

Zoho Projects for Tier Evaluation for Partners



Document Objective

The objective is to help partners use and navigate the projects view section effectively in the partner store, which is considered a crucial factor in the Tier evaluation process.

Note:

Every new project and successful marketplace integration updated on the Partner profile section in-store adds to 10 points. Within this parameter, a Partner can earn a maximum of 50 points.

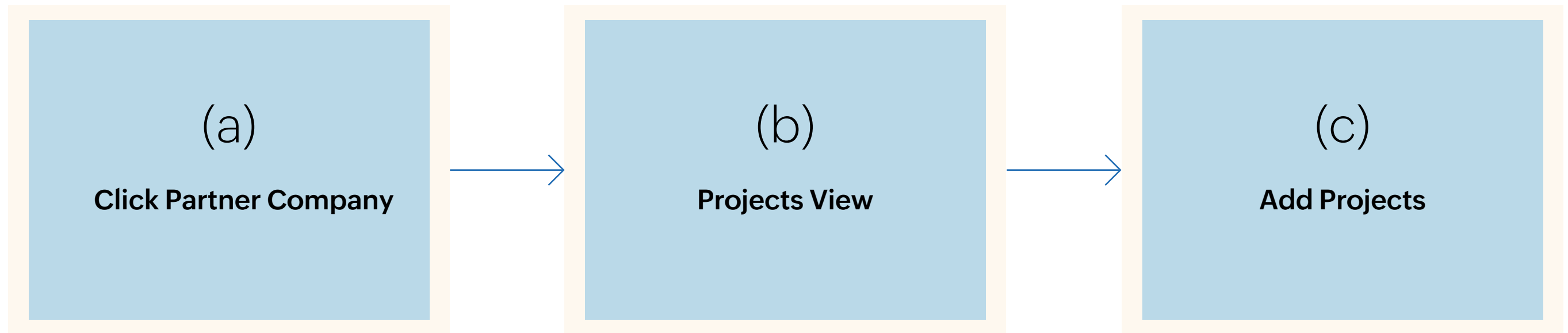
Step 1

Login to <https://store.zoho.com>

The screenshot displays the Zoho Store interface for a partner. The top navigation bar includes the Zoho logo, a search bar for customers, and the partner ID: PU2372993. The left sidebar contains various navigation options, with 'Partner Company' (a) and 'Projects View' (b) highlighted. The main content area shows a table titled 'Projects View' with an 'Add Projects' button (c) at the top left. The table lists six projects with their respective details and actions.

S.No	Submission Type	Customer Country	Customer State	Region	Customer Industry	Zoho Service	Non Zoho Products	Project Status	Actions
1	Implementation Project	United States	Alaska	Us West	Accounting	CRM,Projects,Invoice	3, .Net	Waiting For Approval	View Edit
2	Connector/marketplace Application			Others	Apparel & Fashion	Projects		Approved	View
3	Connector/marketplace Application			Others	Distribution	CRM,Wiki		Rejected	View Edit
4	Connector/marketplace Application			Others	Travel & Tourism	CRM,Wiki		Waiting For Approval	View Edit
5	Connector/marketplace Application			Others	Real Estate	LandingPage,EInvoice		Waiting For Approval	View Edit
6	Connector/marketplace Application			Others	Human Resources	CRM,Invoice	.Net, Java, Struts	Waiting For Approval	View Edit

Step 2



A new window named "Project details" opens, which contains the field mentioned in the below screenshot for three different submission types.

The "Types of Submission" contains 3 Values

1. Implementation Project
2. Solution
3. Connector/Marketplace Application

1. Implementation Project

As partners when you have successfully completed implementation projects for (SMB/MM/ENT) customers, you can submit the requisites along with the scope document in the form mentioned in the [projects view](#) section. These implementation projects are alternatively referred to as enterprise deals or large deals.

Key factors to note:

Projects handled	Deal Value (license deal)	Users	Duration	Integrations
CRM / Zoho One / Creator	Greater or equal to \$5000	NA	More than 2 months	Third party integrations more than or equal to two. (>=2integrations)
Finance suite	Greater or equal to \$1000	NA	NA	NA
Workplace	NA	Minimum 100	NA	NA

Customer segment - (SMB/MM/ENT)

Once you choose the type of submission (Implementation/Solution/Connector/Marketplace Application) please ensure you fill the rest of the fields without fail and submit.

The partner operations team will evaluate the submission and will action on them. You can find the project submission status as Waiting for approval | Approved | Rejected.

The below table provides you the fields specific to an Implementation project.

Project Details	
Type of Submission	Implementation Project
Industry	Accounting
Customer Org Name	CYZ
Customer Country	United States
Customer State	Alabama
Zoho Product Implemented	Projects, CRM
Non Zoho Tech Skills Used	SAP, .Net
Total users using the application	30
Duration of Implementation (in months)	8
Start Date	2023-01-02
End Date	2023-08-08
Upload Scope Document (Supported file: pdf)	Upload
Total Effort (in months)	8
Description	Client's initial situation, Challenges faced, Issues Addressed, Action items, solution architecture, the scope of services, results, and any other relevant details.
Can this be showcased on your profile?	<input checked="" type="checkbox"/>
Can this be converted into a case study?	Yes, I have permission from the customer
Upload Case Study (Supported file: pdf)	Upload
Integrations	External
Can it be Published/quoted by Zoho?	Yes
Details on Case Study	A link to case study template is provided.
Customer speak/Testimonial/Video link	Link to testimonials
Type of account	Shared by Zoho
Status of the project	Implementation completed - UAT
	Submit

Type of Submission	Implementation Project	1 / 3
Industry	Industry type which the customer belongs	
Customer Org Name	Customer's name for whom the implementation has been completed	
Customer Country	Country to which customer belongs	
Customer State	State to which customer belongs	
Zoho Product Implemented	Use the tick box to choose the product implemented for the customer. (Note: You can choose more than one option)	
Non Zoho Tech Skills Used	Use the tick box to choose non zoho tech skills used to do the implementation. (Note: You can choose more than one option)	
Total users using the application	Mention the number of users registered by the customer. (Note: For Workplace the minimum number of users must be 100)	
Duration of Implementation (in months)	Time taken to complete the implementation. (Note:For CRM / Zoho One / Creator its more than two months)	
Start Date	Date on which the project implementation started	

Type of Submission	Implementation Project	2 / 3
End Date	Date on which the project implementation was completed	
Upload Scope Document (Supported file: pdf)	Upload the scope document for the implementation project (Link to the sample scope document)	
Total Effort (in months)	Total efforts in months from Initiation to Planning to Execution	
Description	Add all the relevant details required about the project implementation	
Can this be showcased on your profile?	By choosing this option, the project implementation process including the scope document will be available to prospects who are looking to implement similar projects.	
Can this be converted into a case study?	By choosing this option, you let the partner team know about the feasibility of creating a case study which again can be showcased to other prospects looking for a similar implementation.	
Upload Case Study	Find the link to the case study template	
Integrations	External or Internal?	

Type of Submission	Implementation Project	3 / 3
Can it be Published/quoted by Zoho?	Permission to publish and quote the case study	
Details on case study	Date on which the project implementation was completed	
Customer speak/Testimonial/Video link	Link to Testimonials if any	
Type of Account	Mention whether the customer was referred by Zoho or acquired by you	
Status of the project	Mention the status of the project from the options provided	

2. Solution Project

This is about creating a solution tailored to a particular need related to a feature within the Zoho Service. For instance, this could involve crafting a solution exclusively using the workflow and custom function features of Zoho CRM, without incorporating any other implementations.

Project Details

Type of Submission	<input type="text" value="Solution"/>
Zoho Product/Platform on which the solution is built	<input type="text" value="1 / 10 option selected"/>
Industry	<input type="text" value="Food & Beverages"/>
Is this live?	<input type="text" value="Yes"/>
Link	<input type="text" value="Link to the solution"/>
Customer Country	<input type="text" value="United States"/>
Customer State	<input type="text" value="Alabama"/>
Zoho Product Implemented	<input type="text" value="Projects, CRM"/>
Non Zoho Tech Skills Used	<input type="text" value="SAP, .Net"/>
IP Ownership	<input type="text" value="My Org"/>
If customer owns the IP, please name the customer	<input type="text"/>
How many customers are using the solution	<input type="text" value="30"/>
Total Effort (in months)	<input type="text" value="8"/>
Description	<input type="text" value="Client's initial situation, Challenges faced, Issues Addressed, Action items, solution architecture, the scope of services, results, and any other relevant details."/>
Can this be showcased on your profile?	<input checked="" type="checkbox"/>
Can this be converted into a case study?	<input type="text" value="Yes, I have permission from the customer"/>
Upload Case Study (Supported file: pdf)	<input type="button" value="Upload"/>
Integrations	<input type="text" value="External"/>
Can it be Published/quoted by Zoho?	<input type="text" value="Yes"/>
Details on Case Study	<input type="text" value="A link to case study template is provided."/>
Customer speak/Testimonial/Video link	<input type="text" value="Link to testimonials"/>
Type of account	<input type="text" value="Shared by Zoho"/>
Status of the project	<input type="text" value="Implementation completed - UAT"/>

Type of Submission	Solution Project	1 / 3
Zoho Product/Platform on which the solution is built	Use the tick box to choose the product on which the solution is built. (Note: You can choose more than one option)	
Industry	Industry type which the customer belongs	
Is this live?	Yes	
Link	If the solution is live, then provide the link to it.	
Customer Country	Country to which customer belongs	
Customer State	State to which customer belongs	
Zoho Product Implemented	Use the tick box to choose the product implemented for the customer. (Note: You can choose more than one option)	
Non Zoho Tech Skills Used	Use the tick box to choose non zoho tech skills used to do the implementation. (Note: You can choose more than one option)	
IP Ownership	My Org	

Type of Submission	Solution Project 2 / 3
If customer owns the IP, please name the customer.	Self Explanatory
How many customers are using the solution?	Mention the number of customers for which the solution was provided
Total Effort (in months)	Total efforts in months from Initiation to Planning to Execution
Description	Add all the relevant details required about the project implementation
Duration of Implementation (in months)	Time taken to complete the implementation
Description	Add all the relevant details required about the project implementation
Can this be showcased on your profile?	By choosing this option, the project implementation process including the scope document will be available to prospects who are looking to implement similar projects.
Can this be converted into a case study?	By choosing this option, you let the partner team know about the feasibility of creating a case study which again can be showcased to other prospects looking for a similar implementation.
Upload case study	Upload the case study - Link to the case study format

Type of Submission	Solution Project	3 / 3
Integrations	External or Internal?	
Can it be Published/quoted by Zoho?	Permission to publish and quote the case study	
Details on case study	Find the link to the case study template	
Customer speak/Testimonial/Video link	Link to Testimonials if any	
Type of Account	Mention whether the customer was referred by Zoho or acquired by you	
Status of the project	Mention the status of the project from the options provided	

3. Connector/Marketplace Application

3. A. Connector

Select this option when you have developed a solution that bridges a 3rd Party Application with a Zoho Service. This could involve things like Plugins or Connections utilizing the API, or other 3rd Party Connectors such as Zapier or Zoho Flow.

3. B. Marketplace Application

If you're a Developer or a Platform Partner looking to craft extensions and sell them through our Zoho Marketplace, you can opt for the Marketplace Application. Within the Marketplace, you have the ability to release extensions for Zoho products, personalized Creator applications, and specialized CRMs.

Note:

The marketplace or connector application developed must be used at least by three customers.

Project Details

Type of Submission	Connector/Marketplace Application
Short Description Less than 50 words	A short summary of the project
Industry	Computer & Network Security
Is this live?	Yes
Link	
Customer Country	Canada
Customer State	Alberta
Zoho Product Implemented	Books
Non Zoho Tech Skills Used	SAP, Java
IP Ownership	My Org
If customer owns the IP, please name the customer	
How many customers are using the solution	5
Total Effort (in months)	9
Description	Client's initial situation, challenges faced, issues addressed, action items, solution architecture, scope of services, results and any other relevant details.
Can this be showcased on your profile?	<input checked="" type="checkbox"/>
Can this be converted into a case study?	Yes, I have permission from the customer
Upload Case Study (Supported file: pdf)	<input type="button" value="Upload"/>
Integrations	External
Can it be Published/quoted by Zoho?	Yes
Details on Case Study	A link to case study template is provided.
Customer speak/Testimonial/Video link	Link to testimonials
Type of account	Shared by Zoho
Status of the project	Implementation completed - UAT
<input type="button" value="Submit"/>	

Type of Submission	Connector/ Marketplace application	1 / 3
Short Description less than 50 words	A short summary about the project	
Industry	Industry type which the customer belongs	
Is this live?	Yes	
Link	If the solution is live, then provide the link to it.	
Customer Country	Country to which customer belongs	
Customer State	State to which customer belongs	
Zoho Product Implemented	Use the tick box to choose the product implemented for the customer. (Note: You can choose more than one option)	
Non Zoho Tech Skills Used	Use the tick box to choose non zoho tech skills used to do the implementation. (Note: You can choose more than one option)	
IP Ownership	My Org	

Type of Submission	Connector/ Marketplace application	2 / 3
If customer owns the IP, please name the customer.	Self Explanatory	
How many customers are using the solution?	Mention the number of customers for which the solution was provided. (Note: The marketplace or connector application developed must be used at least by three customers.)	
Total Effort (in months)	Total efforts in months from Initiation to Planning to Execution	
Description	Add all the relevant details required about the project implementation	
Duration of Implementation (in months)	Time taken to complete the implementation	
Description	Add all the relevant details required about the project implementation	
Can this be showcased on your profile?	By choosing this option, the project implementation process including the scope document will be available to prospects who are looking to implement similar projects.	
Can this be converted into a case study?	By choosing this option, you let the partner team know about the feasibility of creating a case study which again can be showcased to other prospects looking for a similar implementation.	
Upload case study	Upload the case study - Link to the case study format	

Type of Submission	Connector/ Marketplace application	3 / 3
Integrations	External or Internal?	
Can it be Published/quoted by Zoho?	Permission to publish and quote the case study	
Details on case study	Find the link to the case study template	
Customer speak/Testimonial/Video link	Link to Testimonials if any	
Type of Account	Mention whether the customer was referred by Zoho or acquired by you	
Status of the project	Mention the status of the project from the options provided	



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