



Premium Support



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Premium Support

At Zoho, we don't just craft software to solve your business problems. With our dedicated support team, we put the same effort into helping our users adopt Zoho to reach their business goals. Our support staff are skilled at recognizing your product issues, resolving them swiftly, and assisting you whenever you need them. However, our service does not end here.

We recognize that every business is different, with unique objectives, use cases, priorities, and overall requirements. **That's why we offer Premium Support as a paid add-on with your Zoho product subscription.**

What it Offers





- Guided onboarding sessions for the first two months of your subscription to help you get started the right way. During these sessions, your onboarding specialist will walk you through product features and offer personalized guidance on implementing Zoho for your business.
- 24-hour support availability and prioritized product assistance (Monday – Friday) with a maximum acknowledgement time of 3 hours.
- Multi-channel support availability: email, toll-free calls, chat.
- Remote assistance through screen-sharing for effortless troubleshooting.
- Access to developer guides, articles, ebooks, videos, webinars, and other on-demand resources on setup, customization, and best practices for using Zoho products.

Exclusions

Premium support does not cover the following:

- Workshops and on-site training programmes
- Enhancements and customizations
- End-to-end implementation
- Support for external connected applications and integrations that are beyond Zoho's scope

Eligibility

If you are subscribing to (or have subscribed to) a paid edition of  CRM,  CRM Plus,  One, or  Desk, you can purchase the Premium Support add-on.

Cost

Premium Support is priced at
20% of your Zoho subscription fee.

Onboarding

For all businesses, the months that follow a new software purchase play a critical role in its adoption. They need to make effective use of this time to set up their new service and align it with their business processes in the best way they can. That is why, along with around-the-clock contextual technical support, we also offer onboarding as part of our premium support plan.

Onboarding includes personalized guidance to help you set up your Zoho product so that your business can get the most out of it.

When you subscribe to premium support, your onboarding specialist will review your requirements, existing business processes, and pain points. With a better understanding of how you work, they will help you frame goals for your onboarding period by compiling a list of everything you want to achieve with Zoho. They will then guide you through a series of one-on-one sessions until your product is configured for your business and your onboarding goals are met.

Onboarding Specialist

A dedicated onboarding specialist will be assigned to your account within 24 hours of subscribing to Premium Support.

Onboarding specialists are expert advisors from Zoho with several years of experience drilling down into business use cases to help stakeholders align our products with their processes.

Your onboarding specialist will:

- Walk you through your Zoho product(s) so that you can swiftly familiarize yourself with the interface and begin using it
- Speak with you to learn about your company's existing processes and pain points
- Analyze your processes and pain points to determine how you can use your product's capabilities to optimize your business
- Condense all the ways you can use Zoho into a list of individual, actionable product configuration goals
- Create a personalized project timeline and schedule remote sessions to guide you through these goals

- Procure and share on-demand resources such as developer guides that cater specifically to your use case
- Teach best practices to help you use features effectively and move you towards successful product adoption

Onboarding Sessions

The number of remote onboarding sessions you need to learn, set up, and implement Zoho for your business may vary depending on factors like:

- The size of your business
- The complexity of your use case
- The number of stakeholders involved in your implementation who need guidance from the onboarding specialist

With Premium Support, you can schedule **a maximum of five 60-minute sessions per week** (Monday – Friday). The duration of your onboarding period is fixed based on the number of user licenses you have purchased.

Note: Please keep in mind that the onboarding team is not authorized to get your login credentials. During the onboarding sessions, you may want the support team to execute certain actions or functions by sharing your login details. Kindly refrain from doing so. This process is in place to limit the access to your confidential information.

Use Cases:

Here are some requirements we have helped businesses successfully set up Zoho for:

Lawley Pharmaceuticals manufactures hormone replacement therapies for treating endocrine deficiencies and medical conditions. Their onboarding specialist gave them an overview of **Zoho One** and guided them through their implementation.

Their requirements were:

- Capturing leads from their website in **Zoho CRM** using forms
- Automating lead assignment based on geographic region
- Setting up access permissions for records for sales reps belonging to different regions
- Pushing the website feedback to **Zoho Desk** as tickets
- Digitizing their expense management process using **Zoho Expense**
- Creating and sending customer feedback surveys and automatically adding survey responses to customer records
- Streamlining and automating targetted emails and newsletters using **Zoho Campaigns**

Number of onboarding sessions: 25

RV Armor, Inc. provides seamless, custom-fit recreational vehicle roofing systems to customers through a nationwide network of specialized technicians. Their onboarding specialist guided them to set up these processes in **Zoho One**:

- Capturing leads from their website in **Zoho CRM** using forms
- Syncing CRM with **Zoho Sales IQ** to integrate it with their website and assist marketing efforts
- Linking and transferring Leads from their primary CRM to their secondary CRM
- Syncing CRM with **Zoho Campaigns** to send mass emails to leads and clients
- Setting up a single-click estimate creation process in **Zoho Books**
- Automating folder creation and file storage in **Zoho WorkDrive** for saving documents like estimates, invoices, and payments
- Using workflows and mail merge to automate sending files stored in these folders to vendors, customers and users.
- Setting up deal pipelines and workflows to assist team collaboration when completing jobs for customers

Number of onboarding sessions: 15

Jcyared supplies building materials, oil, and gas equipment and manages projects for clients. They set up their **Zoho CRM** with assistance from their onboarding specialist to meet the following requirements:

- Creating a custom module to track their projects in stages until completion
- Associating multiple projects with the same deal
- Writing custom functions to:
 - Auto-update fields in associated records between modules
 - Fetch and transfer subform data across modules
 - Automate email notifications to sales reps when a record lacks subform data
 - Automate daily field updates
 - Validate phone numbers

Number of onboarding sessions: 10

Our Track Record




Testimonials

As a fintech company, we had a lot of processes that we needed to implement and workflows that needed to be set up within Zoho One. A lot of our internal processes are very complicated. However, I've been able to discuss them with our onboarding specialist, and he has always found a solution to make our processes better and more efficient with Zoho. His knowledge of the products and how to best suit them to the customer's needs is outstanding. Over the course of our onboarding period, he has been amazing in helping me with the mammoth task of getting set up and has also helped us out of technical issues. My thought on Zoho is that your USP is people like your onboarding specialists who help companies like mine establish systems that are an integral part of our core structure, with such an amazing attitude and desire to help.

Khalida Akhtar

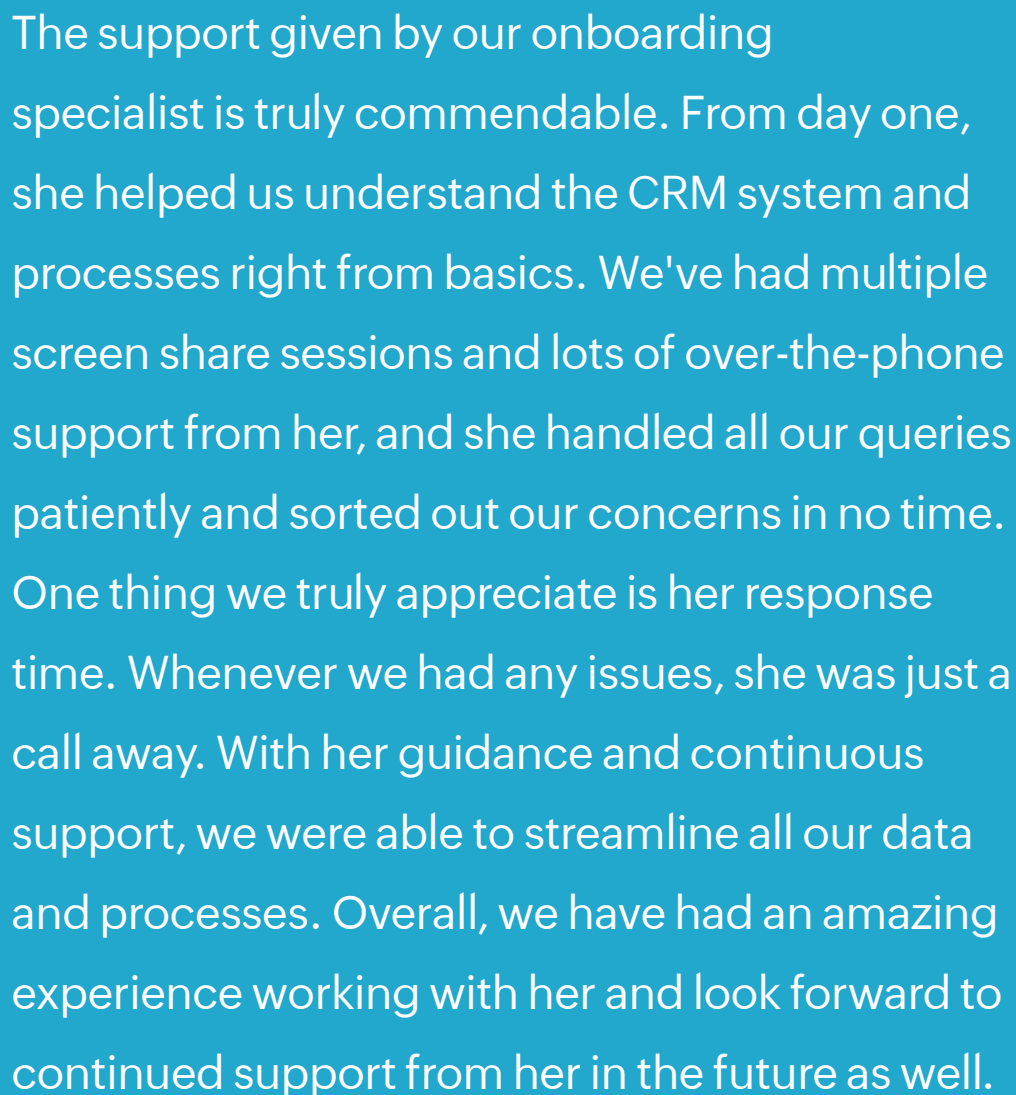
Head of Client Communications, Paydek



Our onboarding specialist made our process for establishing a CRM within our company a complete breath of fresh air. He took this time to delve deeply into the needs of our organization, and was very knowledgeable and helpful. Each session, he would utilize remote assistance to take control of my screen, and give me a great sense that everything is being put together piece by piece right before my eyes, with my direction and requirements. This level of support is unrivalled. It is much more effective than having people direct me to articles and telling me to do it myself. It was a great experience from start to finish.


Brian B

National Insurance Direct



The support given by our onboarding specialist is truly commendable. From day one, she helped us understand the CRM system and processes right from basics. We've had multiple screen share sessions and lots of over-the-phone support from her, and she handled all our queries patiently and sorted out our concerns in no time. One thing we truly appreciate is her response time. Whenever we had any issues, she was just a call away. With her guidance and continuous support, we were able to streamline all our data and processes. Overall, we have had an amazing experience working with her and look forward to continued support from her in the future as well.

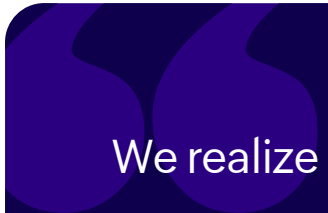
Mohammad Eranpurwala
Sales Manager, TSG Resorts



Our assigned specialist has been wonderful with our onboarding training. She has been so very knowledgeable and professional and was able to answer all our questions and provide easy instructions. She has been able to provide solutions we didn't know we needed and recommendations that suit our business needs. On top of her tech and business knowledge, she has been patient and friendly.

Mel Venter

Business Development Manager, Lawley Pharmaceuticals



We realize that by selecting Zoho, we have chosen an excellent software company with great people that provide superb service and support. Our interactions with all of Zoho's teams and people have been positive and, quite frankly, so far have exceeded our expectations.

We cannot thank Zoho enough for our assigned onboarding executive's support, direction, and guidance. He has been key to our CRM implementation efforts, and his kind personality, professionalism, knowledge, and complete dedication are extraordinary.

Our CRM implementation now has a strong background, thanks to Zoho's Onboarding services! We feel confident knowing that we are walking the CRM path with your technology and your people, with their unique spirit to help us achieve our and our client's objectives and needs.

Harmodio Deycaza

International Sales Director, Edusoft

FAQs

1. What is your support policy?

The following table outlines Zoho's customer support tiers and the services included in them:

| | Basic Support | Classic Support | Premium Support |
|---------------------------|---|---|---|
| Availability | Available by default for all Free Editions of Zoho products | Available by default for all Paid Editions of Zoho products | Costs 20% of your Zoho subscription fee and can be purchased as an add-on |
| Max. response time | 24 hours | 8 hours | 3 hours |
| Knowledge base | ✓ | ✓ | ✓ |
| Community forums | ✓ | ✓ | ✓ |
| Email support | ✓ | ✓ | ✓ |
| Self-service portal | ✓ | ✓ | ✓ |
| Live chat support | | 8 hours x 5 days | 24 hours x 5 days |
| Phone support (toll-free) | | 8 hours x 5 days | 24 hours x 5 days |
| Remote assistance | | ✓ | ✓ |
| Onboarding | | ✓ | ✓ |

2. My company has not purchased Premium Support. Can we still receive onboarding help for our Zoho product?

If you have a paid subscription with 4 or more user licenses of Zoho CRM, Zoho CRM Plus, Zoho One, or Zoho Desk, you will get remote one-on-one sessions by default. The following table shows the differences between our classic and premium onboarding services:

| | Classic Onboarding | Premium onboarding |
|--|--------------------|--------------------|
| Remote session and walkthrough of the product UI and features | ✓ | ✓ |
| Discussion of requirements, processes, and pain points to identify your goals with the product | ✓ | ✓ |
| Dedicated onboarding specialist | | ✓ |
| Step-by-step personalized guidance for setup and configuration | | ✓ |
| Max. number of sessions | 3 per week | 5 per week |
| Session length | 30 minutes | 60 minutes |

| | Classic Onboarding | Premium onboarding |
|---|---|--|
| Support availability | 8 hours x 5 days | 24 hours x 5 days |
| Acknowledgement and initial response time | 8 hours | 3 hours |
| Eligibility criteria and cost | Available by default with the purchase of at least 4 user licenses of Zoho CRM, Zoho CRM Plus, Zoho One, or Zoho Desk | Available for all customers on purchase of the Premium Support add-on (20% of your subscription fee) |

3. Will our onboarding specialist implement Zoho for our company?

Your onboarding specialist will guide you through the setup process and configuration, will offer you suggestions, and will teach you best practices to align your Zoho product with your business processes. However, they will not set up or implement it for your company.

For quick setup and configuration of Zoho CRM, you can check out [Jumpstart](#). For business solutions and end-to-end implementation of Zoho for your business, check out our [Enterprise Business Solutions \(EBS\)](#).

4. What can I expect by the end of the onboarding period?

By the end of your onboarding period, with regular scheduled sessions with your onboarding specialist, you can expect to:

- Have your team be fully familiar with your Zoho product and be able to navigate the user interface easily
- Be able to perform all essential administrator tasks, so that you can set up your Zoho product the way you need it to function for your business
- Have your product configured to meet all your primary requirements

5. Once my onboarding period ends, will I stop receiving support from Zoho?

Once your onboarding period ends, although you may no longer be able to schedule onboarding sessions with our experts, you will continue to receive all the other services from our support team.

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