



 Subscriptions

Training: Complete Course Plan

About

The Zoho Subscriptions training course is a two-day online training program that is aimed at enabling subscription businesses to set up their organization in Zoho Subscriptions and learn best practices for using the software. Each module includes a concept explanation, demonstration, hands-on exercises, and a Q&A session.

Who it is for:

Subscription business owners from different domains like SaaS, membership clubs, marketing or consulting services, web design and development services, telecommunication/ISP/IoT services, subscription boxes, publishing, and digital media subscriptions.



Day One - 3 Hours

Module 1: Introduction

- Introduction to subscription billing
- Setting up your organization
- Configuring a billing model
- Setting up plans and add-ons
- Customizing invoice, email, and hosted page templates
- Connecting with a payment gateway (for online payments)
- Embedding plans on your website: Widgets and hosted pages

Module 2: Subscription workflow

- Automating creating subscriptions from your website
- Creating subscriptions manually
- Subscription lifecycle
- Accepting payments
- Self-service portal
- Reports



Day Two - 2 Hours

Module: 3: Advanced options

- Integration: Zoho apps and third-party apps
- APIs
- Webhooks
- Custom functions
- Custom domains and SSO for portal

Module: 4: Best practices

- Security (PCI and TFA)
- User role restrictions
- Mobile applications (Passcode, Touch ID, and Face ID)

