

PROGRAM AGREEMENT

THIS AGREEMENT is between **CANOE PROCUREMENT GROUP OF CANADA**, a tradename of the Rural Municipalities of Alberta, a corporation incorporated pursuant to the laws of Alberta ("**CANOE**") and:

Supplier Legal Name: Zoho Canada Corporation

Supplier Corporate Jurisdiction: 705 Cotton Mill St Unit 116, Cornwall, ON K6H 7K7
(the "**Supplier**"), as of

Date of Agreement: May 1, 2026 regarding

RFP No. CAN-2026-001

RFP Title Public Sector Enterprise Resource Planning (ERP) Software
(the "**RFP**").

BACKGROUND

- A. Canoe is a public agency serving as a national municipal contracting agency for its Members, and in that capacity issued the RFP for the purchase of goods and/or services.
- B. The Supplier is engaged in the business of selling some or all of those goods and/or services, and responded to the RFP.
- C. Canoe wishes to enter into an agreement with the Supplier for the purchase of goods and/or services by Members, pursuant to a purchase program administered by Canoe.
- D. The Parties wish to set out the terms and conditions upon which those purchases will occur, and under which the purchase program will be administered.

NOW THEREFORE, in consideration of the premises and the mutual covenants herein contained and of other good and valuable consideration (the receipt and sufficiency of which are hereby acknowledged by each Party), the Parties hereby agree as follows:

ARTICLE 1 INTERPRETATION

1.1 Definitions

In this Agreement the following terms have the corresponding meanings.

"Administrative Fee" means the fee paid by the Supplier to Canoe as described in this agreement (Administrative Fee) and protected under FOIPPA.

11.11 Further Assurances

Each Party will take all necessary actions, obtain all necessary consents, file all necessary registrations and execute and deliver all necessary documents reasonably required to give effect to this Agreement.

11.12 Counterparts

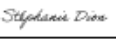
This Agreement may be executed in any number of counterparts. Either Party may send a copy of its executed counterpart to the other Party by Electronic Transmission instead of delivering a signed original of that counterpart. Each executed counterpart (including each copy sent by Electronic Transmission) will be deemed to be an original; all executed counterparts taken together will constitute one agreement.

IN WITNESS WHEREOF the Parties have executed this Agreement as of the date first written above.

CANOE PROCUREMENT GROUP OF CANADA

By:  _____
Tyler Hannemann (Jul 9, 2026 11:00:49 MDT)

Name: Tyler Hannemann
 Title: General Manager

By:  _____

Name: Stéphanie Dion
 Title: Manager of Procurement

Supplier Legal Name: Zoho Canada Corporation

By:  _____
L.S.P. Chandrashekar (Jul 8, 2026 15:51:11 EDT)

Name: Chandrashekar Lalapet Srinivas Prasanna
 Title: Managing Director of Zoho Canada Corporation

SCHEDULE "A"

RFP PARTICULARS

PART B – RFP PARTICULARS

A. THE “DELIVERABLES”

SOLUTIONS-BASED SOLICITATION

This solicitation process is structured as a solutions-based solicitation, indicating that Canoe is seeking services aligned with the general requirements outlined in the scope of this RFP and consistent with widely accepted industry standards.

The objective of this RFP is to identify and engage qualified suppliers capable of delivering a comprehensive portfolio of Public Sector Enterprise Resource Planning (ERP) Software to support the operational needs of municipalities, cities, federal provincial governments, academic institutions and healthcare organizations. Proponents may include related services provided these are complementary to the proposed commodities.

B. REQUESTED SERVICES

Canoe is seeking proposals from qualified suppliers for Enterprise Resource Planning (ERP) Software for both Integrated ERP Suite and best of breed models.

The Proponent must primarily provide an ERP solution. Proponents whose main products are unrelated systems, such as emergency management, land-use planning, permitting, or inspections software, will not meet this requirement unless they also supply a full ERP solution as their primary offering.

The proposed solution must be an ERP solution that natively supports, at minimum, the following core administrative capabilities for public entities without relying on multiple standalone software products:

- integrated financial management
- general ledger, payables, receivables
- procurement and contract lifecycle management
- HR, payroll, and timekeeping
- budget development, forecasting, and reporting
- asset management and work management
- workflow automation, audit trail, and role-based access
- analytics and reporting within the SaaS environment
- vendor-hosted, vendor-maintained, continuously updated

The following three types of solutions are acceptable:

Model 1. Integrated ERP Suite solution

A single, unified Enterprise Resource Planning system that delivers the core administrative functions—finance, HR/payroll, procurement, budgeting, taxation, utilities, reporting—within one integrated platform and one data model. These systems are designed to operate as a cohesive whole rather than as combined standalone applications.

Model 2. Best-of-Breed solutions

An ERP solution delivery approach where the ERP platform provides core administrative functions and specialized third-party applications are used for specific business needs. The ERP must expose open, well-documented APIs to support secure, reliable integration, and must remain the primary system of record for administrative data provided that:

- the ERP platform includes open, well-documented APIs or connectors.
- integration with third-party systems can be accomplished in a straightforward manner; and
- the ERP platform remains the system of record for core administrative functions.

Model 3. Specialty Municipal Systems solutions

Smaller-scope municipal systems that provide important but limited administrative functionality (such as AP automation, taxation, utility billing, or legacy finance functions) but do not constitute a full ERP solution as described above. Software for emergency management, land-use planning, permitting, GIS or inspections are not included in this RFP.

Solutions assembled from separate products, or solutions primarily designed for unrelated domains (such as emergency management, permitting, land planning, or inspections systems), will be considered non-compliant unless they form part of a unified ERP solution.

Proponents are expected to provide a broad selection of services at reduced prices, offering better value than they typically would to federal and provincial governments, municipalities, cities, academic institutions and school boards. They must address a wide variety of applications and equipment needs. These products, services and/or goods are designed to support or complement the proposed equipment, products, or services, helping maintain smooth operations, greater efficiency, and long-term effectiveness in these sectors.

Canoe prefers suppliers that provide a sole source of responsibility for the services provided under a resulting master agreement. If a proponent is including products, and services of its subsidiary entities, the proponent must also identify all included subsidiaries in its proposal. If proponent requires the use of distributors, dealers, resellers, or subcontractors to provide the equipment, products, or services, the proposal must address how the products or services will be provided to Members, and describe the network of distributors, dealers, resellers, and/or subcontractors that will be available to serve Members under a resulting Program Agreement.

It is expected that proponent's have knowledge of all applicable industry standards, laws, and regulations and possess an ability to market and distribute the equipment, products, or services to Members.

1. Utilisation of the contract – Canoe members

Canoe Members may choose but are not obligated to utilise the services during the term of the agreement. There is no minimum guarantee of usage.

2. Requirements

Proponents are expected to submit a comprehensive proposal that clearly demonstrates the overall best value in alignment with the scope outlined in this Solicitation. The evaluation of best value will encompass, but is not limited to, consideration of the following components within your RFP submission:

- Competitive pricing across the span of services offered beyond a defined service offering.

- Proponents must specify any costs that are excluded from the pricing of their proposed product or service. These might include expenses such as installation, setup, required training, or initial inspections. In addition, proponents should explain any distinctive distribution or delivery options that are part of the proposal.
- Our Members frequently inquire about several aspects, including: the speed and cost of accessing services, procedures for service access, establishing their own review processes, potential location constraints, user-friendliness of service access, support for the local economy, compliance with trade agreements, advantages for their entities when utilizing this contract, availability of knowledgeable contacts for inquiries, commitment to customer care, expected service quality, and potential impacts on their operations and financial outcomes.

To support an industry leading value-based solution, Canoe is requesting that all interested proponents provide a thorough and comprehensive description of their ability to provide the Deliverables when answering the specification questionnaires in the Procurement Portal.

D. MANDATORY SUBMISSION REQUIREMENTS

1. Submission and Specification Questionnaires

Proponents must answer specification questionnaires directly into Canoe's Procurement Portal. Proposal materials should be prepared and submitted in accordance with the instructions in the Procurement Portal, including any maximum upload file size.

Proponents should refer to the instructions in the Procurement Portal and provide all required information in accordance with the instructions provided.

2. Pricing

Each proposal must include pricing information that complies with the instructions set out in the Procurement Portal.

E. MANDATORY TECHNICAL REQUIREMENTS

- The Proponent must primarily provide an integrated Enterprise Resource Planning Software solution. Proponents whose main products are unrelated systems, such as emergency management, land-use planning, permitting, or inspections software, will not meet this requirement unless they also supply a full ERP solution as their primary offering and will be deemed non-compliant.
- Proponents must be the OEM of the proposed ERP software solution. Resellers, distributors, brokers, agents, or any other parties who are not the original software manufacturer are not eligible to submit proposals. Proposals submitted by non-OEM entities will be deemed non-compliant and will not be evaluated.

Proponents should refer to the instructions in the Procurement Portal and provide all required information in accordance with the instructions provided in the Procurement Portal.

F. PRE-CONDITIONS OF AWARD

- Submission of proof of insurance

- Satisfactory reference check if required by Canoe

G. EVALUATION CRITERIA

The following sets out the categories, weightings, and descriptions of the rated criteria of the RFP. Proponents who do not meet a minimum threshold score for a category will not proceed to the next stage of the evaluation process.

Proponents must provide their response in Canoe's procurement portal.

Non-Price Rated Criteria Category	Points
Program offering -Solution offered -Quality standards, certifications -Core ERP capability coverage -Extensibility, integration and interoperability -Technical Support	25
Suitability and Member profile -Functionality and fit -Comparative positioning -Effort requirement -Members' ease of access to program offering	20
Experience -Market share -Public sector experience/clients -Group purchasing experience	15
Engagement, sales, marketing and training plan	10
Subtotal	70
Pricing Classification -Discounts offered	30
Total Points	100

Proponents should refer to the instructions in the Procurement Portal and provide all required information in accordance with the instructions provided in the Procurement Portal.

H. PRICE

Pricing is worth 30 points of the total score.

Instructions on How to Provide Pricing

- Proponents should submit their pricing information electronically within the Procurement Portal.
- Rates must be provided in Canadian funds, exclusive of all applicable duties and taxes.
- Unless otherwise indicated in the requested pricing information, rates quoted by the proponent must be all-inclusive and must include all labour and material costs, all travel

and carriage costs, all insurance costs, all costs of delivery, all costs of installation and set-up, including any pre-delivery inspection charges, and all other overhead, including any fees, duties, tariffs or other charges required by law.

I. AWARD

There are 3 classifications of award:

Group 1. Integrated/full suite ERP solutions: all proponents within 10 points of highest score or top four (4) proponents whichever is greatest are awarded a contract.

Group 2. Best-of-Breed solutions: all proponents within 10 points of highest score or top four (4) proponents whichever is greatest are awarded a contract.

Group 3. Specialty Municipal solutions: all proponents within 10 points of highest score or top three (3) proponents whichever is greatest are awarded a contract.

Competitive Range

Canoe intends to award contracts to all proponents within the Competitive Range. This method ensures Canoe Members have access to high quality vendors and a diverse choice of solutions to meet their needs.

Canoe will rank all proponents by their total score. The Competitive Range includes the highest-ranked proponent and all subsequent proponents whose total scores fall within a 10% difference of the highest score. On a 100-point scale, the margin is 10 points below the top score.

If fewer than four proponents fall within the initial 10% range, Canoe will expand the range to include the highest-ranked proponents. In this case, the score of the second last-ranked proponent becomes the new minimum score for that category.

Canoe reserves the right to limit the Competitive Range to ensure contract quality and management efficiency. Canoe will exclude any proponent whose score is more than 10 points below the top-ranked proponent unless that proponent is needed to meet the minimum award requirements.

[End of Part B]

SCHEDULE "B"

SUPPLIER RESPONSE TO THE RFP

CAN-2026-001 - Public Sector Enterprise Resource Planning (ERP) Software

Opening Date: January 21, 2026 3:28 PM

Closing Date: March 20, 2026 3:00 PM

Vendor Details

Company Name:	Zoho Canada Corporation
Does your company conduct business under any other name? If yes, please state:	Zoho Corporation
Address:	705 Cotton Mill Street, Unit 116 Cornwall, Ontario K6H 7K7
Contact:	Ian Bruce
Email:	ian@zohocorp.com
Phone:	604-833-4099
HST#:	798544268RT0001

Submission Details

Created On:	Saturday January 31, 2026 09:41:57
Submitted On:	Thursday March 19, 2026 10:32:14
Submitted By:	Ian Bruce
Email:	ian@zohocorp.com
Transaction #:	59cb250b-f7a3-465b-977a-65da6a49845f
Submitter's IP Address:	147.243.145.114

Proponents must review and complete the requirement lists and questionnaires as part of their submission.

Corporate Profile

Line Item	Question	Response *
1	Proponent Legal Name (and applicable d/b/a if any):	Zoho Canada Corporation
2	Proponent Address:	705 Cotton Mill St Unit 116, Cornwall, ON K6H 7K7
3	Proponent website address:	https://www.zoho.com/
4	Proponent's Authorized Representative (name, title, email address) (The representative must have authority to sign on behalf of the Proponent):	Chandrashekar Lalapet Srinivas Prasanna, Managing Director of Zoho Canada Corporation, shekar@zohocorp.com
5	Proponent's primary contact for this proposal (name title address email address):	Ian Bruce, VP of Sales, ian@zohocorp.com, 604 833 4099
6	Proponent's other contacts for this proposal if any (name title address email address & phone):	Purnimameenakshi Subramanian, Regional Head of Zoho Finance and Operations Unit, purnima@zohocorp.com, 343 777 9864
7	Proponent GST registration number:	798544268RT0001
8	If the Proponent is representing a consortium, each member of that consortium.	NO
9	Provide a brief history of your company, including your company's core values, business philosophy, and longevity in the industry relating to this solicitation.	Zoho serves over one million organizations worldwide, including businesses, educational institutions, and public sector organizations. The company employs a vertically integrated product development model in which the majority of its technology stack is designed, built, and operated internally. This approach allows Zoho to maintain strong control over product quality, security, and long-term innovation. Zoho operates on a privately held, profitable, and sustainable business model, free from venture capital or public market pressures. This independence enables the company to focus on long-term product development, customer value, and responsible growth rather than short-term financial objectives. Zoho's core values include customer privacy, data ownership, affordability, and technological self-reliance through in-house research and development. These principles guide the company's product design, security architecture, and customer engagement practices. To support Canadian customers, Zoho established Zoho Canada Corporation, providing localized services, Canadian data residency (in two data centers) and regional regulatory alignment. Through this presence, Zoho delivers enterprise-grade cloud platforms tailored to the needs of Canadian organizations, including municipal and public sector environments. With nearly 30 years of industry experience and a global customer base, Zoho offers a stable, secure, and scalable technology platform capable of supporting the CANOE ERP requirements and participating constituents in achieving their ERP modernization objectives.
10	Where is your headquarters located?	Global Headquarters: Chennai, India Canadian HQ: Cornwall, Ontario US HQ: Austin, Texas
11	Do you have 250 or more full time employees in Canada?	NO
12	Provide all "Suspension or Debarment" from public entities in Canada your organisation is currently subject to.	NO

ERP Solution Classification included in your submission

Canoe will award solutions in 3 distinct categories. Select the one which represents your solution.

Definitions

Integrated / Full Suite ERP Solution

A single, unified Enterprise Resource Planning system that delivers the core administrative functions—finance, HR/payroll, procurement, budgeting, taxation, utilities, reporting—within one integrated platform and one data model. These systems are designed to operate as a cohesive whole rather than as combined standalone applications.

Best-of-Breed Solution

An ERP solution delivery approach where the ERP platform provides core administrative functions, and specialized third-party applications are used for specific business needs. The ERP must expose open, well-documented APIs to support secure, reliable integration, and must remain the primary system of record for administrative data.

Municipal Specialty Systems Solution

Smaller-scope municipal systems that provide important but limited administrative functionality (such as AP automation, taxation, utility billing, or legacy finance functions) but do not constitute a full ERP solution as described above. Solutions for emergency management, land-use planning, permitting, GIS or inspections are not included in this RFP.

Category *
Integrated/full suite ERP Solution

Bill S-211 declaration

Please note that the response to the information is being collected as data collation for internal use only. The response provided has no bearing on the ability for Proponents to respond to this RFP.

Line Item	Bill S-211	Answer *
1	Does the Proponent identify itself as an "entity" as defined under the Fighting Against Forced Labour and Child Labour in Supply Chains Act or "Bill S211"? As per Bill S211 an "Entity" means a corporation or a trust, partnership or other unincorporated organization that (a) is listed on a stock exchange in Canada; (b) has a place of business in Canada, does business in Canada or has assets in Canada and that, based on its consolidated financial statements, meets at least two of the following conditions for at least one of its two most recent financial years: (i) it has at least \$20 million in assets, (ii) it has generated at least \$40 million in revenue, and (iii) it employs an average of at least 250 employees; or (c) is prescribed by regulations. Please note that the response to the information is being collected as data collation for internal use only. The response provided either yes or no has no bearing on the ability for Proponents to respond to this RFP.	☐ Yes ☒ No

Geographical coverage for offering

Identify the geographical locations included in your offering. While Canoe members are nation wide, Proponents can select to serve a defined geographical area based on their capabilities.

Line Item	Province/Territory	Do you currently offer goods in this area? *	Is this area included in your offering for this RFP *	Comments
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1	Alberta	☒ Yes ☐ No	☒ Yes ☐ No	1. Nationwide Availability Zoho SaaS ERP solutions are commercially available across all Canadian provinces and territories, including every region represented by Canoe Procurement Group members. 2. Canadian Entity & Data Residency Zoho Canada Corporation supports Canadian customers, and Zoho offers a Canadian data center (Canada DC) to meet public sector data residency and privacy expectations. 3. RFP Territory Coverage Zoho can confirm service coverage for the entire Territory of Canada (all provinces and territories), with no geographic restrictions on software access or subscription availability.
2	British-Columbia	☒ Yes ☐ No	☒ Yes ☐ No	1. Nationwide Availability Zoho SaaS ERP solutions are commercially available across all Canadian provinces and territories, including every region represented by Canoe Procurement Group members. 2. Canadian Entity & Data Residency Zoho Canada Corporation supports Canadian customers, and Zoho offers a Canadian data center (Canada DC) to meet public sector data residency and privacy expectations. 3. RFP Territory Coverage Zoho can confirm service coverage for the entire Territory of Canada (all provinces and territories), with no geographic restrictions on software access or subscription availability.
3	New-Brunswick	☒ Yes ☐ No	☒ Yes ☐ No	1. Nationwide Availability Zoho SaaS ERP solutions are commercially available across all Canadian provinces and territories, including every region represented by Canoe Procurement Group members. 2. Canadian Entity & Data Residency Zoho Canada Corporation supports Canadian customers, and Zoho offers a Canadian data center (Canada DC) to meet public sector data residency and privacy expectations. 3. RFP Territory Coverage Zoho can confirm service coverage for the entire Territory of Canada (all provinces and territories), with no geographic restrictions on software access or subscription availability.
4	Manitoba	☒ Yes ☐ No	☒ Yes ☐ No	1. Nationwide Availability Zoho SaaS ERP solutions are commercially available across all Canadian provinces and territories, including every region represented by Canoe Procurement Group members. 2. Canadian Entity & Data Residency Zoho Canada Corporation supports Canadian customers, and Zoho offers a Canadian data center (Canada DC) to meet public sector data residency and privacy expectations. 3. RFP Territory Coverage Zoho can confirm service coverage for the entire Territory of Canada (all provinces and territories), with no geographic restrictions on software access or subscription availability.
5	Newfoundland and Labrador	☒ Yes ☐ No	☒ Yes ☐ No	1. Nationwide Availability Zoho SaaS ERP solutions are commercially available across all Canadian provinces and territories, including every region represented by Canoe Procurement Group members. 2. Canadian Entity & Data Residency Zoho Canada Corporation supports Canadian customers, and Zoho offers a Canadian data center (Canada DC) to meet public sector data residency and privacy expectations. 3. RFP Territory Coverage Zoho can confirm service coverage for the entire Territory of Canada (all provinces and territories), with no geographic restrictions on software access or subscription availability.
6	Northwest Territories	☒ Yes ☐ No	☒ Yes ☐ No	1. Nationwide Availability Zoho SaaS ERP solutions are commercially available across all Canadian provinces and territories, including every region represented by Canoe Procurement Group members. 2. Canadian Entity & Data Residency Zoho Canada Corporation supports Canadian customers, and Zoho offers a Canadian data center (Canada DC) to meet public sector data residency and privacy expectations. 3. RFP Territory Coverage Zoho can confirm service coverage for the entire Territory of Canada (all provinces and territories), with no geographic restrictions on software access or subscription availability.
7	Nova-Scotia	☒ Yes ☐ No	☒ Yes ☐ No	1. Nationwide Availability Zoho SaaS ERP solutions are commercially available across all Canadian provinces and territories, including every region represented by Canoe Procurement Group members. 2. Canadian Entity & Data Residency Zoho Canada Corporation supports Canadian customers, and Zoho offers a Canadian data center (Canada DC) to meet public sector data residency and privacy expectations. 3. RFP Territory Coverage Zoho can confirm service coverage for the entire Territory of Canada (all provinces and territories), with no geographic restrictions on software access or subscription availability.

8	Nunavut	☒ Yes ☐ No	☒ Yes ☐ No	1. Nationwide Availability Zoho SaaS ERP solutions are commercially available across all Canadian provinces and territories, including every region represented by Canoe Procurement Group members. 2. Canadian Entity & Data Residency Zoho Canada Corporation supports Canadian customers, and Zoho offers a Canadian data center (Canada DC) to meet public sector data residency and privacy expectations. 3. RFP Territory Coverage Zoho can confirm service coverage for the entire Territory of Canada (all provinces and territories), with no geographic restrictions on software access or subscription availability.
9	Ontario	☒ Yes ☐ No	☒ Yes ☐ No	1. Nationwide Availability Zoho SaaS ERP solutions are commercially available across all Canadian provinces and territories, including every region represented by Canoe Procurement Group members. 2. Canadian Entity & Data Residency Zoho Canada Corporation supports Canadian customers, and Zoho offers a Canadian data center (Canada DC) to meet public sector data residency and privacy expectations. 3. RFP Territory Coverage Zoho can confirm service coverage for the entire Territory of Canada (all provinces and territories), with no geographic restrictions on software access or subscription availability.
10	Prince Edward Island	☒ Yes ☐ No	☒ Yes ☐ No	1. Nationwide Availability Zoho SaaS ERP solutions are commercially available across all Canadian provinces and territories, including every region represented by Canoe Procurement Group members. 2. Canadian Entity & Data Residency Zoho Canada Corporation supports Canadian customers, and Zoho offers a Canadian data center (Canada DC) to meet public sector data residency and privacy expectations. 3. RFP Territory Coverage Zoho can confirm service coverage for the entire Territory of Canada (all provinces and territories), with no geographic restrictions on software access or subscription availability.
11	Québec	☒ Yes ☐ No	☒ Yes ☐ No	1. Nationwide Availability Zoho SaaS ERP solutions are commercially available across all Canadian provinces and territories, including every region represented by Canoe Procurement Group members. 2. Canadian Entity & Data Residency Zoho Canada Corporation supports Canadian customers, and Zoho offers a Canadian data center (Canada DC) to meet public sector data residency and privacy expectations. 3. RFP Territory Coverage Zoho can confirm service coverage for the entire Territory of Canada (all provinces and territories), with no geographic restrictions on software access or subscription availability.
12	Saskatchewan	☒ Yes ☐ No	☒ Yes ☐ No	1. Nationwide Availability Zoho SaaS ERP solutions are commercially available across all Canadian provinces and territories, including every region represented by Canoe Procurement Group members. 2. Canadian Entity & Data Residency Zoho Canada Corporation supports Canadian customers, and Zoho offers a Canadian data center (Canada DC) to meet public sector data residency and privacy expectations. 3. RFP Territory Coverage Zoho can confirm service coverage for the entire Territory of Canada (all provinces and territories), with no geographic restrictions on software access or subscription availability.
13	Yukon	☒ Yes ☐ No	☒ Yes ☐ No	1. Nationwide Availability Zoho SaaS ERP solutions are commercially available across all Canadian provinces and territories, including every region represented by Canoe Procurement Group members. 2. Canadian Entity & Data Residency Zoho Canada Corporation supports Canadian customers, and Zoho offers a Canadian data center (Canada DC) to meet public sector data residency and privacy expectations. 3. RFP Territory Coverage Zoho can confirm service coverage for the entire Territory of Canada (all provinces and territories), with no geographic restrictions on software access or subscription availability.

Type of solution and complexity of entity served

This will be used as a quick guide for Members.

Question	Response *	Comments
Deployment model	SaaS Multi-Tenant	Zoho ERP solutions are delivered through a vendor-hosted SaaS multi-tenant architecture with logical tenant isolation, continuous updates, and Canadian data residency options. Zoho does not offer on-premise or customer-hosted deployments.
Solution Category (Full Suite ERP, Best of Breed Solution, Specialty Municipal solution)	Full Suite ERP	Zoho provides a vendor-hosted, cloud-based Software-as-a-Service (SaaS) enterprise resource planning platform delivering integrated financial management, human resources, procurement support, inventory management, reporting and analytics, workflow automation, and administrative operations required by public sector organizations. The platform combines applications including Zoho Books, Zoho Inventory, Zoho People, Zoho Payroll, Zoho Analytics, Zoho Flow, and API-based integrations, enabling organizations to manage core operational processes within a unified environment. The solution supports configurable workflows, centralized reporting, and secure integration with external systems, allowing public sector entities to modernize administrative operations while maintaining flexibility and scalability.
Complexity of entity served (Small-mid, mid-market, large complex)	Large/Complex/ Multi-Entity	Zoho ERP is designed to support organizations ranging from small and mid-sized entities to large, complex public sector environments. Its scalable, cloud-based architecture supports multi-entity and multi-department structures, enabling consolidated financial management, role-based governance, audit controls, and enterprise-grade security. Through configurable modules—including Zoho Books, Zoho Inventory, Zoho People, Zoho Payroll, Zoho Analytics, and workflow automation through Zoho Flow—the platform supports sophisticated operational workflows, reporting, and administrative functions required by municipalities, government agencies, healthcare authorities, and other large public sector organizations. Open APIs and integration tools enable seamless connectivity with legacy systems and third-party platforms, allowing Zoho to operate as a central system of record within complex IT environments while supporting phased deployments and organizational scalability.
Implementation model (Vendor-Led, Partner-Led, etc)	Hybrid	Zoho supports a flexible implementation model that includes vendor-led, partner-led, and hybrid delivery approaches. Implementations may be delivered directly by Zoho's solution engineering teams, through certified Zoho implementation partners, or through a coordinated model combining Zoho architectural oversight with partner-led deployment and localization. For large or complex public sector engagements, Zoho typically provides solution architecture guidance, platform governance, and product expertise, while regional certified partners support implementation, integration, and change management activities. This approach enables scalable delivery capacity across Canada while ensuring adherence to platform best practices and public sector requirements. Due to the platform's highly configurable SaaS architecture, organizations may also perform certain configuration and workflow customization activities internally following implementation.

Program offering

Describe your program offering.

Question	Response *
Provide a clear description of your ERP solution. Describe the core functional areas—such as finance, budgeting, procurement, commitment control, reporting, asset and inventory management, human resources, and workflow/approvals—and explain how your solution supports the business processes normally used by municipalities and broader-public-sector entities. If and when using proprietary module names, please define how they correspond to standard public-sector functions.	1. ERP Solution Description: Zoho provides a secure, cloud-native Enterprise Resource Planning (ERP) platform designed to support the administrative, financial, and operational needs of municipalities, government agencies, education institutions, and other public-sector organizations. The platform delivers an integrated suite of financial management, procurement, workforce administration, asset management, and analytics capabilities within a unified Software-as-a-Service (SaaS) environment, enabling transparency, accountability, and efficient service delivery. The Zoho ERP environment is composed of modular applications—including Zoho Books, Zoho Inventory, Zoho People, Zoho Payroll, Zoho Analytics, Zoho Creator, Zoho Flow, and secure API integrations—which together support the core administrative and financial processes commonly required by municipal and public-sector entities. 2. Financial Management (General Ledger, AP/AR, Fund Tracking): Financial management capabilities are delivered through Zoho Books and the Zoho Finance Platform, providing core ERP functionality including general ledger management, accounts payable, accounts receivable, bank reconciliation, departmental accounting, and financial controls. These capabilities support financial transparency and structured accounting practices commonly required by public-sector organizations. 3. Budgeting and Financial Planning: Budget development and monitoring are supported through Zoho Books and Zoho Analytics, enabling organizations to prepare annual budgets, track budget-versus-actual performance, and conduct financial forecasting and projections. These tools support the budgeting and financial oversight processes commonly used within municipal departments and public-sector agencies. 4. Procurement and Commitment Control: Procurement functions are supported through Zoho Procurement solutions built using Zoho Creator and integrated with Zoho Books and Zoho Inventory. These capabilities include vendor management, purchase requisitions, purchase orders, contract tracking, and multi-level approval workflows. Commitment control processes can be configured to validate spending requests against approved budgets before purchase commitments are issued. 5. Asset and Inventory Management: Asset and inventory management capabilities are delivered through Zoho Inventory and custom asset management applications developed on Zoho Creator, supporting the lifecycle management of equipment, materials, and operational assets. These tools enable inventory tracking, asset registration, maintenance scheduling, depreciation tracking, and resource availability monitoring. 6. Human Resources and Workforce Administration: Human resource management is supported through Zoho People and Zoho Payroll, which provide employee record management, recruitment workflows, time and attendance tracking, payroll administration, and workforce analytics. These capabilities help public-sector organizations manage workforce operations while maintaining compliance with employment policies and payroll regulations. 7. Workflow Automation and Approvals: Workflow automation is delivered through Zoho Creator and Zoho Flow, enabling organizations to automate internal business processes such as approvals, procurement workflows, service requests, and financial authorizations. Policy-driven approval chains, role-based access controls, and detailed audit trails support governance and accountability within municipal and government environments. 8. Reporting, Analytics, and Operational Intelligence: Reporting and analytics are delivered through Zoho Analytics, providing real-time dashboards, operational reporting, and performance monitoring across financial, workforce, and operational data. These capabilities support regulatory reporting, executive oversight, and data-driven decision-making across departments. Through its modular architecture and secure integration capabilities, Zoho ERP enables municipalities and public-sector entities to modernize administrative operations while maintaining flexibility, transparency, and strong governance over financial and operational processes.

Describe the maturity of your ERP platform, including years in market, installed base in Canada, and the number and type of public-sector clients currently using your solution.	ERP Platform Maturity: Zoho's ERP platform is built on more than 25 years of enterprise software development experience. Founded in 1996, Zoho has developed a comprehensive portfolio of cloud-based business applications that collectively provide ERP functionality supporting finance, procurement, human resources, inventory and asset management, analytics, and workflow automation. Zoho's software platform currently supports over 120 million users worldwide and more than a million organizations, demonstrating strong global adoption and long-term platform maturity. Zoho employs over 19,000 staff globally, with a significant portion of its workforce dedicated to research and development. The company follows a vertically integrated product development model in which the majority of its technology stack—including infrastructure management, application development, and platform services—is designed and maintained internally. This approach enables Zoho to maintain strong control over product security, reliability, and long-term innovation. In Canada, Zoho maintains a growing presence supported by Canadian operations and dedicated Canadian data centre infrastructure. Zoho solutions are used by thousands of Canadian organizations across both private and public sectors, including municipalities, educational institutions, non-profit organizations, and government agencies. Within the public sector specifically, Zoho solutions are currently used by approximately 15 municipal organizations and provincial governments in Canada, along with a broader range of public-sector entities globally, including regulatory agencies, educational institutions, and healthcare organizations. These organizations leverage Zoho's platform for financial management, procurement automation, workforce administration, operational applications, and data analytics. Zoho's SaaS platform is continuously enhanced through regular product updates and feature releases delivered through a controlled cloud release cycle, ensuring customers benefit from ongoing innovation, security improvements, and regulatory alignment without requiring disruptive system upgrades. This sustained development, combined with strong global adoption and deep engineering investment, demonstrates a mature and scalable ERP platform capable of supporting modern government administration.
Describe your product roadmap for the next 36 months, including planned functional enhancements, architectural changes, module expansions, and end-of-life notices. State your release cadence and how you communicate changes to clients.	1. Product Roadmap and Release Management: Zoho maintains a continuous innovation roadmap focused on expanding ERP capabilities, strengthening cloud architecture, and enhancing analytics and automation to meet evolving enterprise and public-sector requirements. Over the next 36 months, Zoho will continue to invest in functional enhancements, platform scalability, integration capabilities, and regulatory alignment across its ERP ecosystem. 2. Planned Functional Enhancements: Zoho will continue expanding capabilities across financial management, procurement, workforce administration, asset and inventory management, and analytics. Planned improvements include enhanced budgeting and financial planning tools, expanded procurement automation, improved asset lifecycle management, advanced reporting and forecasting capabilities, and deeper operational analytics. Zoho is also investing in AI-assisted insights, predictive analytics, and intelligent workflow automation to help organizations improve operational efficiency and data-driven decision-making. 3. Architectural Evolution: Zoho will continue strengthening its cloud-native SaaS architecture, focusing on scalability, performance optimization, API-first integration capabilities, and enhanced security frameworks. Architectural improvements include expanded REST APIs, event-driven integration capabilities, enhanced interoperability between Zoho applications, and improved connectivity with external enterprise systems. Continued investment in compliance frameworks, data governance controls, and regional infrastructure will further support global public-sector requirements. 4. Module Expansion: The Zoho platform will continue to expand through enhancements to existing applications—including Zoho Books, Zoho Inventory, Zoho People, Zoho Payroll, Zoho Analytics, and Zoho Flow—as well as through extended capabilities built on Zoho's low-code development platform. This enables organizations to extend ERP functionality through custom workflows, applications, and integrations without complex development. 5. Release Cadence: Zoho follows a continuous delivery model, providing regular incremental updates, feature enhancements, and security improvements throughout the year. Minor updates and improvements are released frequently, while larger feature enhancements are delivered several times annually across platform modules. 6. Client Communication and Change Management: Zoho communicates platform updates and changes through release notes, in-application notifications, customer newsletters, webinars, and partner communications. Customers receive advance notice of significant feature changes or architectural updates where applicable. Zoho maintains strong backward compatibility across releases and provides guidance and migration support when functionality approaches end-of-life to ensure a smooth transition for customers.
Include the third party certifications you have related to ERP systems cloud storage such as ISO, ANSI, CSA, SOC etc.	1. Third-Party Certifications and Compliance Standards: Zoho maintains a comprehensive security and compliance framework supported by independent third-party certifications and audits applicable to cloud-based ERP platforms and data hosting environments. Details of Zoho's current certifications and compliance posture are available at https://www.zoho.com/compliance.html 2. ISO Certifications: Zoho's cloud infrastructure and SaaS services are certified under several International Organization for Standardization (ISO) standards, including: a. ISO/IEC 27001 – Information Security Management System (ISMS) b. ISO/IEC 27017 – Security controls for cloud services c. ISO/IEC 27018 – Protection of personally identifiable information (PII) in public cloud environments d. ISO/IEC 27701 – Privacy Information Management System (PIMS) These certifications demonstrate adherence to internationally recognized best practices for information security governance, privacy protection, and secure cloud service operations. 3. SOC Compliance: Zoho undergoes independent audits under the Service Organization Control (SOC) framework: SOC 2 Type II – Validates the effectiveness of Zoho's controls related to security, availability, confidentiality, and privacy over an extended audit period. 4. Cloud Security Standards: Zoho also participates in recognized cloud security assurance frameworks including: CSA STAR (Cloud Security Alliance Security Trust Assurance and Risk Registry) – Demonstrating alignment with cloud security best practices and transparency in security controls. 5. Canadian Data Residency and Privacy Alignment: Zoho provides Canadian data residency options through its primary data center in Toronto, Ontario, with a geographically separate disaster recovery facility in Montreal, Quebec. This infrastructure allows Canadian public-sector organizations to maintain data within Canadian jurisdiction while supporting high availability and business continuity. Zoho's platform is designed using privacy-by-design principles and supports compliance with Canadian privacy legislation, including the Personal Information Protection and Electronic Documents Act (PIPEDA). Administrative, technical, and physical safeguards are implemented to protect personal information managed by public-sector organizations. 6. Additional Security Controls Zoho implements additional security measures across its cloud platform including: a. TLS 1.2+ encryption for data in transit b. AES-256 encryption for data at rest c. Continuous vulnerability monitoring and penetration testing d. Independent third-party security assessments Together, these certifications, controls, and infrastructure investments demonstrate Zoho's commitment to providing a secure, compliant, and enterprise-grade cloud environment suitable for ERP deployments in Canadian government and public-sector organizations.

Identify the platform(s) who host your solution, where customer data is stored, processed, and backed up (primary, secondary, disaster recovery). Describe your security certifications, data protection practices, access controls, and incident-response protocols applicable to Canadian public-sector organizations.	1. Hosting Platform, Data Residency, and Security Controls: Zoho's ERP solutions are delivered through Zoho's proprietary cloud infrastructure, which is designed, owned, and operated entirely by Zoho Corporation. Unlike many SaaS vendors that rely on third-party hyperscale cloud providers, Zoho operates its own global network of secure data centers. This approach allows Zoho to maintain direct control over infrastructure security, platform reliability, and operational governance while providing a consistent cloud environment for enterprise and public-sector customers. 2. Data Residency and Hosting Locations: For Canadian customers, Zoho provides Canadian data residency through its primary production data center located in Toronto, Ontario, with a geographically separate disaster recovery facility located in Montreal, Quebec. Customer data for Canadian deployments is stored and processed within this Canadian infrastructure, supporting public-sector requirements related to data sovereignty and regulatory compliance. The hosting architecture includes: a. Primary Production Environment: Toronto, Canada b. Disaster Recovery Environment: Montreal, Canada c. Data Replication: Real-time or near real-time replication between facilities d. Backup Storage: Encrypted backups maintained in redundant storage locations within Zoho's infrastructure This architecture supports high availability, business continuity, and rapid recovery in the event of infrastructure disruption. 3. Security Certifications and Compliance: Zoho's cloud infrastructure is certified and audited under internationally recognized security standards, including: a. ISO/IEC 27001 – Information Security Management System b. ISO/IEC 27017 – Cloud Security Controls c. ISO/IEC 27018 – Protection of Personally Identifiable Information in Public Clouds d. ISO/IEC 27701 – Privacy Information Management System e. SOC 2 Type II – Independent audit validating security, availability, confidentiality, and privacy controls f. CSA STAR – Cloud Security Alliance security assurance framework These certifications validate Zoho's operational controls for protecting customer data and maintaining secure cloud environments. 4. Data Protection Practices Zoho implements layered security and data protection practices across its ERP platform, including: a. TLS 1.2+ encryption for all data in transit b. AES-256 encryption for data at rest c. Network security controls including firewalls, intrusion detection and prevention systems d. Continuous vulnerability monitoring and regular third-party penetration testing e. Secure Software Development Lifecycle (SSDLC) practices embedded across product development f. Logical tenant-level data isolation ensuring strict separation between customer environments Zoho maintains a strict data ownership and privacy policy in which customers retain full ownership and control of their data. Zoho does not sell customer data, use customer data for advertising, or monetize customer information through third-party data sharing. 5. Access Controls Access to the platform is governed through enterprise-grade identity and access management controls, including: a. Role-based access control (RBAC) b. Multi-factor authentication (MFA) c. Single sign-on (SSO) integration via SAML and OAuth d. IP-based access restrictions e. Detailed audit logging of user activity f. Privileged access to infrastructure and production environments is tightly controlled through internal access governance procedures and monitored administrative access policies. 6. Incident Response and Security Operations: Zoho maintains a 24/7 Security Operations Center (SOC) responsible for continuous monitoring, threat detection, and incident response. The incident response program includes defined escalation procedures, regulatory notification protocols where applicable, post-incident analysis, and regular testing of disaster recovery and business continuity processes. Together, Zoho's infrastructure architecture, security certifications, data protection practices, and operational monitoring provide a secure, resilient, and compliant hosting environment suitable for ERP deployments within Canadian public-sector organizations.
Describe your upgrade process, including frequency, required customer involvement, backward-compatibility, test environments, and support for customizations or third-party components during upgrades	Upgrade and Release Management Process Zoho delivers its ERP platform as a cloud-based Software-as-a-Service (SaaS) solution, where upgrades, security updates, and feature enhancements are centrally managed by Zoho and deployed through a controlled cloud release process. This model ensures customers always operate on the latest supported version of the platform without requiring complex upgrade projects or infrastructure management. 1. Upgrade Frequency: Zoho follows a continuous delivery model, providing incremental updates throughout the year. Minor improvements, performance enhancements, and security patches are released frequently, while larger feature enhancements are delivered periodically across platform modules. These updates are deployed automatically within Zoho's cloud infrastructure. 2. Customer Involvement: Because Zoho manages both the infrastructure and application layers, customers are not required to perform manual upgrade activities. Updates are applied transparently with minimal service disruption. Customers are informed of functional enhancements and notable changes through product release notes, documentation updates, and product announcements. 3. Backward Compatibility: Zoho maintains a strong commitment to backward compatibility across platform updates. Existing configurations, workflows, APIs, and integrations are designed to continue functioning across releases. Where architectural changes or feature deprecations may affect existing implementations, Zoho provides advance notice, technical documentation, and migration guidance to ensure a smooth transition. 4. Testing and Sandbox Environments: Zoho provides sandbox and testing environments for many platform applications, enabling organizations to validate configuration changes, integrations, and workflow updates prior to deploying them into production environments. These environments allow public-sector organizations to conduct system testing, user acceptance testing (UAT), and process validation before operational rollout. 5. Support for Customizations and Integrations: Zoho ERP solutions support extensive configuration and low-code customization through tools such as Zoho Creator, workflow automation, and API integrations. Because these customizations are built on supported platform frameworks, they are preserved across upgrades. Zoho maintains stable APIs and provides updated developer documentation to ensure compatibility with third-party integrations. 6. Maintenance and Change Communication: Zoho communicates platform updates through release notes, in-application notifications, customer newsletters, and partner communications. Where scheduled maintenance or significant platform changes are required, customers are notified in advance to ensure operational awareness and planning. Through this structured upgrade approach, Zoho delivers continuous innovation, platform stability, and minimal operational disruption, allowing public-sector organizations to benefit from ongoing enhancements without the cost and complexity associated with traditional ERP upgrade cycles.

Describe the configuration tools, low-code/no-code capabilities, and workflow engines available to clients. Identify which capabilities business users can configure without vendor or partner intervention.	Configuration Tools, Low-Code/No-Code Capabilities, and Workflow Automation Zoho ERP provides a comprehensive set of configuration tools, low-code/no-code development capabilities, and workflow automation engines that allow organizations to configure and extend business processes without requiring extensive programming or vendor intervention. These capabilities allow public-sector organizations to adapt the system as operational, regulatory, or reporting requirements evolve. All configuration and workflow changes are governed through role-based permissions, change tracking, and audit logs, ensuring organizations maintain transparency, accountability, and internal control over system modifications. 1. Configuration Tools: Core ERP applications such as Zoho Books, Zoho Inventory, Zoho People, and Zoho Payroll include built-in administrative configuration tools that allow organizations to tailor financial and operational processes directly within the application. Administrative users can configure: a. Custom fields and record layouts b. Chart of accounts and financial structures c. Tax rules and compliance settings d. Approval hierarchies and authorization levels e. Document templates and transaction formats f. Financial reports and dashboards g. Role-based permissions and user access controls These configuration tools allow organizations to adapt system behavior while maintaining governance and internal controls. 2. Low-Code / No-Code Application Platform: Zoho ERP can be extended using Zoho Creator, Zoho's low-code development platform. Zoho Creator enables organizations to build custom applications, data models, and business workflows that integrate directly with ERP modules. Using a visual development environment, organizations can: a. Design forms and data models b. Create operational applications c. Automate processes and workflows d. Build dashboards and reporting tools e. Integrate with external systems For more advanced use cases, Zoho Creator supports scripting through Deluge, Zoho's automation language, allowing additional logic and system interactions while remaining within a governed platform environment. 3. Workflow Automation Zoho ERP includes multiple workflow automation capabilities across the platform: a. Native workflow engines within Zoho applications for approvals, notifications, and automated actions b. Zoho Flow for cross-application automation and integration c. Zoho Creator workflows for advanced process orchestration and custom operational applications d. Workflows can be triggered by a variety of events including record creation, transaction updates, scheduled events, approval stages, or external system triggers through APIs. These capabilities support common public-sector workflows such as procurement approvals, financial authorizations, employee onboarding, service request processing, and compliance reporting. 4. Capabilities Configurable by Business Users: Many system configurations can be managed directly by trained business administrators or power users without vendor or partner intervention. These capabilities include: a. Creating and modifying custom fields, forms, and document templates b. Designing financial and operational reports and dashboards c. Configuring approval workflows and automated alerts d. Managing user roles, permissions, and access controls e. Creating workflow automations within ERP modules f. Building custom operational applications using Zoho Creator g. Connecting systems using APIs or prebuilt connectors through Zoho Flow This flexible configuration framework enables organizations to maintain operational agility while preserving governance, auditability, and compliance controls, allowing internal teams to continuously improve processes without relying heavily on external development resources.
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Describe if and how your solution supports multi-entity, multi-department, or shared-services environments, including controls, reporting, and segregation of duties.	Multi-Entity, Multi-Department, and Shared Services Support Zoho ERP supports multi-entity, multi-department, and shared-services environments, enabling municipalities and public-sector organizations to manage multiple organizational units within a unified financial and operational platform while maintaining strong governance, reporting transparency, and segregation of duties. 1. Multi-Entity and Organizational Structure: Zoho ERP applications, including Zoho Books and Zoho Analytics, support multi-organization structures that allow public-sector entities to manage separate departments, programs, agencies, or operational units within a coordinated system environment. Organizations can establish separate entities or financial environments while maintaining centralized administrative oversight. Within each entity, financial data can be structured using departments, projects, cost centers, and tagging frameworks, allowing transactions to be categorized and reported according to program, service area, or organizational unit. This structure supports municipal environments where centralized administrative teams provide services across multiple departments or operational divisions. 2. Shared Services Operations: Zoho ERP supports shared-services operating models, where centralized finance, procurement, HR, or administrative teams manage processes for multiple departments or entities. Configurable workflows enable centralized teams to process transactions on behalf of multiple organizational units while maintaining proper approvals, accountability, and reporting segregation. 3. Financial Controls and Governance: Zoho Books provides configurable financial controls that support governance and financial management requirements within public-sector organizations. Administrators can define: a. Department-level or program-level budgets b. Approval hierarchies for financial transactions c. Spending controls and authorization limits d. Policy-driven workflows for procurement and payments These controls ensure that financial activities align with approved budgets and organizational policies. 4. Segregation of Duties: Zoho ERP enforces segregation of duties through role-based access control (RBAC). Administrators can assign permissions based on defined roles such as finance staff, department managers, procurement officers, or auditors. This allows organizations to separate responsibilities for key activities such as: a. Transaction entry b. Approval and authorization c. Payment processing d. Financial reconciliation and auditing Access permissions can also be restricted based on department, function, or operational responsibilities, helping organizations enforce governance policies and reduce operational risk. 5. Reporting, Consolidation, and Auditability: Zoho ERP provides comprehensive reporting capabilities through Zoho Books and Zoho Analytics, allowing organizations to generate financial and operational reports at multiple levels, including: a. Department-level reporting b. Program or project-level analysis c. Entity-level financial statements d. Consolidated reporting across multiple organizational units In addition, the platform maintains detailed audit logs and transaction histories, enabling organizations to trace financial activities, approvals, and system changes across departments and entities. These audit capabilities support transparency, compliance reviews, and internal or external audits commonly required within public-sector environments. Through these capabilities, Zoho ERP enables centralized financial governance with decentralized operational management, supporting the administrative structures commonly used within municipalities and broader public-sector organizations.
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Describe your reporting and analytics capabilities, including built-in reports, self-service tools, data export methods, and support for external BI platforms.	Reporting and Analytics Capabilities Zoho ERP provides comprehensive reporting and analytics capabilities that enable public-sector organizations to monitor financial performance, operational activity, and compliance requirements through built-in reporting tools, self-service analytics capabilities, and integration with advanced business intelligence platforms. 1. Built-in Reports and Operational Dashboards: Core ERP applications such as Zoho Books provide a wide range of preconfigured financial and operational reports commonly required by public-sector organizations. These include: a. General Ledger b. Trial Balance c. Profit and Loss / Income Statements d. Cash Flow Statements e. Accounts Payable and Accounts Receivable Aging f. Budget vs. Actual Reporting g. Tax and compliance reporting In addition to these reports, built-in dashboards provide real-time visibility into key financial and operational indicators such as revenue, expenditures, outstanding receivables, vendor payments, and cash position. These dashboards help departments and finance teams monitor financial performance and operational activity. 2. Self-Service Reporting and Customization: Zoho ERP supports self-service reporting capabilities that allow authorized users to create custom reports and dashboards without requiring vendor or technical intervention. Business users can: a. Apply filters and conditional logic b. Group and summarize data by department, project, or program c. Create calculated fields and metrics d. Configure custom dashboards e. Schedule automated report generation and distribution These tools enable departmental users and administrators to generate reports tailored to operational, financial, or regulatory reporting needs. 3. Advanced Analytics and Data Exploration: Zoho ERP integrates with Zoho Analytics, Zoho's advanced business intelligence platform. Zoho Analytics provides capabilities such as: a. Interactive dashboards and visualizations b. Cross-module analysis across finance, procurement, HR, and operations c. Automated data preparation and modeling d. Predictive analytics and trend analysis e. AI-assisted insights and natural language data exploration These capabilities allow organizations to analyze performance across departments, identify trends, and support data-driven decision-making. 4. Data Export and Integration: Zoho ERP supports multiple methods for exporting and accessing data. Financial and operational data can be exported in common formats including CSV, Excel, and PDF, enabling organizations to share information for regulatory reporting, financial reviews, and audit processes. In addition, Zoho provides secure REST APIs that allow organizations to extract or synchronize data with external systems and reporting environments. 5. Integration with External Business Intelligence Platforms: Zoho ERP supports integration with external analytics platforms through APIs and data connectors. Organizations can connect ERP data to external BI tools such as Microsoft Power BI, Tableau, and other enterprise analytics environments, enabling consolidated reporting across multiple enterprise systems. Through these reporting and analytics capabilities, Zoho ERP enables public-sector organizations to maintain financial transparency, operational oversight, and evidence-based decision-making while supporting internal governance and regulatory reporting requirements.
Describe how your solution supports public-sector financial controls, including approval workflows, delegation of authority, commitment control, audit trails, and compliance reporting.	1. Public-Sector Financial Controls: Zoho ERP provides financial governance capabilities designed to support the internal control frameworks commonly required by municipalities and public-sector organizations. The platform enables organizations to enforce financial policies, maintain accountability, and ensure transparent financial management through configurable workflows, role-based access controls, audit logging, and reporting tools. 2. Approval Workflows: Zoho ERP applications such as Zoho Books provide configurable approval workflows that allow organizations to define multi-level authorization processes for financial transactions including purchase requisitions, purchase orders, invoices, expenses, and payments. Approval rules can be configured based on criteria such as transaction value, department, vendor, project, or funding source. Automated notifications and approval routing ensure that financial transactions are reviewed and authorized by the appropriate personnel before commitments or payments are finalized. These workflows support policy-driven financial controls and help enforce internal governance procedures. 3. Delegation of Authority: Zoho ERP supports delegation-of-authority frameworks through role-based approval hierarchies. Administrators can define approval levels aligned with organizational policies and financial thresholds. Specific approval permissions can be assigned to managers, department heads, finance officers, or designated delegates. This structure allows organizations to enforce financial authorization limits while maintaining flexibility for departmental operations. 4. Commitment Control: Zoho ERP enables organizations to track financial commitments through the procurement and purchasing lifecycle. When purchase requisitions, purchase orders, or expense requests are initiated, the system can validate transactions against budget allocations maintained within the financial system. This capability allows organizations to monitor spending commitments before payments are issued, supporting budget discipline and helping prevent unauthorized or overspending against approved budgets. 5. Audit Trails and Transaction Traceability Zoho ERP maintains comprehensive audit trails across financial transactions and system activities. Actions such as record creation, modification, approval, deletion, and configuration changes are automatically logged with timestamps and user identification. These audit logs provide full traceability of financial activities and system interactions, enabling organizations to support internal audits, compliance reviews, and external financial audits. 6. Compliance Reporting: Zoho ERP provides built-in financial reporting capabilities including general ledger, trial balance, transaction history, budget tracking, and financial statement reports. These reports allow organizations to monitor financial performance and compliance with internal policies. When integrated with Zoho Analytics, organizations can generate advanced dashboards and compliance reporting across departments, programs, or entities. These analytics capabilities support transparency, regulatory reporting, and evidence-based financial oversight. Through these capabilities, Zoho ERP enables public-sector organizations to implement structured financial governance, enforce internal control policies, and maintain accountability across financial operations.

Do Canoe members have the ability to choose or restrict the hosting region (including test, staging, and analytics environments)? Can the customer prohibit cross-region failover?	Hosting Region Selection and Data Residency Controls Yes. Zoho ERP environments, including Zoho Books and related platform services, allow CANOE members to select the geographic region in which their data is hosted. 1. Hosting Region Selection: When a Zoho Books organization is created, customers can select the Canada data center region for hosting. This ensures that the primary production environment stores and processes application data within Zoho's Canadian infrastructure. 2. Test, Staging, and Analytics Environments: Where sandbox, testing, or analytics environments are provisioned (for example through Zoho platform services such as Zoho Creator or Zoho Analytics), these environments are typically deployed within the same Canadian regional infrastructure as the primary production environment. This approach helps maintain consistent data residency, security policies, and governance controls across production and non-production environments. 3. Disaster Recovery and Regional Replication: Zoho operates a high-availability architecture within Canada, consisting of a primary production data center located in Toronto, Ontario, and a geographically separate disaster recovery facility located in Montreal, Quebec. Data replication between these facilities supports business continuity and rapid recovery in the event of a service disruption. As part of Zoho's managed SaaS infrastructure, this replication and failover capability is built into the platform's resiliency architecture and cannot be disabled by individual customers, ensuring that service availability and disaster recovery protections remain consistent across the platform. During failover events, customer data remains within Zoho's Canadian infrastructure and does not leave Canada. 4. Customer Administrative Controls: Customers maintain administrative control over their ERP environment, including user access management, configuration settings, workflow controls, and data governance policies. Zoho's infrastructure design ensures high availability and strong security while maintaining Canadian data residency and regulatory alignment for public-sector organizations.
Describe how your solution meets accessibility requirements, keyboard navigation, screen-reader compatibility, and mobile usability for public-sector staff.	Accessibility, Keyboard Navigation, and Mobile Usability Zoho ERP applications, including Zoho Books and related platform components, are designed to support accessibility requirements relevant to public-sector organizations. The platform incorporates accessibility practices aligned with the Web Content Accessibility Guidelines (WCAG) 2.1 Level A and AA, supporting inclusive access for users with diverse accessibility needs. These practices help organizations meet accessibility expectations such as those defined by the Accessibility for Ontarians with Disabilities Act (AODA) and other public-sector accessibility frameworks. 1. Keyboard Navigation: Zoho ERP applications provide keyboard-accessible navigation, enabling users to move through menus, forms, data tables, and operational screens using standard keyboard commands. Users can perform common tasks—including data entry, approvals, navigation between records, and report access—without relying on a mouse or pointing device. Keyboard shortcuts and structured navigation support efficient interaction for users with mobility impairments or those who rely on assistive technologies. 2. Screen Reader Compatibility: The user interface is designed to support screen reader technologies, enabling assistive software to interpret and read on-screen content for visually impaired users. Interface elements are structured using semantic HTML and clearly labeled form fields, allowing screen readers to identify navigation elements, input fields, and system notifications. This structured layout helps guide users through financial and operational workflows while ensuring system information is accessible through assistive technologies. 3. Mobile Usability: Zoho ERP applications provide responsive web interfaces and dedicated mobile applications for iOS and Android devices. The responsive design automatically adapts system screens to different device sizes, allowing users to securely access ERP functions from desktops, tablets, and mobile devices. Mobile applications support common operational activities such as expense submissions, invoice approvals, financial monitoring, and workflow approvals. 4. Continuous Accessibility Improvements: Zoho continuously enhances accessibility and usability through ongoing product updates, user experience improvements, and feedback from customers and accessibility standards bodies. These improvements help public-sector organizations support inclusive workplace practices and digital accessibility initiatives for staff interacting with ERP systems.
List and describe all agreements that govern the use, support, hosting, and management of your ERP solution.	Agreements Governing Use, Support, Hosting, and Management Zoho ERP services are governed by a set of standard agreements and policy documents that define the contractual, operational, security, and privacy framework for the delivery and management of Zoho's cloud-based services. These agreements establish the rights and responsibilities of both Zoho and the customer and collectively govern the use, hosting, support, and management of the ERP platform. 1. Zoho Master Subscription Agreement (MSA) The Zoho Master Subscription Agreement forms the primary contractual agreement between Zoho and the customer. It defines the terms under which Zoho provides access to its cloud-based applications, including licensing terms, service usage rights, acceptable use policies, customer responsibilities, service availability provisions, and limitations of liability. The MSA governs the use of Zoho ERP applications such as Zoho Books, Zoho Inventory, Zoho People, Zoho Payroll, and related platform services. 2. Zoho Terms of Service Zoho's Terms of Service define the general conditions governing the use of Zoho's SaaS platform. These terms describe account management, service access conditions, permitted usage, platform modifications, and customer obligations when using Zoho applications and infrastructure. 3. Data Processing Agreement (DPA) The Zoho Data Processing Agreement outlines how Zoho processes, stores, and protects customer data within its cloud infrastructure. It defines responsibilities related to data privacy, security safeguards, and customer data ownership. The DPA also describes Zoho's role as a data processor and outlines compliance with applicable data protection regulations and privacy frameworks. 4. Zoho Privacy Policy Zoho's Privacy Policy explains how personal information is collected, used, stored, and protected when customers use Zoho services. It provides transparency regarding Zoho's privacy practices and reinforces Zoho's commitment to protecting customer data and respecting user privacy. 5. Service Level and Support Policies Zoho maintains service support policies that describe the support services provided to customers, including support channels, response procedures, issue resolution processes, and operational support commitments. These policies govern how customers receive assistance, report incidents, and obtain ongoing technical support for Zoho ERP applications. 6. Security and Compliance Documentation Zoho provides detailed documentation describing its security controls, infrastructure architecture, certifications, and compliance frameworks. These materials outline Zoho's data protection practices, encryption standards, operational safeguards, and incident response procedures that protect customer data within the cloud environment. Together, these agreements and policies establish the legal, operational, security, and privacy framework governing the delivery, hosting, support, and ongoing management of Zoho ERP services for customers, including public-sector organizations.

List anything else you would like to include as part of your offering.	Additional Value Included in the Offering In addition to the capabilities described above, Zoho provides several additional platform advantages that support long-term success for public-sector organizations adopting a modern ERP platform. 1. Integrated Application Ecosystem Zoho ERP operates within the broader Zoho ecosystem of business applications, which includes solutions for finance, procurement, customer relationship management, analytics, document management, collaboration, and workflow automation. This integrated environment allows organizations to expand capabilities while maintaining a consistent security model and reducing integration complexity. 2. Low-Code Platform for Process Innovation Through Zoho Creator, organizations can build custom applications, workflows, and data models that extend ERP capabilities without requiring traditional software development. This enables municipalities and public agencies to digitize additional operational processes quickly and adapt to evolving service delivery needs. 3. Advanced Analytics and Data Insights Zoho integrates with Zoho Analytics, providing advanced dashboards, cross-system reporting, predictive insights, and automated data analysis. These tools enable leadership teams to monitor operational performance, analyze financial trends, and support evidence-based decision-making. 4. Integration and Open API Framework Zoho provides a comprehensive API and integration framework that allows organizations to connect ERP data with external enterprise systems, including procurement platforms, banking systems, payment gateways, GIS systems, and external reporting environments. 5. Mobile Access and Remote Operations Zoho ERP applications provide responsive web interfaces and dedicated mobile applications for iOS and Android, enabling staff to securely review transactions, approve workflows, submit expenses, and monitor financial activity from remote or field environments. 6. Continuous Product Innovation Zoho follows a continuous delivery model, providing regular feature enhancements, security updates, and performance improvements without requiring disruptive system upgrades. This approach allows customers to benefit from ongoing innovation while maintaining platform stability. 7. Training and Customer Enablement Zoho provides extensive onboarding and enablement resources, including product documentation, knowledge bases, training materials, webinars, and customer support channels to support successful implementation and long-term adoption. 8. Security, Compliance, and Data Privacy Zoho maintains a strong security and compliance posture supported by internationally recognized certifications and security practices. The platform incorporates privacy-by-design principles and provides Canadian data residency options, supporting public-sector data governance requirements. 9. Scalable and Modular Platform Architecture Zoho ERP is designed with a modular architecture that allows organizations to begin with core financial management and expand into additional capabilities such as procurement automation, workforce management, asset tracking, analytics, and workflow automation as requirements evolve. Together, these capabilities provide CANOE members with a flexible, scalable, and continuously evolving ERP platform designed to support modern public-sector administration and long-term digital transformation. Zoho operates as a privately held and profitable technology company, enabling sustained investment in product innovation, infrastructure, and customer success over the long term.
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Core ERP Capability Coverage

Proponents must base responses on the capabilities of their ERP platform, not on a specific client’s implementation.

ADD N/A if no answer

- Identify which features are native, which require configuration, which require customization, and which rely on third-party applications.
- Cite **evidence** (e.g., published documentation, release notes, client deployment patterns).
- Avoid marketing statements that do not provide measurable facts.
- Disclose any assumptions used in classifying a capability.

Evaluation will score the completeness, clarity, evidence, and practicality of proposed approaches required for a delivery of your program offering.

Capability Category	Offered *	Name and Description *	Native (OOB) Support *	If not Native: Configuration *	Requires Customization *	Third-Party Required *	Known Limitations *	Typical use case that require customization or 3rd party *	Evidence
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Finance	☒ Yes ☐ No	Zoho Books – Financial Management Platform Zoho Books is a secure, cloud-based financial management application that forms a core component of the Zoho ERP platform. It provides comprehensive capabilities for managing accounting, financial transactions, budgeting, procurement-related financial controls, and reporting within a unified SaaS environment. The system is designed to support the financial management requirements of organizations ranging from small operational units to complex multi-department public-sector environments. Zoho Books provides a complete general ledger framework, including accounts payable, accounts receivable, bank reconciliation, expense management, invoicing, and financial reporting. Organizations can configure their chart of accounts, tax structures, approval workflows, and financial policies to align with internal governance requirements. Built-in automation features help streamline financial processes such as invoice processing, payment tracking, and expense approvals. The platform supports departmental and project-based financial tracking, allowing organizations to allocate transactions to departments, programs, or cost centers. This structure enables public-sector entities to maintain clear financial oversight across multiple operational units while supporting consolidated financial reporting. Zoho Books also includes strong audit and compliance capabilities, including transaction-level audit trails, role-based access controls, and configurable approval hierarchies. These features help organizations maintain transparency, enforce financial controls, and support internal and external audits. The system integrates seamlessly with other Zoho applications—including Zoho Analytics, Zoho Creator, Zoho Inventory, and Zoho Flow—allowing organizations to extend financial operations with procurement automation, analytics dashboards, workflow automation, and custom applications. Delivered as a cloud-native SaaS platform, Zoho Books provides secure remote access through web browsers and mobile applications while ensuring continuous updates, data protection, and high availability. This makes it well suited for modern public-sector organizations seeking efficient, transparent, and scalable financial management solutions.	☒ Yes ☐ No	☐ Yes ☒ No	☐ Yes ☒ No	☐ Yes ☒ No	1. Zoho Books primarily focuses on accounting and financial management; broader ERP capabilities such as advanced procurement workflows or operational process management may require integration with other Zoho applications (https://www.zoho.com/books/help/integrations/). Zoho Books includes basic inventory tracking features, while advanced inventory management, warehouse operations, and logistics capabilities are typically handled through Zoho Inventory (https://www.zoho.com/books/help/items/inventory.html). Zoho Books allows multiple organizations to be managed separately, but consolidated reporting across entities generally requires Zoho Analytics for advanced financial consolidation (https://www.zoho.com/analytics/help/zoho-books/). No offline support Zoho Books supports configurable fields, workflows, and automation, more complex customizations or specialized workflows may require extensions through Zoho Creator or API integrations (https://www.zoho.com/books/api/v3/).	N/A	https://www.zoho.com/ca/books/ https://www.zoho.com/ca/books/whats-new.html https://www.zoho.com/blog/books https://help.zoho.com/portal/en/community/zoho-books https://www.zoho.com/ca/books/help/getting-started/welcome.html https://www.zoho.com/books/api/v3/introduction/#organization-id
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Procurement	☒ Yes ☐ No	Zoho Procurement – Procurement and Purchasing Management End-to-End Procurement Management – Zoho Procurement supports the complete procurement lifecycle including vendor management, purchase requisitions, purchase orders, approvals, and invoice processing. Vendor and Supplier Management – The platform maintains a centralized vendor database, enabling organizations to manage supplier information, monitor vendor performance, and track procurement activities. Approval Workflows and Governance – Configurable approval hierarchies and spending thresholds ensure procurement requests follow organizational policies and financial controls. Financial Integration – Procurement transactions integrate with Zoho Books, enabling accurate tracking of commitments, expenses, and payments. Reporting and Analytics – Built-in reporting and analytics help organizations monitor procurement spending, vendor utilization, and budget alignment.	☒ Yes ☐ No	☐ Yes ☒ No	☐ Yes ☒ No	☐ Yes ☒ No	Same as Zoho Books Limitation	N/A	https://www.zoho.com/procurement/ https://www.zoho.com/procurement/procurement-management/ https://www.zoho.com/ca/procurement/help/getting-started/welcome/ https://help.zoho.com/portal/en/community/zoho-procurement https://www.zoho.com/procurement/academy/Sa
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Human Resources / Payroll (if applicable to your suite)	☒ Yes ☐ No	Zoho Payroll – Payroll and Compliance Management Zoho Payroll is a cloud-based payroll management solution designed to help organizations automate employee payroll processing while ensuring compliance with regional tax and labor regulations. The platform enables businesses to manage employee compensation, statutory deductions, tax calculations, and payroll reporting within a secure and centralized system. Zoho Payroll allows organizations to process payroll efficiently by automating salary calculations, tax withholdings, benefits deductions, and direct deposits. It maintains employee payroll records and provides detailed pay slips, payroll reports, and year-end tax documents. The system also supports employee self-service features, enabling staff to access pay slips, tax forms, and payroll information securely. The platform integrates seamlessly with Zoho Books, allowing payroll expenses, liabilities, and payments to be automatically recorded within the financial management system. Zoho Payroll also supports role-based access controls, audit logs, and automated compliance updates to help organizations maintain transparency and regulatory compliance. Delivered as a cloud-based SaaS application, Zoho Payroll provides secure access through web and mobile platforms while ensuring accurate payroll processing and streamlined payroll administration.	☒ Yes ☐ No	☐ Yes ☒ No	☐ Yes ☒ No	☐ Yes ☒ No	Same as Zoho Books Limitation	N/A	https://www.zoho.com/en-ca/payroll/ https://www.zoho.com/en-ca/payroll/help/
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Budgeting and Planning	☒ Yes ☐ No	Zoho Books – Budgeting and Financial Planning Zoho Books provides budgeting and financial planning capabilities that help organizations plan, monitor, and control financial resources effectively. The platform allows users to create department-level or account-level budgets and compare them against actual financial performance throughout the fiscal period. Users can configure budgets based on monthly, quarterly, or annual financial plans, enabling organizations to forecast revenue and control operational expenses. The system provides budget versus actual reports, helping finance teams and department managers track spending patterns and identify variances from planned allocations. Zoho Books also supports financial forecasting and cash flow monitoring, allowing organizations to evaluate expected income and expenses to maintain financial stability. Integration with Zoho Analytics further enhances budgeting and planning by providing advanced dashboards, financial projections, and scenario-based analysis. These capabilities enable organizations to maintain financial discipline, transparency, and informed decision-making across departments and operational programs.	☒ Yes ☐ No	☐ Yes ☒ No	☐ Yes ☒ No	☐ Yes ☒ No	Same as Zoho Books Limitation	N/A	https://www.zoho.com/ca/books/ https://www.zoho.com/ca/books/whats-new.html https://www.zoho.com/blog/books https://help.zoho.com/portal/en/community/zoho-books https://www.zoho.com/ca/books/help/getting-started/welcome.html https://www.zoho.com/books/api/v3/introduction/#organization-id
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Inventory / Asset Management	☒ Yes ☐ No	Zoho Inventory – Inventory and Asset Management Zoho Inventory provides comprehensive capabilities for managing inventory and operational assets within the Zoho ERP ecosystem. The platform enables organizations to track the movement, availability, and lifecycle of inventory items and equipment across warehouses or operational locations. Zoho Inventory supports item tracking, stock level monitoring, and warehouse management, allowing organizations to maintain accurate records of inventory quantities, reorder levels, and item availability. Features such as serial number tracking, batch tracking, and automated stock adjustments help ensure accurate inventory control and traceability. The platform also supports procurement and fulfillment processes, including purchase orders, sales orders, shipment tracking, and supplier management. Inventory transactions integrate with Zoho Books, ensuring that financial records reflect real-time inventory valuation and cost tracking. Zoho Inventory provides reporting and analytics to help organizations monitor inventory utilization, asset availability, and stock movement. These capabilities support better operational planning, cost control, and resource management across departments and locations.	☒ Yes ☐ No	☐ Yes ☒ No	☐ Yes ☒ No	☐ Yes ☒ No	Same as Zoho Books	N/A	https://www.zoho.com/ca/inventory/ https://help.zoho.com/portal/en/community/zoho-inventory/ https://www.zoho.com/blog/inventory https://www.zoho.com/ca/inventory/help/getting-started/sign-up.html https://www.zoho.com/inventory/academy/ https://www.zoho.com/inventory/api/v1/introduction/#overview
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Reporting / Analytics	☒ Yes ☐ No	1. Reporting in Zoho Books Zoho Books provides a comprehensive reporting framework that enables organizations to monitor financial performance, track operational transactions, and support regulatory or internal reporting requirements. The platform includes a wide range of built-in financial reports that help finance teams and administrators gain real-time visibility into financial activities. Zoho Books offers standard accounting reports such as Profit and Loss, Balance Sheet, Trial Balance, Cash Flow Statement, General Ledger, and Accounts Payable and Receivable Aging reports. These reports provide insights into revenue, expenses, financial position, outstanding payments, and overall financial health. The system also supports customizable reporting, allowing users to modify report formats, apply filters, group transactions by department or project, and define reporting periods such as monthly, quarterly, or annually. Reports can be exported in formats such as PDF, Excel, or CSV, making it easier to share financial information with stakeholders or auditors. Zoho Books provides dashboard-based financial summaries that present key metrics visually, helping users quickly understand financial trends and operational performance. For advanced reporting and cross-system analysis, Zoho Books integrates with Zoho Analytics, which allows organizations to create interactive dashboards, perform deeper financial analysis, and combine data from multiple Zoho applications or external systems. 2. Zoho Analytics – Business Intelligence and Reporting Platform Zoho Analytics is a cloud-based business intelligence and analytics platform that enables organizations to transform operational and financial data into actionable insights. It allows users to create interactive dashboards, visual reports, and data-driven analyses across multiple business functions. The platform supports data integration from Zoho applications such as Zoho Books, Zoho Inventory, and Zoho CRM, as well as external systems and databases. Users can build custom reports using drag-and-drop tools, perform cross-functional data analysis, and automate scheduled reporting. Zoho Analytics also supports advanced capabilities such as predictive analytics, AI-driven insights, and secure data sharing to support informed decision-making.	☒ Yes ☐ No	☐ Yes ☒ No	☐ Yes ☒ No	☐ Yes ☒ No	Books limitation are mentioned on previous options. Zoho Analytics: Data is usually refreshed on scheduled intervals rather than continuous real-time updates (https://www.zoho.com/analytics/help/data-sources/sync-schedule.html). Connecting certain third-party systems may require API setup or connectors (https://www.zoho.com/analytics/help/data-sources/) As a cloud platform, access to dashboards and reports typically requires an internet connection.	N/A	https://www.zoho.com/ca/books/help/reports/ https://www.zoho.com/analytics/ https://www.zoho.com/analytics/help/overview.html https://www.zoho.com/analytics/whats-new/release-notes.html https://www.zoho.com/analytics/newsletter/ https://help.zoho.com/portal/community/zoho-analytics/ https://blog.zoho.com/analytics https://www.zoho.com/analytics/api/v2/introduction.html
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Integration and Data Architecture	☒ Yes ☐ No	Zoho ERP – Platform Overview Zoho ERP is a cloud-based enterprise resource planning platform that integrates financial management, procurement, inventory, human resources, analytics, and workflow automation within a unified business application ecosystem. Built on Zoho's secure cloud infrastructure, the platform enables organizations to manage core administrative and operational processes through interconnected applications such as Zoho Books, Zoho Inventory, Zoho Payroll, Zoho Analytics, and Zoho Creator. Zoho ERP provides capabilities for financial accounting, procurement management, inventory tracking, payroll administration, reporting, and workflow automation. The system supports configurable approval workflows, role-based access controls, and audit trails to help organizations maintain financial governance and operational transparency. The platform is designed to support multi-department operations, shared services environments, and scalable business processes. Through built-in APIs and integration tools such as Zoho Flow, Zoho ERP can integrate with third-party systems, payment gateways, and external data platforms. Delivered as a cloud-native SaaS solution, Zoho ERP provides secure remote access, continuous updates, and high availability while allowing organizations to extend functionality using low-code tools.	☒ Yes ☐ No	☐ Yes ☒ No	☐ Yes ☒ No	☐ Yes ☒ No	Same as Zoho Books	N/A	https://www.zoho.com/en-in/erp/ https://www.zoho.com/blog/erp/ https://help.zoho.com/portal/en/community/zoho-erp https://www.zoho.com/en-in/erp/help/
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Platform Tools (workflow, low-code, roles/permissions, extensibility)	☒ Yes ☐ No	Zoho Creator – Low-Code Application Development Platform Zoho Creator is a low-code application development platform that enables organizations to design, build, and deploy custom business applications with minimal coding. It allows users to create data-driven applications using visual development tools, forms, workflows, and reports, helping organizations digitize operational processes quickly. The platform supports application development for use cases such as workflow automation, procurement processes, asset tracking, project management, and service requests. Users can create custom forms, configure approval workflows, generate reports, and integrate applications with other Zoho products such as Zoho Books, Zoho Inventory, and Zoho Analytics. Zoho Creator also supports integrations through APIs and connectors, enabling organizations to connect custom applications with external systems. Delivered as a cloud-based platform, Zoho Creator provides scalable infrastructure, secure access, and mobile-ready applications that can be accessed from web browsers or mobile devices.	☒ Yes ☐ No	☐ Yes ☒ No	☐ Yes ☒ No	☐ Yes ☒ No	Advanced logic or complex workflows may require Deluge scripting or developer expertise Applications handling very large volumes of records may require optimization for better performance Most functionality requires internet access	N/A	https://zoho.com/creator http://zoho.com/creator/product-catalogue.html https://www.zoho.com/creator/release-notes/ https://help.zoho.com/portal/en/community/zoho-creator/filter/announcement https://www.zoho.com/creator/product-roadmap.html
	☒ Yes ☐ No	Zoho Directory – Identity and Access Management Platform Zoho Directory is a cloud-based identity and access management (IAM) solution that enables organizations to centrally manage user identities, authentication, and access control across Zoho applications and integrated third-party services. It provides a secure framework for managing user accounts, roles, and permissions within an organization's IT environment. Zoho Directory supports single sign-on (SSO), multi-factor authentication (MFA), and centralized user provisioning, allowing administrators to control access to applications from a single platform. The system also enables organizations to integrate with external identity providers and enterprise directories using standard protocols such as SAML and OAuth. The platform provides user lifecycle management, allowing administrators to create, modify, and deactivate user accounts efficiently. Detailed audit logs and security policies help organizations monitor user activity and enforce security governance. By centralizing identity management, Zoho Directory helps organizations improve security, access control, and compliance while simplifying administration across multiple applications and systems.	☒ Yes ☐ No	☐ Yes ☒ No	☐ Yes ☒ No	☒ Yes ☐ No	Integrating external applications using SAML or OAuth may require manual configuration (https://www.zoho.com/directory/help/admin-guide/saml.html). It requires internet access for authentication and administration Complex access rules or conditional access policies may require additional setup and administrative configuration (https://www.zoho.com/directory/help/admin-guide/security-policies.html).	N/A	http://zoho.com/directory https://www.zoho.com/directory/whats-new.html https://help.zoho.com/portal/en/community/zoho-directory https://www.zoho.com/blog/directory

Extensibility, integration and interoperability

Integration and Extensibility Overview

Area	Native Integration Features *	Limits or Constraints *	Need for Customization or Middleware *
API	Zoho provides REST-based APIs that allow secure programmatic access and transaction data. Authentication is handled through OAuth 2.0, ensuring secure access for third-party systems. https://www.zoho.com/developer/rest-api.html https://www.zoho.com/books/api/v3/introduction/	API calls are subject to rate limits based on subscription plans.	Some advanced financial operations may require workflow automation or middleware (e.g., Zoho Flow or Zoho Creator) for orchestration.
Events/webhooks	Zoho Supports Webhooks, facilitate communication with third-party applications by sending instant web notifications every time an event occurs. With Webhooks, you can configure HTTP & HTTPS URLs and associate them with workflow rules to automate the notification process https://www.zoho.com/ca/books/help/settings/automation.html#webhooks	Webhooks are configured at the module level and may require custom logic to handle complex workflows.	High-volume transactional systems may require an integration layer (Zoho Flow or message queues) for scalable processing.
Reporting Data Models	Zoho Books provides standard financial reporting models including General Ledger, Accounts Payable, Accounts Receivable, Cash Flow, and Budget reports. https://www.zoho.com/ca/books/accounting-software/accounting-financial-reports/ With Zoho Analytics, organizations can build advanced dashboards, cross-module reports, and multi-entity financial analysis. https://www.zoho.com/analytics	Very large datasets or high-frequency transactional workloads may require data warehousing optimization or incremental data sync strategies to maintain dashboard performance.	Customization can be addressed through Zoho's broader ecosystem including Zoho DataPrep, Zoho Flow, APIs, and integration with external data platforms.
Workflow Engine	Zoho has automation, that allows to create rules that trigger actions automatically. We can set up workflow rules, define conditions for execution, and associate actions such as email alerts, in-app notifications, field updates, webhooks and custom functions. Additionally, you can create schedules for workflow rules and view logs of executed workflows. Workflows support multi-step approval processes, which are commonly required in public sector financial governance and procurement approvals. https://www.zoho.com/ca/books/help/settings/automation.html	Workflow logic supports rule-based automation but not complex orchestration logic.	Involving multiple systems or long-running processes, Zoho Flow, Zoho Creator, or external workflow orchestration tools may be used.

Technical Support

Question	Answer *
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Describe the customer support services available for technical issues, including support channels, hours of availability, response and resolution targets, escalation paths, and any service-level commitments for Canoe Members.	Customer Support Services Zoho provides comprehensive customer support services to ensure the reliable operation of its ERP solutions for CANOE members. These services include multiple support channels, tiered support plans, defined escalation paths, and service-level commitments designed to support enterprise and public-sector environments. 1. Support Channels Customers can access technical assistance through several support channels, including: a. Email support for submitting and tracking technical support requests b. Web-based support portal where customers can submit and manage support tickets c. Live chat support available directly within the Zoho application interface d. Telephone support for troubleshooting and priority issues e. Knowledge base and product documentation including implementation guides and troubleshooting resources f. Community forums moderated by Zoho product teams g. Customer success and account management resources for enterprise customers 2. Hours of Availability: Zoho provides three support tiers—Classic, Premium, and Enterprise—each offering progressively expanded hours of availability and faster response targets. a. Classic Support provides standard support coverage with phone and chat assistance available during business hours (typically 8 hours per day, Monday through Friday). b. Premium Support provides extended coverage with phone and chat support available 24 hours per day, Monday through Friday. c. Enterprise Support provides the highest level of service coverage with 24 hours per day, 7 days per week support availability. 3. Support Plans and Service Levels: a. Classic Support is included with Zoho services and provides access to core support channels including email, portal-based ticketing, and documentation resources. The typical maximum initial response time is 8 hours. b. Premium Support provides enhanced support availability, faster response times, and expanded access to support channels including priority phone and chat assistance. The typical maximum initial response time is 3 hours. Premium Support is available as an optional support plan typically priced at approximately 20% of the applicable subscription license fees. c. Enterprise Support is designed for mission-critical environments and includes accelerated response targets, expanded support availability, and access to a Technical Account Manager (TAM) who provides proactive guidance, best practices, and platform optimization support. The typical maximum initial response time is 1 hour. Enterprise Support is available as an optional support plan typically priced at approximately 25% of the applicable subscription license fees. Additional details regarding Zoho's Enterprise Support offering are available at: https://www.zoho.com/enterprise/enterprise-support.html 4. Response and Resolution Targets Zoho's support framework includes defined response targets based on issue severity and the selected support plan. Typical maximum initial response targets are 8 hours for Classic Support, 3 hours for Premium Support, and 1 hour for Enterprise Support. Critical incidents affecting service availability are prioritized through accelerated response and escalation procedures. Resolution timelines vary depending on the complexity and nature of the issue, with higher-severity issues escalated through technical and management channels as required. 5. Escalation Process Zoho maintains a structured escalation model to ensure efficient issue resolution. a. Tier 1 – Customer Support Team handles initial ticket intake, troubleshooting, and triage. b. Tier 2 – Product Specialists and Technical Engineers provide advanced troubleshooting, configuration review, and integration support. c. Tier 3 – Product Engineering investigates product defects, platform performance issues, or architectural concerns. d. Management Escalation – Critical or unresolved incidents may be escalated to support management and customer success leadership. 6. Implementation Hypercare Support For implementations delivered through Zoho's Enterprise Business Solutions (EBS) team or certified Zoho partners, a hypercare support period is typically provided following system go-live. During this transition phase, implementation specialists and support engineers closely monitor system performance, assist users with operational questions, and rapidly address configuration or integration issues that may arise as the system enters production use. Hypercare support helps ensure a smooth transition from implementation to steady-state operations and provides additional assistance while internal teams adapt to the new ERP environment. 7. Service-Level Commitments Zoho ERP operates on a high-availability SaaS infrastructure hosted in enterprise-grade data centers with continuous monitoring of application services and system health. Service reliability is supported through: a. Continuous infrastructure monitoring and operational oversight b. Scheduled maintenance windows communicated in advance when required c. Security and compliance monitoring aligned with standards such as ISO 27001 and SOC 2 d. Public transparency through Zoho's system status dashboard In addition to technical support, Zoho provides onboarding resources, training materials, and product documentation to help CANOE members successfully deploy and operate the platform. Through this multi-channel support model, tiered service plans, structured escalation framework, and implementation hypercare support, Zoho ensures that customers receive reliable assistance, operational continuity, and scalable support aligned with their operational needs.
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Describe your technical support model, including the distinction between vendor-provided support and partner-provided support. Identify which types of issues are handled directly by your company.	Technical Support Model Zoho operates a vendor-managed technical support model, where the core platform support services for the ERP environment are delivered directly by Zoho's internal support organization and product engineering teams. This approach ensures consistent service quality, direct access to product specialists, and efficient resolution of technical issues related to the Zoho platform. Vendor-Provided Support (Zoho) Zoho provides technical support for all core ERP platform components, including applications such as Zoho Books, Zoho Inventory, Zoho Payroll, Zoho Analytics, Zoho Creator, Zoho Flow, and related Zoho platform services. Issues handled directly by Zoho include: Platform availability and service incidents - Product functionality troubleshooting and defect resolution - System configuration guidance and product usage assistance - API and integration troubleshooting involving Zoho services - Security, authentication, and user access control issues - Performance monitoring and system reliability investigations - Clarification of product functionality, feature behavior, and documentation support - Product updates, patches, and platform maintenance These services are delivered through Zoho's global customer support organization, with escalation to product specialists and engineering teams when deeper investigation or product-level remediation is required. 2. Partner-Provided Support (Implementation and Consulting Services) Zoho may collaborate with certified Zoho implementation partners who provide implementation and consulting services. Partner involvement typically focuses on deployment, customization, and organizational adoption rather than core platform support. Partner services may include: - Implementation planning and system configuration - Custom application development or integrations - Business process design and optimization - User training and change management - Ongoing configuration support for customer-specific extensions Where partners are involved, they may provide first-line assistance related to custom configurations, integrations, or implementation-specific components. 3. Support Responsibility Model In all cases, Zoho remains responsible for core platform support, including system stability, product functionality, and platform-level issue resolution. Partners provide supplementary services related to implementation, configuration, or customer-specific extensions. Customers are not required to route support requests through an implementation partner. CANOE members may contact Zoho directly for any platform-related support issue. 4. Support Model for CANOE Members For CANOE Procurement Group members, Zoho will serve as the primary provider of technical support for the ERP platform. Members will have direct access to Zoho's support organization for product-related issues, ensuring consistent service delivery and direct engagement with the product vendor. Where certified partners participate in implementation or customization, they may provide supplementary support for configuration or project-specific components, while Zoho continues to manage and resolve core platform, infrastructure, and product-related technical issues.
Describe how support responsibilities are divided between your company and implementation partners, including issue triage, root-cause analysis, and platform-level defects	Division of Support Responsibilities Between Zoho and Implementation Partners Zoho operates a vendor-led support model in which Zoho provides primary technical support for the ERP platform, while certified implementation partners may assist with deployment, configuration, and operational optimization. This model ensures that platform-level issues are handled directly by the product vendor while allowing partners to support implementation-specific requirements. 1. Zoho Responsibilities Zoho is responsible for support of the core ERP platform and all underlying SaaS services. Zoho responsibilities include: - Issue triage and initial technical troubleshooting when incidents are reported through Zoho's support channels. - Root-cause analysis for product-level issues, including platform performance concerns, system errors, and unexpected product behavior. - Investigation and resolution of platform defects, including bug fixes and software patches delivered by Zoho's product engineering teams. - API functionality and integration framework support related to Zoho services and supported connectors. - Security, authentication, and access management issues related to the Zoho platform. - Infrastructure monitoring and platform reliability management, including system availability and service health. - Product updates, maintenance releases, and platform improvements delivered through Zoho's SaaS release process. - When deeper technical investigation is required, issues are escalated internally from Zoho's support teams to specialized product engineering teams responsible for code-level remediation. 2. Implementation Partner Responsibilities (Optional) Certified Zoho implementation partners may support organizations during deployment and operational adoption of the system. Partner responsibilities typically focus on implementation-specific activities rather than platform-level support. Partner services may include: - System implementation planning and configuration based on organizational requirements - Customization of workflows, forms, and automation using Zoho platform tools such as Zoho Creator and workflow automation capabilities - Development of integrations with external systems where custom connectors or middleware are required - User onboarding, training, and change management support - Initial triage of issues related to configuration, customizations, or implementation-specific processes Where partners provide first-line assistance, issues determined to be related to the underlying Zoho platform are escalated directly to Zoho's support organization for further investigation and resolution. 3. Coordinated Support Model Zoho and its implementation partners operate within a coordinated support framework to ensure timely issue resolution. - Configuration, customization, or implementation-related issues are typically handled by the implementation partner. - Platform functionality issues, service incidents, or software defects are handled directly by Zoho. - Complex issues involving both configuration and platform behavior are jointly reviewed to determine root cause and the appropriate resolution path. - Customers maintain direct access to Zoho's support organization for platform-related issues regardless of partner involvement. This collaborative support model ensures that CANOE members receive timely assistance for operational issues while maintaining direct access to Zoho's product engineering expertise for platform-level matters.

Describe how technical support interacts with your update and release process, including communication of upcoming releases, support for regression issues, and schedule stability	Interaction Between Technical Support and the Update and Release Process Zoho operates a continuous SaaS update and release management process designed to deliver new functionality, security updates, and performance improvements while maintaining platform stability. Zoho's technical support, product management, and engineering teams operate within an integrated release management framework to ensure that updates are communicated effectively, deployed safely, and supported throughout the lifecycle of each release. 1. Release Communication Zoho communicates upcoming releases and product updates through multiple channels to ensure transparency and operational preparedness for customers and administrators. These include: a. Official release notes and product update documentation published through Zoho's help portals and documentation sites b. In-product notifications highlighting new features, enhancements, or interface changes c. Email communications, product blogs, and knowledge base updates describing significant enhancements or operational considerations d. Advance notifications for scheduled maintenance activities or infrastructure updates where applicable These communications ensure that administrators and users are aware of upcoming changes and can plan accordingly. 2. Support for Regression Issues Zoho's technical support organization plays a central role in monitoring and addressing issues that may arise following product updates. If a customer reports unexpected behavior after a release, the following process is followed: a. Zoho's support team performs initial troubleshooting and incident triage. b. If the issue is suspected to be related to a recent update, the case is escalated to product specialists and engineering teams. c. Engineering teams conduct root-cause analysis and regression validation to determine whether the issue is related to a release change. d. Where required, Zoho deploys corrective measures such as patches, hotfixes, or configuration adjustments through the SaaS update process. This coordinated process enables rapid mitigation of potential regression issues while maintaining system continuity. 3. Schedule Stability and Release Management Zoho follows controlled deployment practices designed to maintain system reliability and predictable operations for customers. Key elements of this approach include: a. Managed SaaS release cycles that deliver updates incrementally without requiring customer-led upgrade projects b. Extensive pre-release testing and validation processes to ensure platform stability and backward compatibility c. Monitoring of platform performance following releases to detect and address potential issues early d. Advance communication of maintenance windows when service interruptions may be required e. Zoho also maintains internal change management and release governance processes to review, approve, and validate updates prior to deployment. These processes help ensure that platform changes are introduced in a controlled and predictable manner, minimizing operational disruption for customers. Through the close coordination of technical support, product engineering, and release management teams, Zoho ensures that customers receive ongoing platform improvements while maintaining a stable and reliable operating environment.
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Suitability and Member profile

Question	Reponse *
Beyond the financial cost, what is the specific Full-Time Equivalent (FTE) commitment required from the client's internal team during a standard implementation to ensure success, and what specific technical skill sets must those internal staff possess	Client FTE Commitment and Required Internal Skills Zoho's ERP implementation methodology is designed to minimize the operational burden on client organizations while ensuring that appropriate internal participation is available to support successful deployment, configuration, and user adoption. Most technical implementation activities are delivered by Zoho's implementation teams or certified Zoho partners, while client participation focuses primarily on business validation, governance, and testing. Estimated Client FTE Commitment For a typical ERP implementation, client organizations are generally expected to allocate approximately 0.25 to 0.5 Full-Time Equivalent (FTE) during the active implementation period. This commitment may vary depending on the size of the organization, the number of modules implemented, and the complexity of integrations or data migration activities. Client participation is typically distributed across several internal roles rather than a single dedicated resource. These roles usually participate on a part-time basis during key implementation phases such as requirements validation, configuration review, testing, and go-live preparation. Typical client roles include: Project Sponsor / Executive Lead Provides project governance, strategic oversight, and decision-making support. Participation is generally limited to milestone reviews and executive approvals. Business Process Owner / Functional Lead Represents operational departments such as finance, procurement, or HR. This role participates in requirements validation, workflow design reviews, and user acceptance testing. IT / System Administrator Supports user provisioning, security configuration, integration coordination, and data migration validation where required. Required Internal Skill Sets Zoho's cloud-based SaaS architecture significantly reduces the need for deep technical expertise within the client organization. However, certain internal competencies help ensure a smooth implementation and effective long-term system governance. Recommended internal capabilities include: Knowledge of the organization's financial, procurement, HR, or operational processes relevant to the ERP modules being implemented Basic system administration skills, including user access management and configuration oversight Data validation capabilities, particularly for migrated financial or operational records Familiarity with the organization's approval workflows and governance policies General familiarity with cloud-based enterprise software environments Specialized programming, infrastructure management, or database administration skills are not required, as Zoho provides a fully managed SaaS platform. Implementation Collaboration Model Zoho's implementation teams or certified partners lead platform configuration, system setup, integration development, and technical deployment activities. The client team focuses primarily on validating business processes, reviewing system configurations, participating in testing activities, and supporting organizational adoption. As part of the implementation process, Zoho provides knowledge transfer and training activities to ensure that client administrators and operational teams are equipped to manage day-to-day system operations, configuration updates, and reporting activities following go-live. Post-Implementation Governance Following deployment, organizations typically maintain light operational oversight of the ERP platform through designated system administrators or application owners. These individuals manage user access, oversee configuration updates, review system usage, and coordinate with Zoho support for any platform-related issues. Because the solution is delivered as a managed SaaS platform, ongoing operational effort remains minimal while still allowing the organization to maintain appropriate governance and control over the system. This collaborative implementation and governance model enables organizations to successfully deploy the ERP platform while minimizing internal resource requirements and building internal capability for long-term system stewardship.

Describe a specific client profile (size, complexity, or industry vertical) where your solution is NOT the best fit, and explain why a competing product might serve that specific profile better.	Client Profiles Where Zoho ERP May Not Be the Best Fit Zoho ERP is designed to provide a modern, cloud-native enterprise platform that emphasizes usability, flexibility, rapid deployment, and lower total cost of ownership. While the platform supports a wide range of public-sector and commercial organizations, there are certain specialized environments where other ERP solutions may be more appropriate. Highly Customized Legacy ERP Environments Organizations that have operated heavily customized on-premise ERP systems for many years—particularly where thousands of customizations, proprietary integrations, or highly modified database structures are embedded into core business processes—may find migration to a modern SaaS platform challenging. In such cases, organizations may prefer to maintain or extend their existing legacy ERP environment rather than re-engineer those processes. Industries Requiring Deep Vertical ERP Modules Certain industries rely on highly specialized ERP capabilities that extend beyond the scope of general-purpose ERP platforms. Examples include: Advanced manufacturing environments requiring complex material requirements planning (MRP) and production scheduling systems Global supply chain orchestration with highly specialized logistics management capabilities Industry-specific regulatory reporting frameworks embedded directly within the ERP system Organizations operating in these environments sometimes select ERP platforms that include deeply embedded vertical modules tailored specifically to those industries. Very Large Global Enterprises with Highly Complex ERP Footprints Large multinational enterprises with highly complex operational environments, extensive global compliance requirements, and deeply integrated enterprise software stacks may choose traditional Tier-1 ERP platforms such as SAP or Oracle that provide highly specialized modules and long-established ecosystems for large-scale global deployments. Where Zoho ERP Is Optimized Zoho ERP is particularly well suited for organizations seeking: A modern cloud-based ERP platform with integrated financial, operational, and reporting capabilities Lower implementation complexity and faster deployment timelines Reduced infrastructure and maintenance overhead through a fully managed SaaS architecture Flexible integration with modern cloud applications and digital platforms A cost-effective solution that can scale with organizational growth For public-sector organizations—including municipal governments, provincial and federal agencies, Crown corporations, and other public institutions—as well as mid-sized enterprises, Zoho often provides a highly effective balance of capability, agility, and affordability compared to traditional enterprise ERP systems.
Describe a specific client profile (size, complexity, or industry vertical) where your solution is the best fit, and explain why a competing product might serve that specific profile better.	Client Profiles Where Zoho ERP Is the Best Fit Zoho ERP is particularly well suited for public-sector organizations and mid-sized enterprises seeking a modern, cloud-based ERP platform that is cost-effective, easy to deploy, and capable of supporting integrated administrative operations. A typical organization where Zoho ERP performs exceptionally well has the following characteristics: Public-sector entities, including municipal governments, provincial or federal agencies, Crown corporations, and public institutions Mid-sized organizations or departments requiring integrated financial management, procurement, payroll, inventory or asset management, reporting, and workflow automation Organizations seeking a cloud-native SaaS platform that minimizes infrastructure management and reduces reliance on internal IT resources Teams looking for rapid implementation timelines and lower total cost of ownership compared to traditional ERP systems Environments where business users, rather than large technical teams, manage configuration and ongoing administration These organizations typically benefit from Zoho's unified platform architecture, which combines financial management, operational workflows, analytics, and integrations within a single cloud ecosystem. The platform's configuration tools and low-code capabilities allow organizations to adapt workflows and reporting without requiring extensive software development or specialized ERP expertise. Situations Where Other ERP Platforms May Be Preferred Organizations with extremely complex, highly specialized ERP environments—such as very large global enterprises with extensive industry-specific modules, deeply customized legacy ERP deployments, or highly specialized manufacturing or supply-chain management requirements—may choose traditional Tier-1 ERP platforms such as SAP or Oracle. These systems often include deeply embedded vertical modules designed for those specialized operational environments. For most public-sector organizations, government agencies, and mid-sized enterprises, however, Zoho ERP provides a strong balance of capability, agility, and cost efficiency, enabling organizations to modernize administrative systems without the complexity and overhead typically associated with traditional enterprise ERP platforms.

Identify functional gaps that your past public-sector clients (within the last three years) have raised during implementation.	Functional Gaps Identified During Recent Public-Sector Implementations During recent implementations with public-sector organizations, Zoho has received feedback regarding certain functional areas that may require configuration, extensions, or integrations to fully align with specific government operational frameworks. These situations generally arise where public-sector administrative models differ from standard commercial ERP practices. In most cases, these requirements have been addressed through Zoho's configurable architecture, workflow automation capabilities, or extensions built within the Zoho platform. Public-Sector Budgeting and Fund Accounting Some public-sector organizations require formal fund accounting structures, multi-year budgeting cycles, and grant-based financial tracking models that differ from traditional commercial accounting frameworks. Mitigation: Zoho addresses these needs through configurable account structures, tagging frameworks, and custom reporting models. Organizations often use Zoho Analytics and configurable financial structures within Zoho Books to support fund-level reporting, budget tracking, and multi-year financial oversight. Complex Government Procurement Workflows Public-sector procurement processes frequently involve multi-stage approvals, tender management processes, compliance documentation, and strict authorization controls. Mitigation: Zoho supports these requirements through configurable approval hierarchies, workflow automation, and integration with procurement management tools. In some cases, organizations implement extended procurement workflows using Zoho Creator or integrate with existing procurement platforms. Public Infrastructure Asset Management Municipal and government organizations may require advanced infrastructure asset management capabilities, particularly for managing long-lived public assets such as transportation infrastructure, utilities, or facilities. Mitigation: Zoho provides asset tracking capabilities through Zoho Inventory and custom applications built on Zoho Creator. For organizations with highly specialized infrastructure asset requirements, Zoho ERP can integrate with dedicated asset management platforms while maintaining financial and operational records within the ERP system. Government-Specific Reporting Requirements Some public-sector organizations require specialized statutory reporting formats or compliance reports that differ from standard financial reporting templates. Mitigation: Zoho provides flexible reporting capabilities through Zoho Analytics, allowing organizations to build customized dashboards, financial reports, and operational reporting structures aligned with regulatory or oversight requirements. Legacy System Data Migration Complexity During several implementations, organizations migrating from legacy financial systems identified challenges related to data cleansing, historical data normalization, and mapping legacy structures to modern cloud-based ERP models. Mitigation: Zoho implementation teams address these challenges through structured migration methodologies that include data validation, staged migration processes, and reconciliation cycles to ensure data integrity during the transition. Continuous Product Improvement Zoho maintains an active product development and enhancement cycle. Feedback from public-sector implementations is regularly incorporated into product improvements and platform capabilities. In addition, Zoho's low-code extensibility and open API architecture allow organizations to address specialized requirements through configuration, extensions, or integrations without extensive custom software development. Alignment with Public-Sector Digital Modernization Many public-sector organizations are transitioning away from legacy on-premise ERP systems toward cloud-based, modular platforms that support digital service delivery, integrated analytics, and streamlined administrative processes. Zoho's platform architecture supports this modernization approach by enabling agencies to adopt cloud-based ERP capabilities while maintaining flexibility to integrate with specialized systems where required.
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Describe compatibility with commonly used public-sector systems (procurement portals, AP automation tools, asset systems, financial reporting tools).	Compatibility with Common Public-Sector Systems Zoho ERP solutions are designed with an open, API-first integration architecture that enables compatibility with commonly used public-sector systems, including procurement portals, accounts payable automation tools, asset management platforms, identity management systems, and financial reporting tools. Integration is supported through REST APIs, webhooks, secure authentication protocols, middleware connectors, and standard data exchange mechanisms, allowing organizations to connect Zoho ERP with existing enterprise applications while maintaining operational continuity. Procurement Portals Zoho ERP platforms can integrate with external procurement and tendering systems commonly used by public-sector organizations, including electronic procurement portals and vendor management platforms. Integration capabilities include: API-based synchronization of supplier records, purchase orders, and contract information Automated import of procurement and vendor data from external procurement portals Workflow automation for approval processes, purchase requisitions, and purchase order creation Integration with procurement systems used by municipalities, provincial agencies, and cooperative purchasing networks These integrations allow organizations to maintain procurement workflows in external tendering systems while managing financial commitments and vendor payments within Zoho ERP. Accounts Payable (AP) Automation Tools Zoho ERP supports integration with accounts payable automation solutions used for invoice capture, document processing, and automated invoice workflows. Capabilities include: Integration with OCR-based invoice capture systems and document management tools Automated synchronization of vendor invoices, payment status, and financial records Support for electronic invoice approval workflows and audit tracking API-based connectivity with third-party AP automation platforms These integrations allow organizations to streamline invoice processing while maintaining accurate financial records within the ERP system. Asset Management Systems Public-sector organizations frequently rely on specialized asset management platforms for managing infrastructure, facilities, and equipment. Zoho ERP can integrate with these systems to support coordinated financial and operational asset management. Integration capabilities include: Synchronization of asset records between asset management platforms and financial systems Financial asset tracking, depreciation management, and capital asset accounting Integration with infrastructure asset systems used for facilities, utilities, or transportation assets Extension of asset management workflows through configurable applications built on Zoho Creator GIS and Spatial Systems Integration Public-sector organizations frequently use Geographic Information Systems (GIS) to manage infrastructure assets, service locations, and spatial data related to public services. Zoho ERP can integrate with GIS platforms such as ESRI ArcGIS and other spatial data systems through APIs and data synchronization frameworks. This enables organizations to link financial records, asset data, and service activities with geographic information, supporting use cases such as infrastructure asset tracking, service request management, and location-based reporting. Integration between ERP and GIS systems helps ensure that operational, financial, and spatial data remain synchronized across systems used by government departments. Identity and Access Management Systems Zoho ERP supports integration with enterprise identity and access management platforms commonly used within public-sector IT environments. The platform supports Single Sign-On (SSO) and federated authentication through standards such as SAML and OAuth, enabling integration with identity providers including Microsoft Active Directory, Azure Active Directory, and other enterprise identity management systems. These integrations allow organizations to enforce centralized authentication policies, role-based access controls, and multi-factor authentication while maintaining consistent identity governance across enterprise systems. Financial Reporting and Business Intelligence Platforms Zoho ERP integrates with reporting and analytics platforms commonly used in public-sector environments. Key capabilities include: Native integration with Zoho Analytics for advanced dashboards, financial reporting, and operational analysis Data export and API connectivity with external business intelligence platforms such as Microsoft Power BI, Tableau, or other reporting environments Support for consolidated reporting across financial, operational, and administrative data sources Scheduled data synchronization and secure data exchange for regulatory and oversight reporting Integration Framework Zoho's integration framework supports interoperability with both modern cloud platforms and legacy systems through multiple integration methods, including: REST-based APIs and secure authentication protocols (OAuth, token-based access) Event-driven integrations using webhooks Integration orchestration through middleware platforms such as Zoho Flow Secure file transfer and batch data exchange where required Support for integration with third-party platforms through connectors and custom integrations This flexible integration architecture allows public-sector organizations to adopt Zoho ERP while maintaining compatibility with existing procurement systems, financial reporting platforms, GIS systems, identity management infrastructure, and operational applications already in use.
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Identify typical integration points where members often require customization.	Typical Integration Points Requiring Customization While Zoho ERP provides standard APIs and integration frameworks that support connectivity with external systems, public-sector organizations often require configuration or customization at key integration points to align with existing enterprise systems, operational processes, and regulatory requirements. Common integration areas include: Procurement and Tendering Systems Public-sector organizations frequently use external procurement portals or tender management systems for vendor registration, bid management, and contract awards. Typical customization areas include: Synchronization of vendor records and procurement data between the procurement portal and ERP system Integration of purchase orders, contract information, and supplier onboarding records Workflow alignment between procurement approval processes and ERP financial controls Automated exchange of procurement outcomes and contract award data
	Accounts Payable Automation and Invoice Processing Organizations often deploy document capture or OCR-based invoice processing solutions to automate invoice intake and validation within accounts payable processes. Typical customization areas include: Mapping of invoice data fields between OCR capture systems and ERP financial records Automated invoice validation and approval workflows aligned with internal financial controls Integration with electronic payment processing systems and vendor payment workflows Synchronization of invoice status, payment confirmations, and audit records between systems
	Financial Reporting and Business Intelligence Systems Public-sector organizations often use dedicated reporting platforms or enterprise data warehouses to support regulatory reporting, operational analysis, and executive dashboards. Typical integration requirements include: Synchronization of financial and operational data from ERP systems for reporting and analytics Creation of custom data models to support public-sector financial reporting structures and oversight requirements Integration with external business intelligence platforms such as Power BI, Tableau, or enterprise analytics environments Banking, Treasury, and Electronic Payment Systems Public-sector organizations often integrate ERP systems with banking platforms and treasury systems to support electronic payments, vendor disbursements, and financial reconciliation. Typical customization areas include: Integration with banking platforms for electronic funds transfer (EFT), ACH, or wire payments Automated export of payment batches and reconciliation of payment confirmations Synchronization of bank transaction data for financial reconciliation and audit purposes Integration with treasury management systems or government banking interfaces where required
	Geographic Information Systems (GIS) Public-sector organizations frequently use Geographic Information Systems (GIS) to manage infrastructure assets and service locations. Typical customization areas include: Integration of location-based asset data with ERP financial and operational records Linking service activities or maintenance records with geographic asset data Supporting spatial analysis and reporting across operational and financial systems Identity and Access Management Systems Many government IT environments rely on centralized identity systems such as Microsoft Active Directory or Azure Active Directory. Typical customization areas include: Configuration of Single Sign-On (SSO) using SAML or OAuth authentication protocols Synchronization of role-based access controls between identity systems and ERP permissions Integration with enterprise multi-factor authentication and identity governance policies Legacy System Data Migration During ERP modernization initiatives, organizations frequently need to migrate historical data from legacy financial or operational systems into the new ERP platform. Typical customization areas include: Data transformation and mapping between legacy system structures and ERP data models Validation and reconciliation of historical financial records to ensure accuracy Migration of vendor records, asset inventories, and transaction histories into the new system Zoho's open integration architecture—including REST APIs, webhooks, middleware connectors such as Zoho Flow, and low-code extension capabilities—enables organizations to implement these integrations while maintaining platform stability and long-term maintainability.

Comparative Positioning

Proponents must summarize how their ERP differs from other major products in the market. This section aims to help Canoe Members understand when your solution is a good fit and when it is not.

Dimension	Strengths of your Solution *	Limitations of your solution *	Typical competitor approaches *	Members types best served *
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Finance	Strengths of Zoho ERP Financial Management Cloud-native financial management platform that enables rapid deployment without requiring on-premise infrastructure or complex system setup. Integrated platform architecture, connecting financial management with applications such as Zoho Inventory, Zoho Analytics, Zoho CRM, and Zoho Payroll. Built-in workflow automation including approval workflows, recurring transactions, automated notifications, and payment reminders. Open integration architecture using REST APIs and webhooks for connectivity with procurement portals, payment systems, reporting tools, and other enterprise applications. Multi-entity and multi-currency support, enabling organizations to manage financial operations across departments, agencies, or regional entities. Real-time financial dashboards and reporting, with advanced analytics capabilities available through Zoho Analytics. Secure cloud environment with role-based access control, audit logging, encryption, and enterprise-grade security practices. Web and mobile accessibility, allowing financial administrators and approvers to manage transactions, approvals, and reporting from multiple devices.	Limitations of Zoho ERP Financial Management Some advanced public-sector fund accounting models may require configuration, reporting customization, or extension through Zoho Analytics or Zoho Creator. Highly specialized multinational tax compliance frameworks or industry-specific accounting modules may require configuration, regional integrations, or integration with external financial systems.	Typical Competitor Approaches Large enterprise ERP platforms such as SAP, Oracle, and Microsoft Dynamics provide deeply specialized financial modules designed for highly complex enterprise environments. These platforms typically involve longer implementation timelines, extensive customization, and larger consulting engagements. Licensing, infrastructure, and implementation costs are generally higher due to the complexity and scale of these enterprise deployments.	Member Types Best Served Zoho ERP financial management capabilities are particularly well suited for: Municipal governments, provincial or federal agencies, Crown corporations, and public institutions seeking modern cloud-based financial management systems. Public-sector organizations requiring integrated accounting, procurement tracking, financial reporting, and operational visibility. Organizations seeking cost-effective ERP platforms with faster implementation timelines and lower total cost of ownership. Teams that prefer SaaS-based platforms with minimal infrastructure management and simplified system administration. Departments looking to automate financial workflows, approvals, and reporting processes without extensive customization or large IT teams.
Procurement	Strengths of Zoho ERP Procurement Capabilities Cloud-based procurement management supporting end-to-end purchasing processes including requisitions, purchase orders, vendor management, and approval workflows. Native integration with Zoho financial systems such as Zoho Books and Zoho Inventory, ensuring synchronized purchasing records and financial transactions. Configurable approval workflows that support multi-level purchase approvals and procurement governance requirements. Centralized vendor and supplier management, enabling organizations to maintain vendor profiles, track purchase history, and manage supplier communications. Automation features supporting purchase requests, purchase order generation, notifications, and approval routing. Open integration architecture using APIs and webhooks to connect with external procurement portals, supplier systems, and financial platforms. Real-time procurement analytics through Zoho Analytics, enabling spend analysis, procurement tracking, and vendor performance monitoring. Web and mobile accessibility, allowing users to review and approve procurement requests from multiple devices.	Limitations of Zoho ERP Procurement Capabilities Highly complex procurement compliance frameworks in large government organizations may require additional configuration, customization, or integration with specialized vendor management platforms. Certain government-specific procurement reporting formats or tender management requirements may require custom reporting or extensions using Zoho Analytics or Zoho Creator.	Typical Competitor Approaches Enterprise procurement platforms such as SAP Ariba, Oracle Procurement Cloud, and Coupa provide deeply specialized procurement modules designed for large global enterprises. These systems typically require significant configuration, specialized consulting expertise, and longer implementation timelines. Licensing, infrastructure, and implementation costs are often higher due to the scale and complexity of enterprise procurement environments.	Member Types Best Served Zoho ERP procurement capabilities are particularly well suited for: Municipal governments, provincial and federal agencies, Crown corporations, and public-sector organizations requiring streamlined procurement workflows and purchasing oversight. Public agencies seeking integrated procurement and financial management systems within a unified cloud platform. Organizations looking to automate purchase requests, approvals, and vendor tracking processes. Departments seeking improved procurement transparency, spending visibility, and approval governance. Organizations preferring cloud-based procurement tools that integrate easily with financial and operational systems while minimizing implementation complexity.

Reporting	Strengths of Zoho ERP Reporting Capabilities Native financial reporting within Zoho Books, including Profit and Loss statements, Balance Sheets, Cash Flow reports, Accounts Receivable and Accounts Payable reports, and tax reporting. Real-time financial visibility, allowing finance teams to monitor transactions, budgets, and operational performance directly within the accounting system. Advanced analytics capabilities through Zoho Analytics, enabling interactive dashboards, cross-module reporting, and multi-source data consolidation. Seamless integration between Zoho Books and Zoho Analytics, allowing organizations to extend standard accounting reports into comprehensive financial and operational dashboards. Flexible reporting and data modeling tools, including calculated fields, custom visualizations, and configurable reporting structures. Automated data synchronization, ensuring that financial and operational data from Zoho Books and other connected applications remain current for reporting and analysis. Secure access control and role-based permissions, allowing organizations to manage visibility of financial data across departments and leadership roles. Web and mobile access, enabling stakeholders to review financial performance and operational dashboards from multiple devices.	Limitations of Zoho ERP Reporting Capabilities Native reporting within Zoho Books is primarily focused on standard accounting and operational financial reports, and advanced analytics scenarios typically leverage Zoho Analytics. Certain specialized public-sector reporting formats or compliance reports may require configuration or customization within Zoho Analytics. Very large enterprise datasets may require optimized data modeling and refresh strategies within Zoho Analytics. Highly advanced statistical or predictive modeling scenarios may require integration with specialized data science or analytics tools.	Typical Competitor Approaches Dedicated enterprise BI platforms such as Microsoft Power BI, Tableau, or SAP Analytics Cloud provide highly specialized data visualization and enterprise analytics capabilities. These platforms often require separate data infrastructure, data engineering resources, and ongoing management of reporting pipelines. Implementation complexity and licensing costs may be higher due to enterprise-scale reporting architectures.	Member Types Best Served Zoho ERP reporting capabilities are particularly well suited for: Municipal governments, provincial or federal agencies, Crown corporations, and public-sector organizations requiring financial reporting, operational dashboards, and consolidated analytics. Public agencies seeking integrated accounting and analytics capabilities within a unified cloud platform. Departments requiring real-time financial visibility and automated reporting processes. Organizations seeking cost-effective business intelligence tools that integrate directly with financial and operational systems. Teams that require accessible reporting platforms supporting both operational analysis and executive-level decision-making.
Extensibility	Strengths of Zoho ERP Platform Extensibility Highly extensible cloud platform that enables organizations to expand ERP functionality using tools such as Zoho Creator, Zoho Flow, and REST APIs. Open integration architecture with REST APIs and webhooks supporting connectivity with procurement portals, payment systems, reporting platforms, GIS systems, and legacy applications. Low-code development capabilities through Zoho Creator, allowing organizations to build custom modules, workflows, and applications without extensive programming expertise. Built-in workflow automation and scripting capabilities, supporting customization of approvals, notifications, and operational automation processes. Unified application ecosystem, enabling integration across Zoho applications including finance, CRM, HR, analytics, project management, and collaboration tools. Flexible configuration options, including custom fields, forms, modules, and data structures to adapt the system to specific organizational processes. Integration orchestration tools such as Zoho Flow, enabling automation and connectivity between Zoho applications and external third-party services. Secure authentication and access management, ensuring safe integration with external systems while maintaining enterprise security controls.	Limitations of Zoho ERP Platform Extensibility Extremely complex enterprise customizations may require additional development using Zoho Creator or external development frameworks. Certain highly specialized industry solutions may require integration with third-party applications rather than native platform modules. Advanced integration scenarios involving very high transaction volumes may require optimized API design or additional middleware architecture.	Typical Competitor Approaches Enterprise ERP vendors often rely on proprietary development environments and customization frameworks to extend platform functionality. These platforms typically require specialized developers or certified consultants to build custom modules or integrations. Customizations in traditional ERP systems often involve longer development cycles, complex change management, and higher implementation costs.	Member Types Best Served Zoho ERP extensibility capabilities are particularly well suited for: Municipal governments, provincial or federal agencies, Crown corporations, and public-sector organizations requiring ERP systems that can adapt to evolving operational requirements. Organizations seeking configurable platforms that minimize heavy custom development or infrastructure dependencies. Teams looking to build custom workflows, automation processes, or operational extensions using low-code tools. Departments requiring integration across multiple operational systems such as finance, procurement, asset management, and reporting platforms. Organizations seeking a cloud platform that supports gradual expansion and customization as operational needs evolve.

Experience

Describe your experience.

Line Item	Question	Response *
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1	Provide a high level description of the services you are offering in your proposal.	Experience – High-Level Description of Proposed Services Zoho proposes a secure, cloud-based Enterprise Resource Planning (ERP) platform designed to support the administrative, financial, and operational needs of public-sector organizations across Canada. Founded in 1996, Zoho has more than 25 years of experience developing enterprise software platforms used by over 100 million users globally, delivering a mature and continuously evolving cloud application ecosystem. The proposed solution provides a unified Software-as-a-Service (SaaS) environment that integrates core ERP capabilities including financial management, procurement and contract management, human resources and payroll, budgeting and forecasting, asset management, workflow automation, and advanced analytics within a single connected platform. The platform enables municipalities, provincial and federal agencies, Crown corporations, academic institutions, and other public-sector entities to modernize administrative operations through a centralized system of record that improves transparency, operational efficiency, and data-driven decision-making. Key capabilities include configurable approval workflows, role-based security, comprehensive audit trails, automated financial and procurement processes, and integrated reporting tools that support both operational oversight and regulatory reporting requirements. Zoho's ERP ecosystem supports both integrated ERP suite deployments and best-of-breed architectures, allowing organizations to adopt a comprehensive ERP platform or integrate specialized third-party systems through well-documented APIs and connectors. This flexible architecture allows CANOE members to modernize their technology environments while preserving existing investments in complementary systems such as procurement portals, asset management platforms, or business intelligence tools. Beyond the software platform, Zoho provides supporting services including onboarding guidance, configuration assistance, integration support, documentation, training resources, and ongoing product updates delivered through Zoho's managed SaaS environment. These services enable public-sector organizations to deploy scalable ERP capabilities across departments including finance, procurement, human resources, asset management, and operations. Through this integrated ERP approach, Zoho helps public-sector organizations strengthen financial governance, improve operational transparency, enhance cross-department collaboration, and deliver more efficient services to citizens and stakeholders.
2	What is your Canadian public sector market share for the solutions you are proposing?	Examples of Canadian Public Sector Customers Using the Proposed Solution Zoho solutions are currently used by a growing number of Canadian public-sector organizations, including municipal governments, public agencies, educational institutions, and non-profit organizations. These organizations use Zoho's cloud platform to support a variety of operational and administrative functions such as financial management, customer service management, workflow automation, analytics, and custom application development. Within the municipal sector, Zoho applications have been deployed to support service management operations, financial administration, and digital service delivery initiatives. Municipal teams commonly leverage solutions such as Zoho Books, Zoho Desk, Zoho CRM, Zoho Analytics, and Zoho Creator to modernize internal workflows, improve service tracking, and enable data-driven decision-making across departments. In addition to municipal deployments, Zoho solutions are also used by Canadian educational institutions, regulatory bodies, and public-sector affiliated organizations to manage operational processes including financial administration, procurement workflows, analytics reporting, and internal service management systems. Many public-sector implementations utilize Zoho's low-code platform (Zoho Creator) alongside core financial and operational applications to build custom applications tailored to government workflows such as service request tracking, internal approvals, regulatory reporting, and departmental process automation. Due to customer confidentiality and privacy commitments, Zoho does not publicly disclose the full list of public-sector customers in Canada. However, reference examples and case studies can be made available during subsequent procurement stages or upon request, where permitted by customer authorization.
3	Describe the maturity of your ERP platform, including years in market, installed base in Canada, and the number and type of public-sector clients currently using your solution. Include a representative sample of public entities currently using your solution.	Maturity of ERP Platform Zoho's ERP platform is built on a mature cloud application ecosystem developed over more than 25 years of enterprise software innovation. Founded in 1996, Zoho has evolved into a global SaaS provider offering more than 55 integrated business applications that collectively support ERP capabilities including financial management, procurement, human resources and payroll, asset management, workflow automation, analytics, and low-code application development. Globally, Zoho supports over 100 million users across hundreds of thousands of organizations spanning commercial, non-profit, and public-sector industries. In Canada, Zoho has established a growing presence through Zoho Canada Corporation, with customers across municipalities, public agencies, educational institutions, and non-profit organizations using Zoho applications to modernize operational and administrative systems. Within the Canadian public sector, organizations commonly use Zoho solutions to support functions such as financial management, customer service operations, workflow automation, analytics, and digital service delivery. These deployments typically leverage Zoho's integrated cloud architecture, enabling organizations to consolidate operational data, automate processes, and improve transparency through configurable workflows and role-based access controls. Representative examples of Canadian public-sector and public-interest organizations currently using Zoho solutions include: Municipal Property Assessment Corporation (MPAC) Elections Alberta Prince Edward Island Department of Health and Wellness Manitoba Economic Development organizations City of Markham City of Peterborough City of Brockville Town of Tillsonburg Municipality of Clarington Town of Halton Hills Town of New Glasgow Dufferin County Girl Guides of Canada Envision Saint John Toronto Association of Business Improvement Areas These organizations represent a cross-section of municipal governments, provincial agencies, public institutions, and non-profit organizations, demonstrating the adaptability of the Zoho platform to support a wide range of public-sector operational and administrative requirements.

4	What do you consider to be the top three market differentiators of your services relative to this solicitation?	Top Three Market Differentiators 1. Unified Cloud Platform with Native Application Integration Zoho provides a fully integrated cloud ecosystem where financial management (Zoho Books), procurement, asset tracking, analytics, workflow automation, and operational applications operate on a unified platform. Unlike many ERP solutions that rely on multiple third-party systems and complex integrations, Zoho applications are designed to work together within a single data architecture. This native integration reduces implementation complexity, improves data consistency, and enables real-time visibility across departments such as finance, procurement, operations, and administration. 2. Lower Total Cost of Ownership through a Cloud-Native SaaS Model Zoho delivers enterprise-grade ERP capabilities through a cloud-based Software-as-a-Service model that significantly reduces total cost of ownership compared to traditional ERP systems. Organizations benefit from predictable subscription pricing, automatic updates, and minimal infrastructure requirements. This approach eliminates the need for costly hardware investments, large upgrade projects, and ongoing infrastructure maintenance while still delivering robust enterprise capabilities for financial management, procurement, reporting, and workflow automation. 3. High Flexibility through Low-Code Extensibility Zoho's platform includes built-in low-code development tools that allow organizations to configure workflows, automate processes, and build custom applications tailored to their operational needs. Using tools such as Zoho Creator and Zoho Flow, public-sector organizations can extend ERP capabilities, digitize departmental processes, and integrate with external systems without extensive custom development. This flexibility enables organizations to adapt quickly to evolving operational requirements while maintaining long-term platform stability. And a 4th differentiator: 4. Vendor Independence and Long-Term Platform Stability Zoho operates as a privately held and profitable technology company, allowing it to focus on long-term platform innovation and customer value rather than short-term market pressures. Unlike many cloud vendors that rely on third-party hyperscale infrastructure providers, Zoho designs, builds, and operates its own global cloud infrastructure. This approach provides greater control over security, reliability, and platform architecture while reducing dependencies on external cloud vendors. For Canadian public-sector organizations, this independence supports greater transparency in how services are delivered and maintained. Zoho also provides Canadian data residency options through its Toronto and Montreal data centres, helping organizations align with Canadian data protection, privacy, and public-sector compliance requirements. This long-term, vendor-controlled platform strategy allows Zoho to deliver continuous innovation while maintaining platform stability, predictable pricing, and strong data governance for government and public-sector customers.
5	Describe your experience with group purchasing, including a list of current cooperative purchasing contracts in North America.	Experience with Group Purchasing Zoho has experience supporting organizations that procure technology solutions through shared procurement frameworks and public-sector contracting mechanisms. While Zoho does not currently maintain a large number of formal cooperative purchasing contracts across North America, the platform's architecture and licensing model are designed to support multi-organization procurement environments effectively. In Canada, Zoho solutions are available through the Ontario Vendor of Record (VOR) program for Customer Relationship Management (CRM) solutions, which enables Ontario public-sector organizations—including municipalities, provincial agencies, and broader public-sector entities—to procure Zoho technology through an established government procurement framework. Zoho's cloud-based SaaS delivery model is well suited for cooperative purchasing environments because it allows participating organizations to adopt the platform through subscription licensing while maintaining independent operational environments. Each organization operates within its own secure tenant, with independent configurations, user roles, data governance policies, and reporting structures, while benefiting from centralized vendor support and continuous platform updates. The Zoho platform also supports multi-organization and multi-entity environments, enabling multiple participating entities to operate within a shared technology ecosystem while maintaining separation of financial records, operational data, and administrative controls. These capabilities allow organizations participating in cooperative purchasing frameworks to standardize technology platforms while preserving operational independence. Zoho's modular platform architecture further supports cooperative procurement models by allowing organizations to adopt either a complete ERP suite or individual applications—such as financial management, procurement workflows, analytics, or service management—based on their operational requirements. This flexibility enables participating members to implement technology solutions that align with their specific maturity level and operational priorities while maintaining compatibility with a shared platform ecosystem. Zoho also offers a transparent and flexible licensing model that aligns well with cooperative purchasing environments. Zoho publishes its product pricing openly on its website, allowing organizations to review licensing structures in advance and plan technology investments with greater transparency. The subscription-based SaaS model enables organizations to scale usage up or down as operational requirements evolve without long-term contractual lock-in. Unlike many traditional enterprise software platforms that rely on complex licensing structures, infrastructure dependencies, and long-term contractual commitments, Zoho provides straightforward subscription pricing and predictable cost structures. This approach reduces procurement complexity and helps public-sector organizations manage technology budgets with greater certainty. By eliminating large upfront license costs, minimizing infrastructure requirements, and avoiding restrictive long-term contracts, Zoho enables cooperative purchasing members to adopt modern ERP capabilities while maintaining financial flexibility and procurement transparency. As Zoho continues to expand its presence in the Canadian public sector, participation in cooperative purchasing frameworks such as CANOE Procurement Group represents an important opportunity to further support shared procurement initiatives across municipalities, provincial and federal agencies, Crown corporations, educational institutions, and other public-sector organizations.

Engagement , Marketing and Training

Line Item	Question	Response *
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1	Describe the engagement and marketing strategy your company will implement if successful in this solicitation. Your answer should be specific to the various types stakeholders involved.	Engagement and Marketing Strategy Zoho's engagement strategy for the CANOE Procurement Group focuses on education, collaboration, and long-term relationship development with member organizations. The strategy is designed to support multiple stakeholder groups—including procurement leaders, executive decision-makers, IT teams, and operational departments—while ensuring that organizations clearly understand how Zoho solutions can support modernization of administrative and operational systems. A. Engagement with CANOE Procurement Group Zoho will collaborate closely with CANOE Procurement Group to ensure successful program adoption and awareness among member organizations. Activities include: Participation in CANOE onboarding sessions to align messaging, procurement processes, and member engagement strategies. Providing solution briefs, educational materials, and product information tailored specifically for CANOE members. Supporting CANOE's communication channels including member newsletters, procurement catalogs, and website listings. Participating in joint webinars, informational sessions, and virtual briefings introducing Zoho ERP capabilities to CANOE member organizations. B. Engagement with Member Organizations Zoho will engage directly with member organizations to help them understand how the platform can support their operational requirements. Activities include: Hosting informational webinars and product demonstrations for procurement teams, executive leadership, and operational departments. Conducting discovery workshops to understand organizational requirements and assess solution fit. Providing onboarding guidance and implementation planning support for organizations adopting Zoho solutions. Sharing best practices and case studies demonstrating successful ERP modernization initiatives within public-sector environments. C. Engagement with Technical and Operational Stakeholders Zoho will provide targeted engagement for technical and operational stakeholders responsible for evaluating and implementing enterprise systems. Activities include: Technical architecture briefings for IT teams covering system architecture, integrations, security controls, and deployment models. Training and enablement sessions for finance, procurement, HR, and operational teams. Providing access to product documentation, integration guides, developer resources, and system administration materials. Facilitating collaboration between member technical teams and Zoho solution experts to support successful deployments. D. Marketing and Awareness Activities Zoho will support CANOE members through educational outreach and awareness initiatives focused on public-sector digital transformation. Activities include: Participation in public-sector technology conferences, procurement workshops, and industry events. Publication of educational content, whitepapers, webinars, and solution briefings focused on ERP modernization and operational efficiency. Collaboration with certified Zoho implementation partners to expand outreach and implementation support across Canada. Development of case studies and success stories highlighting the value delivered to participating public-sector organizations. E. Ongoing Member Support and Relationship Management Zoho will maintain long-term engagement with participating organizations to support continued platform adoption and value realization. Activities include: Providing regular product updates, feature announcements, and best practice guidance. Maintaining open communication channels for technical support, optimization, and solution advisory services. Gathering feedback from CANOE members to inform product improvements and service enhancements. Supporting long-term adoption through ongoing training programs, documentation, and knowledge-sharing initiatives. F. Canadian Partner Ecosystem Engagement Zoho supports a growing ecosystem of certified implementation partners and solution providers across Canada who assist public-sector organizations with deployment, configuration, integrations, and ongoing solution optimization. This partner network enables Zoho to deliver localized expertise and scalable implementation capacity for CANOE members across multiple provinces and municipalities. Zoho partners support a variety of services including: Implementation and configuration services, ensuring that ERP deployments align with each organization's operational requirements and governance structures. Integration services, connecting Zoho ERP capabilities with existing systems such as GIS platforms, asset management systems, procurement portals, and reporting environments. Training and change management support, helping internal teams adopt the platform and transition from legacy systems. Ongoing advisory services, assisting organizations with workflow optimization, reporting enhancements, and platform extensions using Zoho's low-code tools. Zoho works closely with its partner ecosystem to ensure consistent delivery standards, access to product expertise, and alignment with Zoho's platform architecture. Where appropriate, Zoho may provide direct architectural oversight or Enterprise Business Solutions (EBS) support alongside implementation partners to ensure successful project outcomes. This hybrid delivery model enables CANOE members to benefit from both local implementation expertise and direct vendor support, ensuring scalable deployment capabilities across municipalities, provincial and federal agencies, Crown corporations, and other public-sector organizations.
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2	Collaboration between Canoe and the vendor is essential to the buy-in of group purchasing by vendors and their distribution network. What do you expect Canoe's role to be in demonstrating the value of the contract?	Canoe's Role in Demonstrating the Value of the Contract Zoho views the CANOE Procurement Group as an important partner in ensuring that member organizations understand and realize the value of the cooperative purchasing contract. CANOE's established relationships with member organizations, combined with its trusted procurement framework, play a key role in communicating the benefits of the program and encouraging adoption of participating vendor solutions. Program Awareness and Communication Zoho expects CANOE to support awareness of the awarded contract through its existing communication channels, including the supplier directory, procurement catalog, newsletters, and member communications. These channels help ensure that member organizations are informed about the availability of Zoho's ERP solutions through the cooperative purchasing program. By highlighting the advantages of the contract—such as pre-negotiated terms, competitive pricing, and simplified procurement pathways—CANOE can help members understand how the program reduces procurement complexity while providing access to trusted technology vendors. Member Engagement and Education CANOE can also help demonstrate the value of the contract by facilitating engagement between Zoho and interested member organizations. This may include introducing members exploring ERP modernization or digital transformation initiatives to Zoho representatives, as well as supporting educational initiatives such as informational webinars, briefings, and program orientation sessions. These activities help members understand both the procurement process and the capabilities of the solutions available through the CANOE contract. Program Credibility and Vendor Collaboration As a recognized cooperative procurement organization, CANOE provides credibility and assurance that participating vendors have undergone a structured evaluation and selection process. Zoho expects to collaborate closely with CANOE on ongoing outreach activities, member engagement initiatives, and sharing insights on member needs. This collaboration helps ensure that the program continues to deliver measurable value to participating organizations while supporting long-term adoption of modern technology platforms.
3	Describe how you will train your sales force and distribution network on the value of utilizing the group purchasing such as the Canoe contract for public sector and non for profit clients. Include details on measure you will put in place, such as type and cadence of engagement etc.	Training of Sales Force and Distribution Network Zoho will implement a structured enablement program to ensure its sales teams and partner ecosystem clearly understand the value of utilizing cooperative purchasing agreements such as the CANOE contract when working with public-sector and non-profit organizations. Initial Program Enablement Following contract award, Zoho will conduct onboarding training sessions for internal sales representatives, partner consultants, and authorized implementation partners. These sessions will cover the CANOE contract framework, procurement processes, eligibility requirements, and pricing structures available to CANOE members. Training will focus on how municipalities, provincial and federal agencies, Crown corporations, educational institutions, and non-profit organizations can access the agreement and procure Zoho ERP solutions efficiently through the cooperative purchasing model. Ongoing Sales and Partner Education Zoho will provide ongoing enablement through regular training and communications to ensure consistent understanding and positioning of the CANOE contract across the sales and partner network. Engagement activities will include: Quarterly training sessions and sales briefings covering program updates, positioning guidance, and success stories. Webinars and enablement workshops focused on public-sector procurement practices and cooperative purchasing benefits. Sales playbooks and procurement guides distributed through Zoho's internal knowledge platforms and partner portals. Solution demonstration materials and case studies tailored to public-sector use cases. Partner Ecosystem Enablement Zoho's certified implementation partners will also receive training on the CANOE contract and cooperative purchasing model. Partner enablement will include guidance on how to identify CANOE member opportunities, align solution proposals with contract terms, and support participating organizations through implementation and onboarding processes. Engagement Oversight and Support Dedicated Zoho account teams and partner managers will monitor engagement and provide ongoing support to ensure consistent adoption and effective positioning of the CANOE cooperative purchasing program. Zoho will also maintain periodic internal communications and program updates to ensure sales teams remain informed of any contract developments or opportunities for member engagement. In addition, Zoho has recently established a dedicated Public Sector Division within Zoho Canada Corporation, led by its Vice President of Sales alongside an experienced public-sector leader with prior executive leadership experience in municipal government. This team will focus specifically on supporting Canadian public-sector organizations and ensuring effective engagement with cooperative procurement initiatives such as the CANOE program.

4	Describe your methodology and approach to a successful start up / implementation plan and ongoing review and monitoring of the contract use and promotion. Include details on measure you will put in place.	Methodology for Start-Up, Implementation, and Ongoing Monitoring Zoho follows a structured methodology to ensure a successful contract launch, effective adoption by member organizations, and ongoing monitoring of contract utilization for cooperative purchasing agreements such as the CANOE contract. This approach includes coordinated onboarding, member engagement, and ongoing performance review activities. Contract Start-Up and Program Onboarding Upon contract award, Zoho will initiate a start-up phase in collaboration with CANOE Procurement Group to align communication, operational processes, and program objectives. This phase will include: Coordination with CANOE to finalize supplier listings, contract documentation, and program messaging. Establishing key points of contact between Zoho and CANOE program representatives. Development of onboarding materials and solution briefs tailored to CANOE member organizations. Internal enablement for Zoho sales teams and certified implementation partners to ensure clear understanding of the CANOE procurement framework. Member Implementation Support Zoho will provide onboarding and implementation guidance to organizations adopting the platform through the CANOE contract. This support may include: Discovery sessions to understand organizational requirements and solution fit. Guidance on system configuration, integrations, and deployment planning. Access to training materials, knowledge base documentation, and educational webinars. Collaboration with Zoho implementation partners where appropriate to support deployment and change management. These activities help ensure that member organizations can adopt Zoho ERP solutions efficiently and align the platform with their operational processes. Contract Promotion and Member Engagement Zoho will actively support the promotion of the CANOE contract through coordinated outreach and educational initiatives. Activities will include: Participation in informational webinars and member briefings. Collaboration with CANOE on newsletters, supplier directories, and program announcements. Targeted outreach to eligible municipalities, provincial and federal agencies, Crown corporations, and non-profit organizations. Sharing case studies and best practices that demonstrate successful modernization initiatives using Zoho solutions. Ongoing Monitoring and Program Review Zoho will implement ongoing monitoring and review processes to track contract utilization and ensure continuous improvement. Measures will include: Monitoring contract adoption trends among participating member organizations. Tracking engagement metrics such as inquiries, demonstrations, and onboarding activities. Gathering customer feedback and support insights to identify opportunities for service improvements. Conducting periodic internal reviews to evaluate outreach effectiveness and identify opportunities to expand adoption. Zoho will maintain regular communication with CANOE representatives to share insights on member engagement, adoption trends, and opportunities for additional awareness activities. In addition, Zoho would welcome annual strategic review meetings with CANOE leadership to assess contract performance, discuss member feedback, and identify opportunities to expand program awareness and adoption across the cooperative purchasing network. This collaborative approach ensures that the CANOE contract continues to deliver value to member organizations while supporting broader adoption of modern cloud-based enterprise platforms across the public sector.
5	How will you be monitoring the adoption and utilization of the Canoe contract by your sales and distribution network? Which key performance indicators will you be monitoring?	Monitoring Adoption and Utilization of the CANOE Contract Zoho will implement an internal monitoring framework to track the adoption and utilization of the CANOE contract across its sales organization and partner ecosystem. Monitoring will be coordinated through Zoho's internal platforms, including Zoho CRM and Zoho Analytics, which provide centralized reporting dashboards for tracking opportunities, engagements, and transactions associated with the CANOE cooperative purchasing program. Zoho's internal CRM platform enables account teams and sales leadership to track public-sector opportunities and identify when the CANOE contract can be utilized as a procurement pathway. The platform includes AI-powered analytics and forecasting capabilities that help monitor sales activity, identify adoption trends, and generate insights that support effective management of cooperative procurement programs. Zoho will assign internal account management and sales leadership teams to oversee contract adoption and ensure the CANOE agreement is consistently positioned as a procurement option for eligible public-sector and non-profit organizations. Regular internal reviews will be conducted to assess performance, identify opportunities for increased utilization, and ensure alignment with public-sector procurement requirements. To support ongoing monitoring and program accountability, Zoho will track several key performance indicators (KPIs), including: Number of qualified sales opportunities associated with the CANOE contract Number of public-sector and non-profit organizations adopting Zoho solutions through the contract Revenue generated through CANOE contract engagements Sales pipeline progression and conversion rates for CANOE-related opportunities Customer onboarding and implementation progress for new member organizations Customer satisfaction metrics and support response performance These metrics will be reviewed through Zoho's internal reporting dashboards and management reviews to ensure visibility, accountability, and continuous improvement in the utilization of the CANOE contract. Insights generated from these monitoring activities will also help guide outreach strategies and engagement with member organizations.
6	Describe your commitment to attending and/or sponsoring Canoe member engagement events (e.g., reverse trade shows, conventions, golf tournaments, educational offerings, retreats etc.)	Commitment to CANOE Member Engagement Events Zoho is committed to actively supporting CANOE member engagement initiatives through participation in industry events, educational sessions, and networking activities. Zoho recognizes that events such as reverse trade shows, conventions, educational workshops, golf tournaments, and member retreats provide valuable opportunities to engage with public-sector and non-profit organizations, share knowledge, and demonstrate how modern cloud-based enterprise platforms can support operational efficiency and digital transformation. Zoho intends to participate in relevant CANOE member events through attendance, educational presentations, and solution briefings, where appropriate. These engagements may include informational sessions on topics such as ERP modernization, financial management transformation, workflow automation, and the benefits of cloud-based technology platforms. Zoho will focus on delivering educational value and sharing best practices that help member organizations better understand available technology solutions and procurement pathways. Where appropriate, Zoho will also evaluate opportunities to sponsor selected CANOE member engagement activities, including conferences, reverse trade shows, educational programs, and networking events. Sponsorship participation will help support CANOE's outreach initiatives while increasing awareness of the cooperative purchasing program among eligible member organizations. Zoho will coordinate its participation with CANOE's program administration team to ensure engagement activities align with member needs and event objectives. Zoho anticipates participating in relevant annual and regional CANOE events and supporting educational opportunities that promote collaboration, knowledge sharing, and awareness of cooperative procurement solutions for the public sector and non-profit communities. In addition, Zoho is committed to ensuring that senior leadership representation is present at key CANOE events, including participation from Zoho Canada's public-sector leadership team where appropriate. Zoho is already actively engaged in the Canadian public-sector technology community and currently serves as a key sponsor of MISA (Municipal Information Systems Association of Canada) and the national sponsor of CIOCAN, both of which include public-sector technology leaders from municipalities, provincial and federal government organizations, and broader public-sector institutions. This ongoing engagement reflects Zoho's commitment to building long-term relationships and supporting digital transformation initiatives across Canada's public sector.

7	Provide details on industry and association partnerships your company has fostered over time which will be beneficial to promoting the CANOE contract in Canada.	Industry and Association Partnerships Zoho has developed strong relationships with industry associations, professional communities, and technology ecosystems that support the adoption of modern cloud platforms across the Canadian public sector. These partnerships help raise awareness of digital transformation opportunities and provide valuable channels for sharing knowledge and best practices related to enterprise systems such as Zoho's ERP and financial management solutions. In Canada, Zoho actively participates in several organizations that bring together public-sector technology leaders and decision-makers. Zoho is currently a key sponsor of MISA (Municipal Information Systems Association of Canada), an organization representing municipal government technology leaders and CIOs across Canada. Through this engagement, Zoho participates in conferences, educational sessions, and networking events that support knowledge sharing and innovation in municipal technology environments. Zoho also serves as the national sponsor of CIOCAN, a professional network that includes senior technology leaders from public-sector organizations, municipalities, and broader enterprise environments across Canada. Participation in CIOCAN enables Zoho to engage with technology executives, share insights on digital transformation and cloud adoption, and contribute to discussions on modernizing enterprise systems in the public sector. These partnerships provide valuable opportunities to support the promotion of the CANOE contract by increasing awareness of Zoho solutions among public-sector technology leaders and procurement decision-makers. Through participation in industry conferences, workshops, and educational sessions, Zoho can help inform member organizations about cooperative purchasing options and demonstrate how cloud-based ERP platforms can support operational modernization. In addition to these industry associations, Zoho maintains a broad ecosystem of technology integrations, implementation partners, and developer communities that extend the capabilities of the Zoho platform. Zoho's open API architecture allows integration with widely used platforms for banking, payments, analytics, document management, and workflow automation, enabling public-sector and non-profit organizations to connect Zoho ERP solutions with their existing operational systems. Zoho also supports a growing Canadian partner ecosystem of certified implementation providers and technology consultants who assist public-sector organizations with deployment, configuration, integrations, and ongoing platform optimization. These partners provide localized expertise and implementation support across multiple regions in Canada, helping ensure that CANOE member organizations have access to both vendor expertise and regional delivery capabilities when adopting Zoho solutions. Together, these industry relationships, professional networks, and partner collaborations support Zoho's ability to engage effectively with Canadian public-sector organizations and help promote awareness and adoption of the CANOE cooperative purchasing program.
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Sales and distribution network

Question	Response *
Describe your company's capability to meet the CANOE Member needs across Canada or for each geographical area the Proponent wishes to do business in. Your response should address at least the following areas. a. Sales force. b. Reseller network or distribution methods if any. Please include details, such as the locations of your network of sales.	Capability to Support CANOE Members Across Canada Zoho has the capability to support CANOE members across Canada through a combination of its direct sales organization, Canadian regional presence, experienced partner ecosystem, and global delivery resources. Zoho's cloud-based SaaS delivery model allows organizations across all provinces and territories to access the platform without the need for on-premise infrastructure, enabling consistent service delivery regardless of geographic location. A. Sales Force Zoho maintains a dedicated North American sales organization supported by Zoho Canada Corporation, which provides regional engagement for Canadian customers. Zoho's Canadian public-sector and enterprise sales teams operate from multiple locations across Canada, including Vancouver, Toronto, Cornwall (Ontario), and Montreal, providing coverage for organizations across the country. Sales representatives and solution consultants support CANOE members through a combination of: Direct engagement with public-sector organizations and non-profit entities Virtual product demonstrations and solution workshops Regional outreach and participation in public-sector technology events Ongoing account management and customer success support Because Zoho solutions are delivered as cloud-based services, organizations in all geographic regions—including remote and rural municipalities—can access the same level of product demonstrations, onboarding guidance, and support services as those located in major urban centres. B. Reseller Network and Distribution Model Zoho primarily delivers its ERP and financial management solutions through a direct SaaS subscription model, allowing organizations to procure and deploy the platform efficiently through standardized licensing and cloud-based delivery. In addition to its direct sales organization, Zoho supports a growing ecosystem of authorized implementation partners and solution providers who assist with system configuration, integrations, training, and change management services. Zoho currently works with over 120 authorized partners across Canada, providing regional delivery capabilities for CANOE members. Many of Zoho's Canadian implementation partners have been working with Zoho solutions for up to 15 years, with the core partner ecosystem averaging 7–8 years of experience implementing Zoho platforms. This long-standing partner community provides CANOE members with experienced local resources capable of supporting deployments, integrations, and long-term solution optimization. Zoho also maintains relationships with leading global systems integrators—including Capgemini, Tata Consultancy Services (TCS), and Infosys—who support larger enterprise and public-sector deployments requiring additional integration and transformation services. Global Delivery Support In addition to its Canadian sales and partner network, Zoho leverages its Enterprise Business Solutions (EBS) delivery teams located in North America and India, which have extensive experience implementing Zoho solutions for organizations worldwide. Zoho follows a hybrid delivery approach, where project leadership, governance, and customer engagement are typically managed locally through Canadian teams or implementation partners, while specialized configuration, development, and integration expertise may be supported by Zoho's global engineering teams. This model allows CANOE members to benefit from local project oversight combined with scalable global technical expertise, helping ensure efficient project delivery while maintaining strong customer engagement and accountability. Together, Zoho's Canadian sales presence, experienced partner ecosystem, global system integrator relationships, and hybrid delivery capabilities enable Zoho to effectively support municipalities, provincial and federal agencies, Crown corporations, educational institutions, and non-profit organizations across Canada.

Describe your how you manage government sales. Include details on the sales and training structure and how you specifically address sales and marketing with public sector clients in a group procurement context.	Management of Government Sales Zoho manages government and public-sector sales through a structured sales and solution consulting framework designed to address the operational, financial, and procurement requirements of public-sector organizations. Zoho's approach combines dedicated public-sector sales leadership, solution consulting expertise, and ongoing training programs to ensure effective engagement with government, municipal, and non-profit clients. Zoho's sales organization includes account executives, solution consultants, and customer success specialists who work collaboratively to understand client requirements, demonstrate system capabilities, and align Zoho's cloud-based ERP solutions—including Zoho Books and the broader Zoho ERP platform—with the financial management, procurement, and operational needs of public-sector organizations. To support public-sector engagement in Canada, Zoho has established a dedicated Public Sector Division within Zoho Canada Corporation, led by senior leadership and supported by experienced professionals with direct experience working in municipal government environments. This team focuses on helping public-sector organizations modernize administrative systems, streamline financial operations, and adopt secure cloud-based platforms. Sales and Training Structure Zoho provides structured enablement programs for its sales teams and partner ecosystem to ensure consistent engagement with government clients. Training programs include: Education on public-sector procurement processes and compliance considerations Guidance on positioning Zoho solutions within cooperative purchasing frameworks such as CANOE Product and solution training covering financial management, procurement workflows, analytics, and workflow automation Sales playbooks and case studies focused on public-sector digital transformation initiatives Sales and partner enablement is reinforced through regular internal briefings, training sessions, and knowledge-sharing resources to ensure teams remain informed of program requirements, best practices, and emerging public-sector opportunities. Public Sector Marketing and Engagement In a group procurement context, Zoho emphasizes education and awareness rather than traditional product marketing. Engagement activities are designed to help public-sector organizations understand the benefits of modern cloud-based ERP systems and cooperative purchasing frameworks. Typical engagement activities include: Product demonstrations and informational briefings for government and non-profit organizations Educational webinars focused on ERP modernization, financial transparency, and digital service delivery Participation in public-sector technology events and professional associations Collaboration with cooperative purchasing organizations such as CANOE to communicate the benefits of pre-negotiated procurement agreements Ethical Sales Practices and Procurement Compliance Zoho is committed to conducting public-sector sales in accordance with ethical business practices and government procurement standards. Sales teams are trained to follow transparent engagement practices, respect competitive procurement processes, and ensure that all communications with public-sector organizations align with applicable procurement policies and regulations. This approach ensures that Zoho's engagement with government clients remains professional, transparent, and fully compliant with cooperative purchasing and public-sector procurement frameworks. Through this structured sales management approach, Zoho ensures that its teams are well prepared to support public-sector clients while promoting efficient procurement pathways and helping organizations adopt modern, secure ERP platforms through cooperative purchasing programs.
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Describe in details the process and procedure of your customer service program, if applicable. Include your response-time capabilities and commitments, as well as any incentives that help your providers meet your service goals or promises.	Customer Service Program Zoho provides a structured customer service and support program designed to ensure reliable assistance, timely issue resolution, and continuous operational support for organizations using Zoho Books and the broader Zoho ERP ecosystem. Zoho's support services are delivered through dedicated technical support teams supported by standardized ticket management systems, escalation procedures, and ongoing service performance monitoring. Customers can access Zoho support through multiple service channels including email, telephone, live chat, screen-sharing sessions, and Zoho's online support portal. Support requests are logged through the centralized support system, where tickets are categorized, prioritized, and assigned to technical specialists for investigation and resolution. Customers can track the status of their requests through the portal and communicate directly with support engineers throughout the resolution process. Support Tiers and Response-Time Commitments Zoho offers several support tiers to meet the operational needs of different organizations: Classic Support (Standard Support) The Classic Support plan is included with most Zoho subscriptions and provides: Email support and ticket-based assistance Phone and live chat support during business hours (approximately 8 hours per day, Monday to Friday) Access to Zoho's knowledge base, documentation, and community forums Premium Support Organizations requiring extended coverage may opt for Premium Support, which includes: 24x5 support availability through phone, chat, and email Faster response times, with initial response targets of approximately three hours Priority ticket handling and accelerated escalation procedures Enterprise Support For mission-critical deployments, Zoho offers Enterprise Support with enhanced service levels, including: 24x7 support availability across phone, email, and chat channels Response-time targets of approximately one hour for critical issues Access to senior technical specialists and advanced support resources Issue Resolution and Escalation Process Support requests follow a structured resolution process: Initial Triage – Tickets are reviewed by the customer support team and categorized based on severity and service impact. Technical Investigation – Issues are assigned to specialized technical engineers for analysis and troubleshooting. Escalation – Complex issues or platform-level defects are escalated to Zoho's product engineering teams when required. Resolution and Follow-Up – Once resolved, customers receive confirmation and guidance to prevent recurrence. Zoho also provides remote troubleshooting and screen-sharing assistance when necessary to accelerate issue diagnosis and resolution. Service Monitoring and Continuous Improvement Zoho continuously monitors support performance through internal service management metrics, including: Response time to customer requests Issue resolution time Ticket escalation and closure rates Customer satisfaction feedback and service quality metrics These indicators are reviewed regularly to ensure Zoho consistently meets its service commitments and maintains high levels of customer satisfaction. Support teams are evaluated against these performance indicators, helping ensure accountability and continuous improvement in service delivery. Implementation Hypercare Support During the implementation and initial deployment phase, Zoho may provide an enhanced support period commonly referred to as "hypercare." During this phase, Zoho implementation teams and support specialists work closely with the customer's project team to ensure a smooth transition to production operations. Hypercare support may include: Increased availability of technical support resources during the early deployment period Rapid response to configuration or integration issues identified during initial system use Direct collaboration between implementation consultants, support engineers, and the customer's project team Monitoring of system performance and operational workflows following go-live Once the hypercare period concludes, customers transition to the standard Zoho support program based on their selected support tier. Through this structured customer service framework, Zoho ensures that organizations adopting Zoho ERP and financial management solutions receive responsive, reliable, and scalable support throughout the lifecycle of their deployment.
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Member access to program offering

Line Item	Question	Response
1	List the necessary steps for a Canoe member to set up an account and access your program offering for the first time should you be awarded a contract.	Account Setup and Initial Access Process If Zoho is awarded a contract under the Canoe cooperative purchasing program, Canoe members can access Zoho's ERP platform through a structured onboarding and implementation process designed to ensure efficient procurement, rapid deployment, and successful adoption of the solution. 1. Initial Engagement and Requirements Discovery Canoe members may initiate engagement with Zoho through the Canoe contract channel or directly through Zoho's public sector sales organization. Zoho's sales representatives and pre-sales solution engineers conduct structured discovery discussions to understand the organization's operational requirements, existing systems, and ERP functional needs. 2. Solution Demonstration and Evaluation Following the discovery phase, Zoho may provide tailored product demonstrations, solution briefings, and where appropriate, proof-of-concept (POC) environments. These activities allow the member organization to evaluate the capabilities of Zoho ERP applications such as Zoho Books, Zoho Inventory, Zoho Analytics, Zoho Payroll, and related platform services. 3. Account Registration and Environment Provisioning Once the organization confirms the solution scope, Zoho provisions a secure cloud environment and the organization registers a Zoho account. The member designates system administrators responsible for managing the environment, user access, and governance. 4. Subscription Activation through the Canoe Contract The selected Zoho applications are activated under the Canoe contract pricing structure. Zoho's licensing activation and onboarding processes are designed to align with cooperative procurement programs, allowing Canoe members to efficiently procure and deploy the platform. 5. System Configuration and Initial Setup Zoho provides onboarding guidance to assist with initial configuration activities such as organizational settings, chart of accounts configuration, user roles and permissions, approval workflows, and integration setup with existing systems where applicable. 6. Implementation and Customization (If Required) Where organizations require additional configuration or integration, Zoho may deliver the implementation directly through Zoho's Enterprise Business Solutions (EBS) team or through certified Zoho implementation partners. Implementation activities may include discovery workshops, workflow configuration, data migration, integration development, and system testing using Zoho platform tools such as Zoho Creator, Zoho Flow, and secure APIs. Zoho follows a hybrid delivery approach where project leadership and customer engagement are typically managed locally through Zoho Canada or certified Canadian implementation partners, while specialized configuration or development expertise may be supported by Zoho's global engineering and EBS teams when appropriate. This model provides Canoe members with local engagement combined with scalable global technical expertise. 7. Training and Onboarding Zoho provides training resources including documentation, administrator guidance, webinars, and user training sessions to ensure internal teams are prepared to operate the system effectively. 8. Go-Live and Ongoing Support Following configuration, testing, and user validation, the system is deployed for operational use. Zoho provides ongoing technical support, customer success engagement, and account management to ensure Canoe members continue to receive assistance, platform updates, and operational guidance. Zoho's sales teams, pre-sales engineers, onboarding specialists, and customer success managers are experienced in conducting discovery sessions, demonstrations, proof-of-concept engagements, and implementation onboarding. These processes are well established and aligned with cooperative procurement programs such as Canoe, ensuring member organizations can efficiently evaluate, procure, deploy, and operate Zoho ERP solutions.
2	Describe how members can access information, pricing, discounts, services, get a quote and place an order.	Accessing Information, Pricing, Quotes, and Ordering If Zoho is awarded a contract under the Canoe cooperative purchasing program, Canoe members will be able to access Zoho ERP and financial management solutions, including Zoho Books and related Zoho platform applications, through a clear and structured procurement and onboarding process. 1. Access Program and Product Information Canoe members can obtain information about Zoho's ERP and financial management solutions through the Canoe program supplier listing, Zoho's official website, or by contacting Zoho's public sector sales team. Detailed product information, solution overviews, documentation, and technical resources are available online to help members understand platform capabilities and evaluate solution fit. 2. Access Pricing and Contract Discounts Members can obtain pricing and applicable discounts associated with the Canoe contract by contacting Zoho directly through the designated Canoe contract contact channel. Zoho will provide pricing aligned with the cooperative purchasing agreement and based on the selected applications, number of users, and service requirements. Zoho also maintains transparent product pricing on its public website, allowing organizations to review standard subscription pricing and understand potential savings available through the Canoe program. 3. Request a Quote After discussing the member organization's requirements, Zoho will prepare a formal quotation outlining the proposed solution, including the applicable Zoho applications (such as Zoho Books, Zoho Inventory, Zoho Analytics, Zoho Payroll, and related services), subscription costs, contract discounts, and any optional implementation or integration services. 4. Place an Order Once the quotation is approved, the Canoe member may place an order through a purchase order or participating addendum referencing the Canoe contract. Upon receipt of the order, Zoho will activate the subscription, provision the customer environment, and initiate the onboarding process for the organization. 5. Implementation and Service Engagement (if applicable) If the member organization requires implementation services, configuration assistance, or integrations with third-party systems, Zoho follows a structured engagement methodology. Following discovery sessions and requirements analysis, Zoho works with the member organization to develop a Business Requirements Document (BRD) outlining the functional requirements, system configuration needs, data migration considerations, and any required integrations with external systems. Based on the approved requirements, Zoho or the implementation partner prepares a Statement of Work (SOW) and implementation proposal that defines the project scope, implementation approach, responsibilities, delivery timeline, and resource requirements. An implementation plan is then developed to guide configuration, testing, user training, and deployment activities. Implementation services may be delivered directly by Zoho's Enterprise Business Solutions (EBS) team or through certified Zoho implementation partners, ensuring Canoe members receive the appropriate level of technical and project delivery support. Through this structured process, Canoe members can efficiently access information, obtain pricing and quotes, procure Zoho ERP solutions, and implement the platform while benefiting from the streamlined procurement advantages provided by the cooperative purchasing program.
3	In a case where your company has an existing public sector customer who desires to be onboarded onto the Canoe offering, how would you address this situation?	Transition of Existing Public-Sector Customers to the Canoe Contract If Zoho has an existing public-sector customer that wishes to transition to the Canoe cooperative purchasing program, Zoho will follow a structured process to align the customer's current subscription with the Canoe contract while ensuring continuity of service and minimal administrative effort for the organization. First, Zoho will review the customer's current subscription agreement, licensing structure, and active services, including applications such as Zoho Books and other Zoho ERP platform components. Zoho will then determine the most appropriate path to align the existing agreement with the Canoe contract pricing and terms. In most cases, the transition will occur at the next subscription renewal, where the customer may reference the Canoe contract within their renewal purchase order or execute a participating addendum aligned with the Canoe agreement. Where appropriate and mutually agreed, Zoho may also amend the existing agreement prior to renewal to align the customer with the Canoe contract pricing and program structure. Because Zoho services are delivered through a cloud-based SaaS platform, the transition typically involves administrative and contractual alignment rather than any technical migration or system disruption. The customer's environment, system configuration, and operational data remain unchanged, ensuring uninterrupted service and continued system access throughout the transition process. Zoho will also provide administrative guidance to help the organization complete any required procurement documentation and ensure the Canoe contract is properly referenced within the organization's purchasing procedures. This approach allows existing customers to benefit from the pre-negotiated pricing, standardized terms, and streamlined procurement advantages of the Canoe cooperative purchasing program while maintaining continuity of service and platform usage. Through this process, Zoho ensures that current public-sector customers—including municipalities, provincial agencies, federal departments, Crown corporations, and non-profit organizations—can efficiently align their subscriptions with the Canoe program while continuing to operate on Zoho's secure, cloud-native ERP platform. Zoho's SaaS architecture, transparent licensing model, and structured onboarding processes enable Canoe members to modernize administrative and financial operations while reducing procurement complexity, minimizing implementation risk, and accelerating adoption of modern cloud-based ERP capabilities.

Implementation Network

This section focuses on implementation partner information for Members. Implementation services are not included in this RFP. Do not include your marketing or promotional material.

Question	Answer *
Do you have a partner network? Enter "yes" or "no", if "no", explain how clients implement your software. If "yes" move on to question 2.	YES
Describe your implementation partner network, including tiers, mandatory certifications, areas of specialization, and any restrictions or required approvals that limit our choice of partner for specific modules or deployments.	Implementation Partner Network Zoho maintains a global partner ecosystem that supports the implementation, configuration, integration, and deployment of Zoho solutions, including Zoho Books and the broader Zoho ERP platform. This partner network consists of consulting firms, system integrators, and technology service providers that assist customers with implementation services, solution customization, integrations with third-party systems, and ongoing operational support. Partner Tiers Zoho partners are categorized into multiple tiers based on experience, delivery capability, and demonstrated success implementing Zoho solutions. These tiers generally include Authorized Partners, Advanced Partners, and Premium Partners. Higher-tier partners demonstrate deeper implementation expertise, larger teams of certified professionals, and a proven track record of successful deployments across multiple industries and organizational environments. Mandatory Certifications Zoho implementation partners are required to complete formal Zoho product certification and training programs covering the functional and technical aspects of the platform. These certifications include training in areas such as Zoho Books financial configuration, workflow automation, integrations, reporting, and platform administration. Certification programs ensure partners possess the necessary technical knowledge and best-practice implementation methodologies to support ERP-style deployments and financial management systems. Areas of Specialization Partners within the Zoho ecosystem often specialize in specific functional or technical areas, including: Financial management and accounting system implementations ERP platform configuration and business process automation Workflow automation and operational system design Integrations with external systems such as procurement portals, banking platforms, and reporting systems Data migration and legacy system modernization initiatives Custom application development using Zoho Creator and other platform tools Many partners also develop industry-specific expertise supporting public-sector organizations, professional services firms, non-profit institutions, and other regulated environments. Canadian Partner Ecosystem Zoho maintains an established partner ecosystem in Canada consisting of more than 120 authorized Zoho partners across the country. These partners provide implementation, integration, and consulting services to organizations in multiple provinces, supporting public-sector, non-profit, and commercial deployments. Many of Zoho's Canadian implementation partners have worked with Zoho technologies for more than a decade, with the core partner ecosystem averaging approximately 7-8 years of platform experience. This Canadian partner network enables Canoe members to work with implementation providers who understand regional regulatory environments, public-sector operational practices, and local delivery requirements. Partner Selection and Deployment Flexibility Canoe members are not restricted to working with a specific implementation partner for particular modules or deployments. Organizations may choose to work directly with Zoho's internal implementation teams, including Zoho's Enterprise Business Solutions (EBS) team, or select an authorized Zoho implementation partner based on project scope, geographic presence, or specialized expertise. For larger or more complex ERP implementations, Zoho may recommend experienced partners with demonstrated delivery capability; however, the final choice of implementation partner remains with the customer organization. This flexible delivery model allows Canoe members to select the approach that best aligns with their internal governance, procurement preferences, and project requirements. Additional information about Zoho's partner ecosystem is available at: https://www.zoho.com/partners/ Through this combination of a global partner ecosystem and an established Canadian implementation network, Zoho provides Canoe members with access to experienced delivery teams while maintaining flexibility to deploy solutions directly through Zoho or through certified partners. This approach supports reliable implementation and long-term success for organizations adopting Zoho's secure, cloud-native ERP platform.
Describe your partner certification process.	Partner Certification Process Zoho maintains a structured partner certification and enablement program to ensure that partners implementing Zoho solutions, including Zoho Books and the broader Zoho ERP platform, possess the technical expertise, implementation experience, and delivery capabilities required to support successful customer deployments. The certification process begins with partner onboarding, where interested consulting firms, system integrators, and solution providers apply to join the Zoho Partner Program. During this stage, Zoho evaluates the applicant organization based on its business profile, implementation capabilities, technical expertise, and market focus. Approved partners are granted access to Zoho's partner ecosystem resources, including the partner portal, training materials, technical documentation, and implementation guidance. Following onboarding, partners participate in product-specific training programs designed to provide in-depth knowledge of Zoho applications and platform architecture. These training programs cover areas such as product functionality, system configuration, workflow automation, integrations, reporting capabilities, and implementation best practices. For example, Zoho Books certification includes training on financial configuration, accounting workflows, tax management, reporting, and integration with other Zoho ERP applications. After completing the training modules, partners must pass certification assessments and practical evaluations to validate their knowledge and ability to implement Zoho solutions effectively. Partners who successfully complete these requirements receive official certification and are authorized to deliver implementation services and customer support for Zoho products. Zoho also evaluates and classifies partners into different partner tiers, typically including Authorized Partners, Advanced Partners, and Premium Partners. These tiers are determined through a combination of factors such as revenue attainment, technical experience and certifications, customer satisfaction scores, demonstrated implementation success through case studies, and overall engagement with Zoho's partner ecosystem. Higher-tier partners demonstrate deeper technical expertise, a stronger track record of successful deployments, and consistent delivery performance. Zoho promotes continuous learning and ongoing certification maintenance, encouraging partners to participate in advanced training sessions, updated certification programs, and product release briefings to ensure they remain current with new platform capabilities, security practices, and implementation methodologies. Through this structured certification and partner enablement framework, Zoho ensures that its partner ecosystem maintains consistent delivery standards and provides organizations with access to qualified professionals capable of implementing and supporting Zoho ERP solutions. Additional information about Zoho's partner certification and enablement programs is available at: https://www.zoho.com/spark/partners.html

Describe how you monitor performance of your implementation network, performance review and circumstances under which the partnership status would be revoked.	Monitoring and Governance of Implementation Partner Performance Zoho maintains structured oversight of its implementation partner network to ensure consistent service quality and successful delivery of Zoho solutions, including Zoho Books and the broader Zoho ERP platform. Partner performance is monitored through a combination of operational metrics, customer feedback, and program participation indicators. Zoho evaluates partners based on several performance factors including successful project delivery, customer satisfaction and feedback, responsiveness to support or implementation issues, adherence to Zoho implementation best practices, and demonstrated product expertise through certifications and ongoing training. Zoho also monitors partner engagement within the partner ecosystem, including participation in product enablement programs, certification renewals, technical training sessions, and adoption of new product capabilities. These measures help ensure that partners maintain current knowledge of the Zoho platform and continue to deliver solutions in accordance with Zoho's recommended implementation standards. In addition to formal monitoring processes, Zoho maintains close working relationships with many of its implementation partners through its regional partner management teams. Zoho's Canadian partner ecosystem includes organizations that have worked with Zoho technologies for many years, creating strong collaboration, institutional knowledge, and trusted delivery practices. Zoho's Vice President of Sales for Canada originally established Zoho's global partner program and has maintained long-standing relationships with many implementation partners over more than a decade. These long-term relationships foster trust, open communication, and accountability across the partner network. Zoho also hosts Zoho Inspire Canada, an annual national partner event that brings together the majority of Zoho's Canadian partner ecosystem. This two-day event typically includes product workshops, technical training sessions, business updates, and partner collaboration forums, with participation from more than 75% of Zoho Canada's implementation partners. The event provides an important opportunity for Zoho to engage directly with partners, communicate product roadmap updates, reinforce best practices, and strengthen alignment between Zoho and its partner network. Zoho conducts periodic partner performance reviews to assess implementation quality, customer outcomes, and compliance with Zoho's partner program guidelines. These reviews help identify areas for improvement, provide guidance to partners on best practices, and ensure that partners maintain the technical capability and service standards required to support customer deployments. Partnership status may be reviewed, suspended, or revoked under certain circumstances. These may include: Repeated or substantiated customer complaints regarding implementation quality or service delivery Failure to maintain required certifications or technical training requirements Non-compliance with Zoho partner program policies or contractual obligations Misrepresentation of Zoho products, services, or capabilities Violation of Zoho's partner program code of conduct, including unethical business practices, fraud, corruption, conflicts of interest, or improper handling of customer data Actions that negatively impact customer trust, service quality, or Zoho's reputation Failure to maintain active engagement within the Zoho partner program When performance concerns are identified, Zoho typically works with the partner to address the issue through corrective actions or additional training. However, in cases where partners fail to meet required standards or do not remedy identified issues, Zoho may suspend or terminate the partner's authorization to implement Zoho solutions. Through this structured monitoring, engagement, and governance framework, Zoho ensures that its implementation partner ecosystem maintains high delivery standards and provides organizations with access to qualified partners capable of successfully deploying Zoho's secure, cloud-based ERP platform.
How do you support the implementation of your software through your implementation network?	Support for Implementation through the Partner Network Zoho supports the implementation of its software solutions through a collaborative delivery model that combines partner expertise, Zoho solution consulting resources, and centralized technical support. This approach ensures that certified implementation partners can deliver consistent, high-quality deployments of Zoho solutions, including Zoho Books and the broader Zoho ERP platform. Most implementation engagements begin with direct interaction between the customer and Zoho's sales and solution consulting teams. During this stage, Zoho conducts discovery discussions and solution evaluations to understand the customer's operational requirements, existing systems, and the scope of the implementation. This early involvement ensures Zoho's local teams have a clear understanding of the project requirements, including configuration needs, integrations with third-party systems, and any required customization. Based on this assessment, Zoho may recommend one or more authorized implementation partners that are well suited to the project. Recommendations may consider factors such as the complexity of the deployment, the partner's technical specialization, prior implementation experience, and in some cases geographic proximity to the customer organization. While Zoho may recommend experienced partners to help ensure successful delivery, the final selection of an implementation partner remains with the customer. Zoho's partner ecosystem includes organizations with extensive experience implementing Zoho solutions. Many partners have worked with the Zoho platform for several years and have developed deep technical knowledge of product configuration, integrations, workflow automation, and system architecture. Partners maintain their expertise through product certification programs, ongoing collaboration with Zoho teams, and practical experience across multiple customer deployments. During implementation projects, partners may collaborate directly with Zoho's solution consulting teams, technical specialists, and product support engineers when addressing complex requirements such as integrations with third-party systems, advanced workflow automation, or platform customization. Zoho provides access to APIs, developer tools, and platform services that allow partners to extend the system and support specialized operational workflows. Zoho also provides technical support and escalation channels that partners can use throughout the implementation lifecycle. These channels allow partners to obtain product guidance, escalate technical issues, and resolve configuration or integration challenges quickly. For projects involving complex technical requirements, Zoho's internal teams—including the Enterprise Business Solutions (EBS) group—may collaborate with the partner to provide additional technical expertise. Supporting documentation, technical references, and best-practice implementation guidance are also available through Zoho's partner resources and training programs. Through this collaborative delivery model, Zoho ensures that implementation partners have access to the expertise and technical support required to deliver reliable deployments while maintaining alignment with Zoho's platform standards and best practices. This approach helps organizations adopting Zoho solutions achieve successful implementation outcomes and long-term operational stability.
Do you offer the same level of support to all your implementation partners?	Support Provided to Implementation Partners Yes, Zoho provides a consistent baseline level of technical and program support to all authorized implementation partners to ensure they can successfully deploy and support Zoho solutions, including Zoho Books and the broader Zoho ERP platform. All partners receive access to core enablement resources, including product documentation, technical reference materials, implementation guidance, training resources, and certification programs. Partners also have access to Zoho's technical support channels, which allow them to submit support requests, obtain configuration or integration guidance, and escalate complex technical issues to Zoho's support engineers when necessary. Zoho also provides partners with ongoing technical updates, product release information, and training opportunities to help them remain current with evolving platform capabilities and implementation best practices. While the core support framework is available to all partners, partners with greater implementation experience or higher delivery volumes may naturally develop deeper collaboration with Zoho teams through their ongoing project work and participation in partner programs. In addition, some partners further strengthen their expertise by investing in additional training and direct engagement with Zoho's product teams. For example, certain partners periodically visit Zoho's headquarters in Chennai, India, where they work closely with product management and technical specialists to deepen their understanding of platform capabilities and roadmap developments. Some partners also maintain multi-geographic operations, which can give them access to additional Zoho technical resources and broader implementation experience across regions. This combination of standardized partner support and partner-driven expertise development helps ensure that Zoho's implementation ecosystem maintains strong technical capability while delivering reliable and consistent implementations for customers.

Environmental and social governance ESG

Question	Response *
Describe your corporate ESG initiatives.	Corporate Environmental, Social, and Governance (ESG) Initiatives Zoho Canada Corporation aligns with Zoho Corporation's global commitment to Environmental, Social, and Governance (ESG) principles by promoting responsible technology development, sustainable operations, ethical governance, and community-focused initiatives. Zoho's corporate philosophy emphasizes long-term sustainability, responsible innovation, and the creation of positive economic and social impact. Environmental Responsibility Zoho supports environmentally responsible operations through its cloud-based software delivery model and sustainable infrastructure practices. By providing Software-as-a-Service (SaaS) applications such as Zoho Books and the broader Zoho ERP platform, Zoho enables organizations to reduce reliance on energy-intensive on-premise infrastructure and associated hardware requirements. Zoho also invests in environmentally sustainable infrastructure and workplace practices. Several Zoho campuses and infrastructure facilities incorporate renewable energy generation, including solar-powered energy systems that support Zoho's global technology operations. In certain locations, Zoho operates facilities that generate net surplus renewable energy, and when combined across these sites, this renewable energy production helps offset the energy consumption of Zoho's global data center infrastructure, which includes more than 15 data centers worldwide. Zoho's infrastructure strategy focuses on efficient resource utilization, responsible data center management, and long-term environmental sustainability in the delivery of cloud-based services. Social Responsibility Zoho maintains a strong focus on workforce development, education, diversity, and inclusive economic growth. One of Zoho's flagship initiatives is the Zoho Schools of Learning program, which provides alternative education and technical training opportunities for students who may not follow traditional university pathways. Graduates of the program receive practical training in software development and technology careers, creating employment opportunities while addressing skills shortages in the technology sector. Zoho also promotes a distributed workforce model, establishing offices in smaller communities and regional areas to support local economic development while reducing urban concentration and commuting-related environmental impact. This approach contributes to regional job creation and balanced economic growth. In addition, Zoho supports greater workforce participation through initiatives such as its Women in the Workforce program, which focuses on expanding employment opportunities for women returning to the workforce or seeking to develop careers in technology and related fields. These programs provide training, mentorship, and professional development opportunities designed to support career growth and promote greater diversity within the technology sector. In Canada, Zoho engages with technology communities, professional associations, and public-sector organizations through partnerships, knowledge-sharing initiatives, and participation in industry forums supporting digital transformation and technology adoption. Governance and Ethical Business Practices Zoho maintains strong governance practices centered on data privacy, security, transparency, and ethical business conduct. As a privately held and profitable company, Zoho operates with a long-term business philosophy that prioritizes customer trust, product quality, and sustainable growth rather than short-term market pressures. Zoho maintains comprehensive data protection and security controls aligned with internationally recognized standards including ISO/IEC 27001, ISO/IEC 27017, ISO/IEC 27018, ISO/IEC 27701, SOC 2 Type II, and CSA STAR. Zoho also promotes strong privacy principles, emphasizing customer data ownership and responsible data management. Through these environmental, social, and governance initiatives, Zoho demonstrates its commitment to responsible corporate practices, sustainable technology development, and the long-term success of the communities and organizations it serves.

Schedule "B1"

PRICING

Schedule “C”

MARKETING AND PROMOTION OF AGREEMENT

Once the Agreement is awarded, the Supplier will meet with Canoe to discuss an effective launch strategy, and shall provide:

- Supplier’s contact information;
- Customer engagement strategy;
- Access to knowledge sharing materials (e.g., webinars);
- Escalation process;
- Marketing materials, and,
- Other relevant materials.

To support Members, Canoe and the Supplier will work together to encourage the use of the Agreement resulting from this RFP.

The Supplier will actively promote the Agreement to Members by:

- Educating and creating awareness within their dealer and distribution networks about group purchasing, Canoe Procurement Group and the use of Canoe contract by Members;
- Conducting sales and marketing activities directly to onboard Members;
- Providing excellent and responsive Members support;
- Identifying Members savings; and
- Identifying improvement opportunities (e.g., planning priorities, multi-year projects).

Canoe will promote the use of the Agreement with Members by:

- Using online communication tools to inform and educate;
- Holding information sessions and webinars, as required;
- Attending, when appropriate, Members and Supplier events;
- Facilitating Member engagement, where appropriate;
- Providing effective business relationship management;
- Managing and monitoring Supplier performance;
- Facilitating issue resolution; and
- Marketing Supplier promotions.

Schedule "D"

SAMPLE SALES REPORT



Supplier Name: OFFICE SUPPLY COMPANY
 Canoe Contract Number: CAN-2024-III
 Month: June
 Year: 2024

CANOE SUPPLIER ADMIN FEE TEMPLATE
 Monthly Submission of Data Required

Member Number	Member Name	Province	Branch (if applicable)	Date of Purchase	Transaction Date	Accounting Date	PO #	Invoice #	Item Description	Category (Parts / Labour / Service)	Item cost	Miscellaneous	Freight	Subtotal	PST	GST/HST	Total Invoice	Amount eligible for Admin Fee	Admin Fee Rate	Admin Fee to Canoe
AB1603	SAMPLE ONLY County of your County	AB	ED	3/5/2024	3/5/2024	3/5/2024	555662	9955623	Pens	Parts	5.32	-	-	5.32	-	0.27	5.59	5.32	5.00%	0.27
AMM5002	SAMPLE ONLY RM of your town	MB	WN	2/1/2024	2/25/2024	3/1/2024	TR33556	9955624	Trays	Parts	552.30	0.20	0.50	553.00	33.18	27.65	613.83	552.30	5.00%	27.62
SAR1222	SAMPLE ONLY Town of At Home	SK	RG	12/23/2023	1/31/2024	3/1/2024	202403jj	9955625	Whiteboard	Parts	1,555.20	-	20.30	1,575.50	110.29	78.78	1,764.56	1,555.20	5.00%	77.76
TOTALS											2,112.82	0.20	20.80	2,133.82	143.47	106.69	2,383.98	2,112.82	5.00%	105.64

Schedule “E”

LICENSING TERMS AND CONDITIONS