capabilities of Zoho Expense

- Set up multi-level, customized pre-travel approval flows
- Complete, end to end travel desk management
- Make online travel and hotel bookings and manage offline travel easily as well
- Audit expenses prudently and spot fraud with AI-driven insights
- Automate expense reporting and approvals
- Make reimbursements/ settlements online
- Create budgets and compare with actual spending
- Streamline spending with purchase requests
- Empower users to Autoscan receipts to create expenses automatically

Core features of Zoho Expense

- Receipt Management
 - Expense Management
 - Mileage Tracking
 - Simplified Approvals
 - Custom Approvals
 - Policies
 - Direct Feed Integration
 - Reimbursements
 - Travel Management
 - Expense Audits
 - Compliance
 - Automation
 - Corporate Card Reconciliation
 - Expense Report Management
 - Expense Report Automation
 - Expense Rules & Budget
-



Payroll crafted for building a better workplace

<https://www.zoho.com/in/payroll/>

Zoho Payroll is a cloud-based payroll processing software designed to transform the way the payroll is done over the years. It is tailored to fit the Indian statutory system with a refreshingly simple UI, Zoho Payroll is the de-facto choice for many businesses to streamline their payroll operations end-to-end.

Key capabilities of Zoho Payroll

- Increased efficiency
- In-built compliance
- Increased accuracy
- Effortlessly scalable
- Secure employee self-service
- Powerful administration tools
- Increased collaboration with other HR & Administration apps
- Decreased cost
- Decreased liability

Core features of Zoho Payroll

- Effortless Data Migration
- Employee Hikes, Increments & Appraisal
- Salary History
- Streamlined Employee Self-Service
- Systematic Employee Exit Management
- Automated Gratuity Settlement
- Powerful Administration
- Multiple Work Locations
- Personalized Salary Components
- Org wide Policies
- Roles & Permissions
- Approval Process & Automations
- Industry Specific Pay Schedule
- Custom Deductions
- Automated Compliances
- Form 16 & File IT returns

Human Resources



Cloud based complete HR Management solution

<https://www.zoho.com/people/>

Zoho People is a cloud-based HR software crafted to nurture employees, quickly adapt to changes, and make HR management agile and effective. Simplify your HR operations, retain talent, and build a high-performing workforce while putting employee experience first.

Key capabilities of Zoho People

- Core HR activities simplified
- Optimize time & attendance tracking
- Performance Management
- Secure employee self-service
- Increased Business agility
- Secured and Private

- Learning & Development
- Eliminate Paper process
- Advanced HR Analytics

Core features of Zoho People

- Recruitment
- Onboarding
- Employee Management
- Time-off Management
- Payroll Integration
- Corporate LMS
- Self-Service
- Documents Management
- Expense Management
- HR Analytics
- Case Management
- HR Bots
- Customization
- Performance
- Analytics
- Mobility



All-in-one talent acquisition solution

<https://www.zoho.com/recruit/>

Zoho Recruit offers a powerful ATS and CRM in a single recruitment platform, with scalability, customization, and remote hiring tools. Zoho Recruit has everything the staffing agency or internal HR team needs to match the right candidate for the right role.

Zoho Recruit is a world-class recruitment software that will help to find, evaluate, and communicate with candidates for any role. It make the hiring process efficient and brings in new hires to add more value to your organization and your clients.

Key capabilities of Zoho Recruit

- Automated hiring software
- Post jobs in multiple portals
- Build relationship right from recruitment
- Custom automation
- Manage contingent workforce
- Enhanced visibility to all job openings
- Exceptional candidate experience
- Design career pages
- Hiring pipelines

Core features of Zoho Recruit

- Candidate Sourcing
- Job Advertising
- Career Site
- Source Boosters
- Social Recruitment
- Video Interview
- Assessments
- Resume Management
- Employee Referrals
- Hiring Pipeline
- Background Screening
- Hiring Analytics
- BluePrints
- AI Recruitment
- Offer Letter
- Onboarding



Zoho Contracts

Comprehensive contract management solution

<https://www.zoho.com/contracts/>

Zoho Contracts is a feature-rich CLM platform that lets you streamline your contract processes and achieve compliance at scale with reduced costs.

Zoho Contracts improves the efficiency of the legal operations and holistically addresses contract management to facilitate better business outcomes. Its simple design, sophisticated features, and flexibility to scale make it a compelling solution for businesses of all sizes.

Key capabilities of Zoho Contracts

- Simple, yet comprehensive
- Predefined templates for contracts
- Built-in document editor
- Advanced document assembly capabilities
- Intuitive collaboration through track changes
- Effortlessly engage in multiple rounds of negotiations , contextual comments and versioning
- Legally bind signatures using Zoho Sign
- Design the approval workflows
- Centralized repository with proven security

Core features of Zoho Contracts

- Contract Templates
- Contract Authoring
- Approval Workflows
- Lifecycle Management
- Import Contracts
- Negotiations
- Reviews
- Digital Signatures
- Obligation Management
- Change Management
- Versioning
- Analytics
- Data Protection
- Mobile App



Zoho Mail

Secured business email solution for Organizations

<https://www.zoho.com/mail/>

Zoho Mail offers a secure and reliable business for your organizations. It helps to host the business emails through a secure, encrypted, privacy and ad-free services. Zoho Mail is a collaborative business communication platform for the modern workforce. It is a blend of the classic email and modern collaborative tools such as comments, likes, and sharing. Zoho Mail's data centers have top-notch security and surveillance, with a reliable 99.9% uptime. This provides secured email hosting that supports encryption both at rest and in transit, along with S/MIME message encryption.

Key capabilities of Zoho Mail

- Secured & reliable email for business
- Email @yourdomain
- Suite of applications
- Agile features for clean inbox
- Powerful control panel
- GDPR compliance
- 24x7 Support
- Hassle free migration
- Email on the go
- Extensive Integrations

Core features of Zoho Mail

- Email Suite
- Suite of Integrated Applications
- Collaborate
- Share
- Filters
- Advanced Search
- Signatures
- User Management
- Email Policies
- Two Factor Authentication
- Mail Suite Integrations
- Zaiper Integration
- Data Protection
- Mobile App

Office Suite



Collaborative Worksheet for creative workspace

<https://www.zoho.com/sheet/>

Zoho Sheet is an Office application that help to create spreadsheets, automate the data processor and share across teams and departments. Zoho Sheet is a cloud-based spreadsheet application that allows to create, share, and work together on spreadsheets online or offline.

Zoho Sheets would help Government Organizations to seamless use and automate several office related process/documents. It helps to analyze, visualize and publish data using Zoho Sheet across multiple devices and browsers.

Zoho Sheet is built as an interactive applications and offers intuitive interfaces with dropdowns, menus, conditional format, date picker and many more option than the conventional Excel spreadsheet.

Key capabilities of Zoho Sheet

- Collaborative spreadsheet
- Provides access across devices & platforms
- Automate the data flow using custom functions
- Secure the sheet using access controls
- 40+ chart types and dynamic pivot table builder
- AI-powered assistant
- remove inconsistencies by automating the data process
- AI powered assistant using Zia

Core features of Zoho Sheet

- Collaboration
- Cell/Range Specific Lock Setting
- Vibrant Charts
- 350+ predefined functions
- Basic to Complex Functions
- Data Cleansing
- Data Validations
- Record Macros or Use VBA Code
- Multiple File Formats
- Check-in/Check-out Capability
- Audit Trail
- Version Control
- Publish Sheets
- Mobile App



Online meeting software for all your video conferencing & webinar needs

<https://www.zoho.com/meeting/>

Zoho Meeting is a versatile web conferencing tool for hosting online meetings and webinars. It is a web-based tool that lets the user host and attend online meetings and webinars without downloading any software.

It enables to conduct meetings and webinars with audio and video, and share your screen or application window in real time to deliver presentations or demos, record the meetings and webinars, play and share them online, or download them. If poor internet stops you from connecting from remote areas, user can use dial-in numbers to join meetings and webinars over your phone.

Key capabilities of Zoho Meeting

- Schedule a meeting, or meet instantly
- Collaborate with video conferencing and screen sharing
- Send invitations with RSVP
- Embed meeting links on your website
- Add meetings to your calendar and get reminders
- Play, share, and download recordings
- Lock meetings for security
- Communicate through chat
- Organize webinars and engage up to 3000 attendees
- Industrial standard security

Core features of Zoho Meeting

- Conduct Video Meetings
- Share Screen
- Record & Share Web Meetings
- Protect & Moderate Meetings
- Webinar Solutions
- Interact with Audience
- Webinar Data & Downloads
- Organization Management
- Custom Registrations
- Phone Dial-Ins
- Engaging Webinars
- Analytics
- Security & Privacy
- Mobile App



Team communication & collaboration business software

<https://www.zoho.com/en-in/cliq/>

Zoho Cliq is a web-mobile based chat and messaging software that gives the ability to have a direct chat, audio call, file sharing, screen sharing, video call with another users or with several users/members in a chat room or channel within the organization. Zoho Cliq simplifies your team communication with organized conversations, easy-to-find information, and connections to the tools at ease.

Key capabilities of Zoho Cliq

- Group collaboration made simple
- Increase in transparency & visibility
- Team calls in one-tap
- Centralize the workflows
- Check-in to work through Cliq
- Instant virtual meetings
- Share ideas on whiteboard
- Team mobility with screen sharing
- Stay better connected with team
- Foster effective team collaboration

Core features of Zoho Cliq

- Multiple Conversations
- Multi-view Chats
- Connect Over Chats, Calls or Share Screen
- Create Channels
- Organized Chats
- Record calls & Meetings
- Collaborate Whiteboards
- Interactive Gestures, Polls
- Threaded Conversations
- Remote Check-in
- Host Big Conferences
- Manage Project From Single Interface
- Taz - ChatBots
- Mobile App



Online file management software for teams and organizations

<https://www.zoho.com/workdrive/>

Zoho WorkDrive is an online file management solution for teams that work together. It provides a secure, shared workspace and helps to create, collaborate, make teamwork happen and supports 200+ file formats. Zoho WorkDrive allows to store your files, and collaborate securely on the cloud. The team can easily create documents, spreadsheets, and presentations using Zoho's built-in office suite (Zoho Writer, Zoho Sheet, and Zoho Show).

Key capabilities of Zoho Wordrive

- Shared workspace for team
- Centralized Repository & Document Management System
- Organize & manage files for seamless collaboration
- Provides data templates
- Admin Console
- Secured external sharing with permissions
- Advanced analytics

- Customizable reports
- File management & collaboration for different teams, industries and business sizes
- Meets industry standard of SOC 2 Type II and ISO 27001
- Embedded with Zoho Office Suite

Core features of Zoho Workdrive

- Team Folders
- Role-based Access
- Instant Notifications
- Writer
- Sheet
- Show
- Version History
- Monitor Team's Activities
- Data Management
- Data Discovery
- Files/Folder Categorization
- Prevent Data Clutter
- Advanced Analytics
- Intelligence Reports

Business Process Platform

(Low-Code/ No-Code Platform)



Build powerful custom low code applications

<https://www.zoho.com/creator>

Zoho Creator is a low-code application development platform that allows users to create custom applications on their own, with minimal coding experience.

The intuitive drag-and-drop interface empowers developers and business users to build web and mobile applications that satisfy all their unique requirements with ease. It is a cloud software to create custom applications on your own without any prior coding experience or IT expertise.

Zoho Creator's drag-and-drop interface enables the user to create custom business applications in days rather than weeks. User can collect data, automate business processes or workflows, analyze the data in reports, and collaborate with your application users.

Zoho Creator lets you concentrate on automating your business process without worrying about maintenance, hosting, and scalability. With our native mobile apps, you can access real-time data from anywhere, anytime and on any device.

Key capabilities of Zoho Creator

- Turn ideas into apps, visually
- Add AI without Coding
- Build apps across devices
- 600+ predefined apps integration
- Model app and data flows
- Automate Process visually
- Real time conversational analytics
- Build apps from simple to complex
- Import data from apps
- Multi source data visualization

Core features of Zoho Creator

- Rapid Development
- Highly Scalable
- Offline Access
- Custom Domain
- Built-in Authentication
- Automated User Management
- OCR Recognition
- Zero Backend Configurations
- Drag & Drop Builder
- Augmented Analytics
- No-Code AI Builder
- Sentiment Analysis
- Secured Collaboration
- Visual Process Builder
- Cloud Infrastructure
- Easy Governance



Modern self-service BI and Analytics platform

<https://www.zoho.com/analytics/>

Zoho Analytics is a self-service BI and data analytics application that lets you visually analyze your data, create stunning data visualizations and discover hidden insights in minutes. Zoho Analytics turns raw data into insightful reports and dashboards and helps to track key business metrics, review trends, identify outliers and predict the future.

According to TEC's latest report "2021 TEC INSIGHT REPORT FOR BI AND ANALYTICS SOLUTIONS", Zoho Analytics has been ranked among the leaders in the competitive BI & Analytics space, leading in various categories like analytics functions, data visualization and discovery, dashboards, scorecards and reporting, UX and Security features. TEC says, "From an UX perspective, we can see that Zoho Analytics leads across all aspects of user experience (UX) examined in this survey, from technical to licensing."

Key capabilities of Zoho Analytics

- Connect & blend data from any source
- Prepare data for analysis
- Augment analysis using AI
- Visually analyze the data
- Cloud & On-premise BI solution
- Share insight with stakeholders
- Unified & Embedded BI
- High Scale and extensible platform
- Highly secured

Core features of Zoho Analytics

- Data Integrations
- Auto Model
- Smart Cleanse
- Visual Analysis
- Share Reports & Dashboards
- Dynamic & Interactive Visualization
- Smart Data Blending
- Conversational Analytics
- Zia Insights
- Predictive Analytics
- Data Alerts
- Drag & Drop
- Access Control
- Web Portal
- Easy Connectors
- Reports & Dashboards
- Pre-built Analytics
- Mobile App
- Self-service Analytics Portal
- Augmented BI



Augmented self-service data preparation tool

<https://www.zoho.com/dataprep/>

Zoho DataPrep is a self-service data preparation and a cleansing tool with intuitive design and compelling features. It is a data preparation tool that helps to connect, explore, transform, and enrich data for analytics, machine learning, migration, and data warehousing. It provides consistent and fast results to help achieve data integration and consolidation in your organization.

The laborious tasks involved in data preparation are made simple and effective, right from importing data to scheduling for export. The application boasts powerful features such as live preview of your data operations, a timeline of the previous states of your data, actionable insights on data quality, and more. DataPrep uses machine learning technologies to predict users' needs and deliver intelligent suggestions.

Key capabilities of Zoho Creator

- Prepare data from multiple source
- Analyze and improve data quality
- Transform and enrich
- Manage and catalog the data
- Augmented data preparation
- Brings unstructured data into fold

Core features of Zoho Creator

- Multi File Formats
- Cleanse via Analytics
- Smart Modelling
- Automatic Notifications
- Import Database & Data Warehouse
- Data Distribution
- Transform
- Automate End-to-End Pipeline



Online project management software

<https://www.zoho.com/projects/>

Zoho Projects is a comprehensive & cloud-based project management software that helps to plan the projects, track work efficiently, and collaborate with your team, across multiple locations.

Zoho Projects is a comprehensive solution that will help to solve day-to-day problems in project management and add value to their business by leaps and bounds, by creating project management efficiencies, portfolio management efficiencies, data collection, tracking and reporting for the organization.

Zoho Projects provides an initiative and easy to use interface that will enable the project management team to plan its Programs & Projects, closely track its tasks, collaborate with teams efficiently and finish successful projects with ease. Zoho Projects is an enterprise-ready tool that is highly scalable and secure.

Key capabilities of Zoho Projects

- Effectively plan the projects
- Build the plans using Gantt charts
- Provides intuitive user interface
- Effective collaboration between team
- Automate task process
- Prioritization of tasks
- Resource allocations
- Hybrid models

Core features of Zoho Projects

- Issue Management
- Gantt Charts
- Task Views
- Sprints
- Layouts
- Customization
- Feeds & Chats
- Blueprints
- SLA
- Business Rules
- Timesheets
- Budgeting
- Invoicing
- Automation
- Work Breakdown Structure (WBS)
- Portfolio Dashboard
- Project Dashboard
- Project Baselines
- Earned Value Management
- Issue Reports
- Task Reports



Online Agile project management software

<https://www.zoho.com/sprints/>

Zoho Sprints is an agile project management tool that helps teams adopt an iterative and collaborative approach to work.

Zoho Sprints transforms the way of work and helps in dealing with efficiently managing the projects. It helps the teams to view work items in their backlog, plan a new sprint, and track sprint progress on Scrum boards.

It keeps the details of the project in sync across different modules, providing the context needed to collaborate with cross-functional teams. Agile teams use burn up and burn down charts to track their sprint progress. The enhanced reports & dashboards offers a bird's-eye view of your milestones, task lists, tasks, and sprints.

Key capabilities of Zoho Sprints

- Build products in Sprints
- Bring remote teams closer & collaborate
- Increased transparency and productivity
- Effective release management
- Track the progress
- Seamless integrations with other tools
- Mobile based access
- Hybrid models

Core features of Zoho Sprints

- Backlogs
- Boards
- Epics
- Work Item Management
- Sprints
- Release Management
- Jenkins Integration
- Integrations
- Burn up & Burn down Charts
- Velocity Report
- Cumulative Flow Diagram
- Meetings
- Feeds
- Customization
- Timesheets
- Mobility

Associated Services

The following services/features are included within Zoho One service

Mobile APP

The Zoho One mobile app offers several exciting features for admins. First, a unified admin panel gives administrators the ability to manage their entire business from their mobile device, and the app launcher lets users access all of their work-related apps. It also lets you search for data across Zoho apps, manage admin functions, and customize security policies for your users.

As a Zoho One administrator, you can onboard users, control and monitor app access, and administer security policies.

Artificial Intelligence

At Zoho One, we embrace innovation. Zia, Zoho's AI assistant, was made in-house for Zoho products. Its new integration with OpenAI now makes content generation, business communication, workflow automation, customer relations, and support effortless.

Zoho One acts as the hub for all your business processes, facilitating marketing, CRM, accounting, customer support, productivity, finance, collaboration, and human resources. A virtual assistant like Zia elevates your Zoho One experience by automating tasks efficiently using OpenAI integrations.

Government organisations and public sectors can incorporate Zia's generative AI into their Zoho ecosystem. Here is how,

CRM

Managing customer relations and engagement often deals with drafting personalized emails for a particular client and may be crucial for securing a deal or contract. You can leave the heavy lifting to Zia for drafting complete emails, improving existing content, and creating custom email templates to maximize your results.

Analytics and BI

Converse with and ask Zia to generate actionable insights from raw data and obtain KPIs and data visualization with easy queries.

- Create custom formulas.
- Import public datasets and manage data by generating SQL queries.
- Use Ask Zia to predict future trends with Zia's predictive analysis.
- Generate instant queries and transform existing tables.

Business communication

Zia can be a lifesaver when it comes to business communication by assisting in messages, calls, and meetings. With Zia's AI assistance, you can now:

- Translate messages automatically.
- Summarize unread messages.
- Generate an image with query.
- Generate instant emails.
- Detect speech and change backgrounds or add filters during calls.

Users can also leverage OpenAI's functionalities using the ChatGPT extension in Cliq to access special bots, commands, and message actions.

Customer service and support

Customer service can be a delicate task which can get tiring at times. Using Zia and generative AI, you can maximize productivity, increase the quality of customer conversations, and provide an overall great customer experience by:

- Summarizing conversations automatically.
- Writing compelling conversations using writing assistants.
- Creating auto-tags to contextually generate tags for better record-keeping.
- Crawling your knowledge base for articles and providing instant replies.
- Using sentimental analysis to understand the customer and respond promptly.

Content creation

Spark your creativity using Zoho Social with Zia, powered by generative AI. Maintaining a content calendar and keeping up with the dates can be challenging, especially for research and content creation.

With Zia, you can meet your deadlines, keep up with current trends, and produce compelling and relevant social media content. Zia can do this instantly by:

- Generating content for you based on a particular subject or keyword.
- Suggesting relevant pictures to add to a post.
- Suggesting appropriate hashtags for your posts.
- Rephrasing and streamlining content for you.
- Providing different variations of content.

Webpage content management

Create new exciting landing pages and customize existing ones in Zoho LandingPage using Zia's generative AI to suit all your marketing campaigns.

- Reduce dependencies on writers and designers.
- Optimize content using regenerative suggestions.
- Generate landing page copies from scratch.

Use Zia for better business communication, managing customer relations, analyzing key business metrics, creating content that fits your organization's persona, generating custom landing pages for campaigns, and to make everyday tasks easier. Let us know if you have tried these tips out already or if you discovered more!

Integration Approach

The third party systems integrations with Zoho One shall be based on REST APIs and the availability of REST API from third party systems are critical for the integration. Zoho shall analyse the API documentation of third party systems and build the integration for Create, Read or Update operations in the third party systems from Zoho. Similarly, Zoho shall share the details of API documentation with authentication details for third parties to access Zoho CRM for Create, Read, Update or Delete operations.

Classic Support

With a paid subscription to Zoho One, buyers automatically receive Classic support. They can reach our support team via email, phone, or chat, and even schedule remote assistance sessions. Please note, buyers cannot purchase any support services as a standalone service.

Support services are provided only on paid subscription of Zoho One.

The following services are excluded from the listed Zoho One service, however it can be availed through add-on pricing. Please refer to our pricing document for details into add-on pricing.

- Professional Services: Zoho Provides professional services called Zoho Jumpstart for Zoho One. Zoho Jumpstart is an in-house team of Zoho product experts who implement Zoho solutions based on the customer's specific business requirements.
- Training: Zoho's training and certification platform called 'Zoho Spark' gives access to specialised programs designed to enhance Zoho's product knowledge and convey best practices for our comprehensive suite of apps.
- Premium Support & Enterprise Support plans can be availed at additional costs.

For any Add-Ons (additional files storage, API credits etc.,)

– Please refer our pricing document.

DATA PROTECTION

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Information Assurance

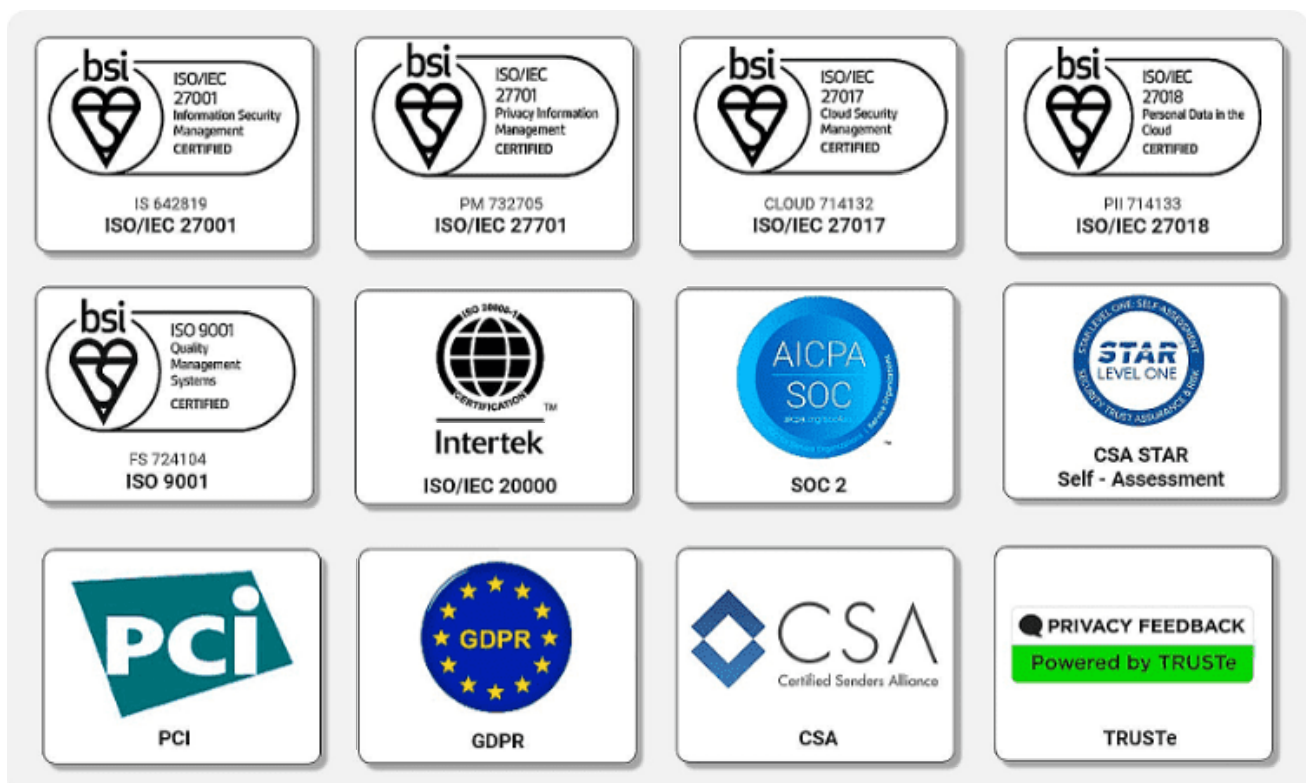
The security practices outlined encompass the entire development and operational life cycle, ensuring the protection of customer data at every stage. A stringent change management policy governs all application changes, requiring authorization before implementation in production.

The Software Development Life Cycle (SDLC) mandates adherence to secure coding guidelines, with code changes screened for potential security issues using analysers, vulnerability scanners, and manual review processes.

The security framework, aligned with OWASP standards, operates at the application layer and addresses threats such as SQL injection, cross-site scripting, and application layer DOS attacks. The cloud infrastructure, responsible for distributing and maintaining customer cloud space, employs secure protocols to logically separate each customer's service data, preventing unauthorized access.

Data ownership is emphasized, with customer data stored on servers without sharing with third parties without consent. During data transmission, strong encryption protocols, including TLS 1.2/1.3, secure web access, API access, mobile apps, and email client connections. Support for Perfect Forward Secrecy (PFS) ensures future compromises won't decrypt past communications.

Certifications



HTTP Strict Transport Security (HSTS) is enabled for web connections, directing modern browsers to connect only over encrypted connections. Additionally, authentication cookies are flagged as secure. At rest, sensitive customer data is encrypted using 256-bit AES, with key management handled by an in-house Key Management Service (KMS). Further security layers include encrypting data encryption keys with master keys, physically separating master keys, and restricting access to different servers.

Overall, the comprehensive security measures underscore a commitment to safeguarding customer data throughout its life cycle.

Zoho has a dedicated compliance team to review procedures and policies to align them with standards, and to determine what controls, processes, and systems are needed to meet the standards. This team also does periodic internal audits and facilitates independent audits and assessments by third parties.

Data Back-Up and Restriction

We run incremental backups everyday and weekly full backups of our databases using Zoho Admin Console (ZAC) for Zoho's DCs. Backup data in the DC is stored in the same location and encrypted using AES-256 bit algorithm. We store them in tar.gz format. All backed up data are retained for a period of three months. If a customer requests for data recovery within the retention period, we will restore their data and provide secure access to it. The timeline for data restoration depends on the size of the data and the complexity involved.

To ensure the safety of the backed-up data, we use a redundant array of independent disks (RAID) in the backup servers. All backups are scheduled and tracked regularly. In case of a failure, a re-run is initiated and is fixed immediately. The integrity and validation checks of the full backups are done automatically by the ZAC tool.

We hold the data in your account as long as you choose to use Zoho Services. Once you terminate your Zoho user account, your data will get deleted from the active database during the next clean-up that occurs once every 6 months. The data deleted from the active database will be deleted from backups after 3 months. In case of your unpaid account being inactive for a continuous period of 120 days, we reserve the right to terminate it after giving you prior notice and option to back-up your data.

A verified and authorized vendor carries out the disposal of unusable devices. Until such time, we categorize and store them in a secure location. Any information contained inside the devices is formatted before disposal. We degauss failed hard drives and then physically destroy them using a shredder. We crypto-erase and shred failed Solid State Devices (SSDs).

Business continuity statement / plan

Application data is stored on resilient storage that is replicated across data centres. Data in the primary DC is replicated in the secondary in near real time. In case of failure of the primary DC, secondary DC takes over and the operations are carried on smoothly with minimal or no loss of time. Both the centres are equipped with multiple ISPs.

We have power back-up, temperature control systems and fire-prevention systems as physical measures to ensure business continuity. These measures help us achieve resilience. In addition to the redundancy of data, we have a business continuity plan for our major operations such as support and infrastructure management.

Privacy by Design

Zoho Corporation handles user information, emphasizing the collection of only necessary data. User information is obtained through direct input, automated logging during website/software usage, and indirect sources, such as referrals or social media interactions. Zoho uses collected information to provide requested services, maintain accounts, communicate with users, and improve products. Legal bases for data collection include user consent, necessity for service provision, or legitimate business interests. Users can decline certain data uses by not providing information or opting out later. Access to personal information is restricted to employees and contractors with legitimate needs. Data subjects in the European Economic Area (EEA) are granted specific rights.

Regarding service data processed on behalf of users, Zoho ensures data protection, limited access, and processing according to user instructions. Users own their service data and can access, share, export, or request deletion of it. Data is retained during active account use and automatically deleted after account termination.

Privacy limitations include disclosure for legal obligations, fraud prevention, agreement enforcement, or user safety. Zoho does not currently honour Do Not Track signals and follows third-party privacy policies. Users can contact Zoho for privacy-related queries, GDPR-compliant Data Processing Addendum requests, or to address concerns about personal data collection from minors. Major changes to the privacy policy will be communicated to users. In summary, Zoho prioritizes data protection, user control, and transparency throughout the data life cycle, from collection to processing and deletion.

USING THE SERVICE

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Ordering and Invoice

The paid subscription of Zoho One can be availed from Zoho Corporation Limited by contacting our team to discuss your requirements in detail. They will guide you through the ordering process and provide any necessary assistance in completing the Order Form (Call-off contract). We accept payment via Visa, MasterCard, American Express, and PayPal.

We also accept payment via bank transfer or check transfer for yearly subscriptions. We strive to make the ordering and invoicing process as smooth as possible, ensuring that you have a clear understanding of the fees and payment terms. More details can be requested from sales@eu.zohocorp.com.

Availability of Trial Service

Zoho One has a 30-day free trial period. It includes 40+ integrated business applications with full access to all premium features.

At the end of your 30-day trial, you can either purchase a subscription plan or deactivate your account.

1. If you purchase a Zoho One subscription, your data and configurations remain intact, and you can continue using Zoho One.
2. If you deactivate your Zoho One account, you can still access the free plan of Zoho One's individual applications.

Associated Services

On availing of our premium or enterprise support services at additional cost (please refer to our pricing document), we assign a dedicated point of contact who will provide assistance throughout the on-boarding phase. They will be available to answer any questions, provide guidance, and ensure a seamless on-boarding experience as per the customer's requirements. It is the choice of the buyer to avail of premium or enterprise support services at additional costs, however, a Classic support service would be provided at free of costs along with a paid subscription of the Zoho service. Please refer to our pricing document for more details on the features availed in different support plans.

During the on-boarding process, we provide comprehensive documentation that guides users through the setup and configuration of Zoho One. This documentation includes step-by-step instructions and troubleshooting tips.

When users decide to stop using Zoho One, the offboarding process is handled in a similar manner. Users can reach out to their dedicated point of contact to initiate the offboarding process. Zoho One ensures that all customer data is securely transferred or deleted according to the user's preferences. The offboarding process may also include providing guidance on migrating data to another system or exporting data for archival purposes. Zoho One aims to make the transition out of the service as smooth as possible, ensuring that users have the necessary support and resources during this phase.

Training

Zoho One offers various training facilities to help users get started and make the most of the service. The training facilities include online help and assistance, which provide users with access to comprehensive documentation, tutorials, and guides. These resources are designed to facilitate orientation to the new service and help users understand its features and functionalities.

Additionally, Zoho One may provide introductory or onboarding services (at additional costs; please refer to our pricing document) to further support users during the initial stages of using the service. These services may include personalized training sessions, on-site visits, or dedicated support from a customer success manager. The goal is to ensure that users have the necessary training and support to effectively utilize Zoho One.

Implementation Plan

Include the following statement: "A detailed implementation plan can be provided to the buyer on request". Zoho will coordinate with the buyer for the integration and onboarding of Zoho One. Features of our delivery methodology:

- Collaborative session to define the scope and requirements such that the objectives are well stated and prioritized
- Model that encourages flexibility, continuous learning and cross training
- Collaborative approach between Zoho and buyer teams
- Multiple opportunities to provide feedback to the solution

Adherence to meeting schedules and timely feedback to queries

Discovery Phase

The implementation team will collaborate along with buyer's key stakeholders or point of contacts to elicit the requirements, understand the process, identify & define the ecosystem and dependencies, prioritize the objectives based on goals and plans.

The key objectives of this activity would be to gain a detailed understanding of the following

- Core objectives and the priorities
- Understanding of the ecosystem
- Understanding of the short term and long term priorities
- Understanding of the dependencies
- Plan for the integration and onboarding
- Plan for support

Integration and Testing (Integration & User Acceptance)

Testing will be an integral part of the implementation and onboarding of the users. Once the initial test setup is created, buyer's can invite staff, users and also set up integrations to see how they work and process.

The testing phase will cater for,

- Creating a test environment/test account.
- Perform data for test environment
- Testing the processes using relevant security (User IDs, roles, and permission lists)
- Conduct training for the users
- Conduct User Acceptance testing
- Support to onboard users, admins, define roles and initial set up
- Plan to rollout Zoho One to a larger set of users of buyer

The overall timelines will be planned based on the availability and integration timelines of the buyer.

A detailed implementation plan can be provided to the buyer on request.

Service Management

We have a dedicated incident management team. We notify you of the incidents in our environment that apply to you, along with suitable actions that you may need to take. We track and close the incidents with appropriate corrective actions. Whenever applicable, we will identify, collect, acquire and provide you with necessary evidence in the form of application and audit logs regarding incidents that apply to you.

Furthermore, we implement controls to prevent recurrence of similar situations.

We respond to the security or privacy incidents you report to us through incidents@zohocorp.com, with high priority. For general incidents, we will notify users through our blogs, forums, and social media. For incidents specific to an individual user or an organization, we will notify the concerned party through email (using their primary email address of the Organisation administrator registered with us).

Breach notification

As data controllers, we notify the concerned Data Protection Authority of a breach within 72 hours after we become aware of it, according to the General Data Protection Regulation (GDPR). Depending on specific requirements, we notify the customers too, when necessary. As data processors, we inform the concerned data controllers without undue delay.

Availability of Zoho services & history of incidents can be viewed by customers in the following link,

<https://status.zoho.eu/>

Service Constraints

Such as performance, availability and support hours, maintenance windows, level of customisation permitted, schedule for deprecation of functionality/features etc.

Zoho One is hosted on Zoho's own public cloud & cannot be hosted privately

The features that are available within each application of Zoho One bundle can be verified in the Plan details page of Zoho One service

Service Levels

Service Levels (e.g. performance, availability, support hours, severity definitions etc.) Perhaps you are able to discuss and agree appropriate service levels and reach agreement prior to an order being placed (which would then be documented in the Order Form as agreed between both parties).

Customer Interaction Flow

Customer will reach the Support Team via support Call/ chat/ email and create ticket.

Request will be validated & maintained in Zoho One. Based on the type (feature request/issues/backend changes) it is actioned accordingly.

Issues requiring developer attention will be debugged by SDE (Support Debug Engineer) team.

The SDE owner will debug the issue further and revert with the reason & the solution will be conveyed to the customer by support engineer

The severity level of the issues will be categorised as below,

- Severity Level 1: The Zoho Service does not function without a fix being applied and the problem has significant effect on the revenues or business operations of Subscriber.
- Severity Level 2: The Zoho Service can function. However, the Zoho Service functions providing incorrect results, or its performance is inconsistent with the performance described in the Documentation.
- Severity Level 3: The functionality of the Zoho Service is not affected by the problem or can be achieved by using other features of the Zoho Service.

Escalation Procedure

Our dedicated classic support team is available 8 hours per day (UK Time), 5 days per week, however Zoho also offers 24/5 & 24/7 support services at additional costs (Please refer pricing document)

Seurity Level	Response	Problem Determination	Resolution/Restoration/ Workaround
1	1 hour	4 hours	8 hours
2	8 hours	2 days	4 days
3	24 hours	7 days	14 days

If the above matrix is not matched or if the customer feels delay in response, they can drop an email to support-escalation@zohocorp.com

Outage and Maintenance Management

Planned Outages & Maintenance

The planned outages would be announced/informed to the customers through several channels,

- Blog post in community forum
- Business emails
- Banners in respective services

Generally, annual maintenance activities would be planned during non-business hours to avoid impact to the services.

Unplanned Outages:

Major unplanned outages will be posted in social media forums & also will be informed to customers through emails.

Customers can always refer to the following link on the health status of each service & update on outages.

<https://status.zoho.eu/>

Financial recompense for not meeting Service Levels

At Zoho, we understand the importance of meeting service levels and ensuring customer satisfaction. We are committed to delivering a high-quality service and addressing any issues promptly. If there are concerns about service levels not being met, we encourage customers to contact our exclusive support team, who works round the clock to discuss the situation and find a suitable resolution.

Our goal is to work closely with our customers to ensure their needs are met and provide the best possible service experience. However, in the event of a service default from our end, upon detailed analysis, customers will be compensated with Service Credits.

Monthly Uptime Commitment

On-Demand Services will have a Monthly Uptime Percentage of 99.9%.

Calculation of Service Credit & Compensation for Downtime (No of days of Service Credit)

Uptime 99.5% to 99.9% :	7
99% to 99.5%:	15
<99% :	30

Request for Service Credit

In order to receive any of the Service Credits described above, Subscriber must notify Zoho within thirty (30) days from the time Subscriber becomes eligible to receive a Service Credit. Failure to comply with this requirement will result in forfeiture of Subscriber's right to receive a Service Credit. Maximum Service Credit. The aggregate maximum number of Service Credits to be issued by Zoho to Subscriber for any and all Downtime Periods that occur in a single calendar month shall not exceed thirty days of Service added to the end of subscription term. Service Credits may not be exchanged for, or converted to, monetary compensation. Sole and Exclusive Remedy. Subscriber's sole and exclusive remedy for Zoho's failure to meet the uptime commitment is to receive Service Credit.

SLA Exclusions

The SLA does not apply to any performance and availability issues: (i) caused by factors outside of Zoho's reasonable control; (ii) that resulted from any actions or inactions of Subscriber; or (iii) that resulted from Subscriber's equipment and/or third party equipment that are not within Zoho's reasonable control. It is hereby clarified that performance and availability issues caused by factors within Zoho's control and attributable to Zoho or its vendors are not excluded.

Terms

- "Downtime" shall mean inability to access On-Demand Services due to a Qualifying Fault. Downtime is measured based on availability of the individual On-Demand Services as measured by Zoho's application monitoring tool.
- "Qualifying Fault" shall mean and include server side errors and reachability errors attributable to On-Demand Services.
- "Downtime Period" shall mean ten or more consecutive minutes of Downtime. Intermittent Downtime for a period of less than ten minutes will not be counted towards any Downtime Periods.
- "Monthly Uptime" shall mean total number of minutes in a calendar month minus the number of minutes of Downtime suffered from all Downtime Periods in a calendar month.
- "Monthly Uptime Percentage" shall mean the percentage calculated by dividing Monthly Uptime by the total number of minutes in a calendar month.
- "Scheduled Downtime" shall mean unavailability of On-Demand Services about which Subscriber is informed at least forty eight (48) hours in advance. A Schedule Downtime will not constitute a Qualifying Fault.
- "Service Credit" shall mean days added to the end of the Subscription Period at no additional cost as compensation for Zoho's failure to meet the monthly uptime commitment.

PROVISION OF THE SERVICES

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Customer Responsibilities

- Choose a unique, strong password and protect it.
- Use multi-factor authentication
- Use the latest browser versions, mobile OS and updated mobile applications to ensure they are patched against vulnerabilities and to use latest security features
- Exercise reasonable precautions while sharing data from our cloud environment.
- Classify your information into personal or sensitive and label them accordingly.
- Monitor devices linked to your account, active web sessions, and third-party access to spot anomalies in activities on your account and manage roles and privileges to your account.
- Be aware of phishing and malware threats by looking out for unfamiliar emails, websites, and links that may exploit your sensitive information by impersonating Zoho or other services you trust.
- From your end, we strongly recommend scheduling regular backups of your data by exporting them from the respective Zoho services and storing it locally in your infrastructure.

Technical and Client-side Requirements

System Requirements

Zoho One is compatible with basic system configuration, the details of which are listed below-

Operating System	Windows, Linux and Mac OS X
Web Browser	Safari 13 & above, Google Chrome 73 & above, Mozilla Firefox 69 & above, Microsoft Edge 79 & above, Opera 60 & above
Other Requirements	Enable JavaScript, Cookies Install Acrobat Reader (Optional), Install Zoho Spreadsheet Viewer (Optional)

Supported Devices

The Zoho One Mobile App is available on Android and iOS devices, and can be downloaded from Google Play and the App Store. It's also available as mobile web in supported mobile browsers.

Operating System	Version
Android	5.0 and above
iOS	10.0 and above
Mobile Web	
Android	Chrome (recommended)
iOS	Safari (recommended)

Outcomes/ Deliverables

Implementing Zoho One can indeed offer a multitude of outcomes and deliverables for businesses, enhancing efficiency, productivity, and overall performance. Here are some of the main outcomes and deliverables that you can expect

Streamlined Operations

Zoho One integrates various business applications seamlessly, allowing for streamlined operations across departments. This consolidation reduces the need for multiple disjointed systems, leading to smoother workflows and improved collaboration.

Centralized Data Management

With Zoho One, businesses can centralize their data management efforts. This means all relevant information, including customer data, sales figures, and project details, can be stored and accessed from a single platform, enhancing data consistency and accessibility.

Improved Collaboration

Zoho One offers collaboration tools such as Zoho Projects, Zoho CRM, and Zoho Connect, facilitating better communication and teamwork among employees. Features like file sharing, task assignment, and real-time messaging enable teams to work together more effectively, regardless of their physical location.

Cost Savings

Implementing Zoho One can lead to cost savings for businesses. Instead of purchasing and maintaining multiple standalone applications, businesses can leverage the comprehensive suite of tools offered by Zoho One at a more affordable price point. Additionally, the scalability of Zoho One allows businesses to adjust their subscription based on their evolving needs, further optimizing costs.

Data-driven Insights

Zoho One provides analytics and reporting tools that offer valuable insights into various aspects of the business, such as sales performance, customer behavior, and project profitability. These insights empower businesses to make data-driven decisions, identify areas for improvement, and capitalize on opportunities for growth.

Compliance and Security

Zoho takes data security and compliance seriously, offering robust security measures and adhering to industry standards and regulations. Implementing Zoho One can thus provide businesses with peace of mind regarding the protection of their sensitive information and adherence to relevant compliance requirements.

Overall, implementing Zoho One can yield numerous benefits for businesses, ranging from improved efficiency and collaboration to cost savings and enhanced customer engagement. By leveraging the comprehensive suite of tools offered by Zoho One, businesses can optimize their operations, drive growth, and stay competitive in today's dynamic business landscape.

Apart from the benefits mentioned above, buyers also get public access to all the resources – user guide, admin guide, webinars & training videos. Please refer Zoho One website page to access these resources.

Enhanced Customer Engagement

Zoho One includes customer relationship management (CRM) tools like Zoho CRM and Zoho Desk, enabling businesses to better engage with their customers. By centralizing customer data and providing tools for efficient communication and support, businesses can deliver a more personalized and responsive customer experience.

Increased Productivity

By automating repetitive tasks and providing intuitive interfaces, Zoho One helps boost employee productivity. Features like workflow automation, project management tools, and collaboration platforms enable employees to focus on high-value tasks, resulting in increased efficiency and output.

Data-driven Insights

Scalability and Flexibility: Whether a business is a small startup or a large enterprise, Zoho One offers scalability and flexibility to accommodate diverse needs. As the business grows or evolves, additional applications and features can be easily integrated into the existing infrastructure, ensuring that Zoho One remains aligned with the business's requirements.

Development cycle of the Solution

Zoho One undergoes a hybrid (both Agile & Waterfall) development, validation, release, and support process.

Roadmap

Ideas for features are collected from market analysis and customer feedback to create a yearly roadmap.

Validation

Multiple stages of validation, including unit, internal, and quality analyst validations, ensure product quality before release.

Release

Marketing team prepares release notes and guides while the product undergoes security scanning. Upon approval, the release goes live, and we update product web pages and marketing materials.

Throughout the process, collaboration between different teams ensures a smooth and successful product lifecycle.

Development

Market value and technical feasibility of features are analysed, followed by UI design, architecture planning, feature implementation, security review, and privacy impact analysis.

Customer Support

Technical Support troubleshoots issues, provides demos, and gathers customer feedback, which is used for product enhancement.

Sales

Marketing team generates leads through various channels, and Sales teams convert leads into customers through personalized demos and free trials.

After-sales Account Management

Our dedicated Zoho One relationship management and support team ensures a strong customer relationship is maintained throughout the service period. We achieve this through various measures

Relationship Management

We actively manage the relationship and communications between our customers and our team. We ensure that there is a proactive open and transparent communication, addressing any concerns or queries promptly.

Customer Satisfaction

We strive to ensure customer satisfaction by delivering reliable and high-quality service. We actively seek feedback from our customers and take necessary actions to address any issues or improve our service based on their input.

Health Check

Periodic health checks are conducted to ensure solution performance, availability, and feature utilization.

Product Updates

Users are notified via email regarding any feature releases, enhancements, vulnerability fixes, etc.

Subscription Renewal

An automated email is sent to users when the subscription is due for renewal. The respective sales team will reach out to the user to complete the renewal process.

Terminal Process

Customers may terminate their Agreement for cause

(i) upon 30 days written notice to the other party of a material breach if such breach remains uncured at the expiration of such period, or (ii) if the other party becomes the subject of a petition in bankruptcy or any other proceeding relating to insolvency, receivership, liquidation or assignment for the benefit of the creditors. Upon termination for cause by customer, Zoho shall refund Subscriber any prepaid fees covering the unused portion of the Subscription Period. Upon any termination for cause by Zoho, Subscriber shall expedite all payments due to Zoho and in no event will termination of this Agreement relieve Subscriber of its obligation to pay any fees due to Zoho. Upon termination of the Agreement, Zoho will make all Subscriber Zoho Confidential MSA Data available to Subscriber for electronic retrieval for a period of thirty (30) days in a suitable format supported by On-Demand Services, after which Zoho may permanently and irrevocably destroy all Subscriber Data in its possession or control.

OUR EXPERIENCES

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Case Studies



<https://www.zoho.com/one/barings-law.html>

Barings Law is a leading law firm based in the North West of England with a largely litigious focus. Representing around half a million clients across thousands of claims, Barings Law holds data-breaching corporates to account and champions the rights of consumers who have been mis-sold financial products or subjected to undisclosed commissions and hidden fees. Believing everyone deserves access to professional legal representation regardless of their financial position, background or location, the team also helps immigrants fleeing war-torn countries with pro-bono asylum applications. Barings Law's mission statement is "we make justice accessible to all".

The move to Zoho One was driven by an initial need to update the firm's CRM software. Barings Law used both Proclaim and Pipedrive CRM to manage its portfolio of legal cases but had become frustrated with the limited customisation potential, clunky user experience and reliance on developers that both platforms presented. After seeing an implementation of Zoho CRM at a partner firm, Melanie Cope Machial, Head of Marketing and Technology, booked a CRM demonstration directly with Zoho. It was this discovery call that was to introduce Barings Law to the Zoho One ecosystem and its possibilities, from which the business has never looked back.

Starting with CRM, Barings Law built a customised platform to handle the bulk-processing of thousands of claims, reflect legal pipelines and capture client feedback in a custom module. Integrating Zoho Sign, Barings Law were able to push pre-populated legal documents en-masse for signing by claimants, lenders and defendants and track the status of each document from inside the CRM. Embedding Zoho Workdrive into CRM allowed the company to securely store and share legal documents in a structured way that mirrored the case files inside CRM. Meanwhile, Zoho Flow effortlessly connected the CRM with Barings Law's third-party apps, triggering the bulk generation of letters of claims using Formstack for instance. Finally, Barings Law leveraged the marketing tools inside Zoho One to improve communication across social and email channels. Half a million Barings subscribers now seamlessly receive data-gathering and promotional emails via Zoho Campaigns and topical updates are shared with the company's followers via Zoho Social. By implementing the Zoho One package, Barings Law has ushered in innumerable advantages across the business. By consolidating its tech stack the firm has saved thousands of pounds per year in subscription costs, streamlined a multitude of processes and increased efficiency, has double its caseload capacity on a monthly basis, drastically cut down customer complaint resolution times and has been able to allow agents and paralegals to work securely from home.

Key Highlights

- Zoho CRM's powerful automations and custom modules create a comprehensive case management system from onboarding, through litigation and settlement.
- Native integrations with Zoho Sign and Zoho Workdrive have driven further operational efficiencies.
- Zoho Campaigns syncs with CRM to pre-populate information-gathering emails.
- Zoho Social manages multiple Barings Law profiles from one easy dashboard.
- Since moving to Zoho, Barings Law has doubled its monthly caseload.
- Customer complaint resolution time has reduced from 2-3 weeks to 3 days.
- Zoho One saves subscription costs, developer fees, time and resources.

Clients



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