



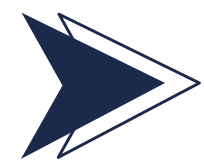
**ZOHO FOR US-BASED TRUSTED
PARTNER TO DENTAL
PROFESSIONALS**



CLIENT PROFILE



Our client is a US-based company specializing in dental products. The company partners with hospitals and dentists to supply high-quality dental products, ensuring reliable and consistent support for their clientele. With a strong presence in the healthcare sector, they are committed to delivering exceptional products that enhance dental care.



Current Landscape

Managing CRM Challenges





PROJECT BACKGROUND



Our client approached CRM Masters Infotech with the objective of replicating their existing Salesforce CRM functionalities in Zoho CRM while addressing several integration and data management challenges. They needed a solution that could seamlessly integrate their offline software, manage invoice records, and provide advanced analytics to drive business decisions. After analyzing their requirements, CRM Masters implemented a customised Zoho CRM solution customised to their unique business needs.



Region

United States

➤ Their business objectives included :

- Seamless migration from Salesforce to Zoho CRM.
- Integration with their offline software.
- Enhanced invoice management.
- Advanced analytics for business insights.



Business Type

B2B (Business to Business)



Technology We Used



Zoho CRM



Zoho Analytics



Zoho Campaigns



Deluge Scripting



Postman

CHALLENGES FACED BY OUR CLIENT



01 Replicating Salesforce CRM in Zoho CRM

Our client required an identical CRM structure in Zoho CRM, but with streamlined fields and modules to enhance usability.

02 Lack of Direct Integration with Offline Software

Client's offline software lacked native integration capabilities with Zoho CRM, requiring a custom solution.

03 Unauthorized Errors During Integration

While setting up the integration, the team encountered unauthorized errors that hindered progress.





04 Invoice Management Challenges

They needed a system to send records from Zoho CRM to their offline server and fetch both future and previous invoices for storage in Zoho CRM.

05 API Limitations

The client's API restricted the retrieval of invoices to 100 at a time, creating inefficiencies in data handling.

06 Advanced Analytics Requirements

The client needed detailed analytics reports to evaluate business performance by hospitals, doctors, and specific locations.





OUR SOLUTIONS



01 Custom Zoho CRM Development

02 Custom Integration Using Deluge

03 Error Resolution

04 Invoice Management

05 Scheduler for Invoice Retrieval

06 Advanced Analytics Implementation



1. Custom Zoho CRM Development

Built a CRM in Zoho that mirrored Salesforce's structure, removing unnecessary fields and modules to simplify navigation and improve user experience.

Deal Name	Amount	Stage	Closing Date	Account Name
Sigma Corporation	\$ 340,000.00	Qualification	05/31/2024	Sigma Corporation
Scriptorium - New York	\$ 540,000.00	Qualification	04/18/2024	Scriptorium
Commercial Press - Miami	\$ 500,000.00	Qualification	04/26/2024	Commercial Press
Maithili Inc	\$ 120,000.00	Negotiation/Review	03/17/2024	Maithili Inc
King - Mariner	\$ 230,000.00	Needs Analysis	03/17/2024	King
King	\$ 600,000.00	Identify Decision Makers	03/17/2024	King
Truhlar And Truhlar Attys	\$ 450,000.00	Identify Decision Makers	03/17/2024	Truhlar And Truhlar
Commercial Press	\$ 450,000.00	Value Proposition	03/17/2024	Commercial Press
Morlong Associates	\$ 350,000.00	Value Proposition	03/17/2024	Morlong Associates
Chapman	\$ 700,000.00	Proposal/Price Quote	03/17/2024	Chapman
Printing Dimensions	\$ 250,000.00	Value Proposition	03/17/2024	Printing Dimensions
Feltz Printing Service	\$ 450,000.00	Identify Decision Makers	03/17/2024	Feltz Printing Service
Chemel	\$ 700,000.00	Needs Analysis	03/17/2024	Chemel
Chanay	\$ 550,000.00	Identify Decision Makers	03/17/2024	Chanay
Benton	\$ 2,500,000.00	Qualification	03/17/2024	Benton

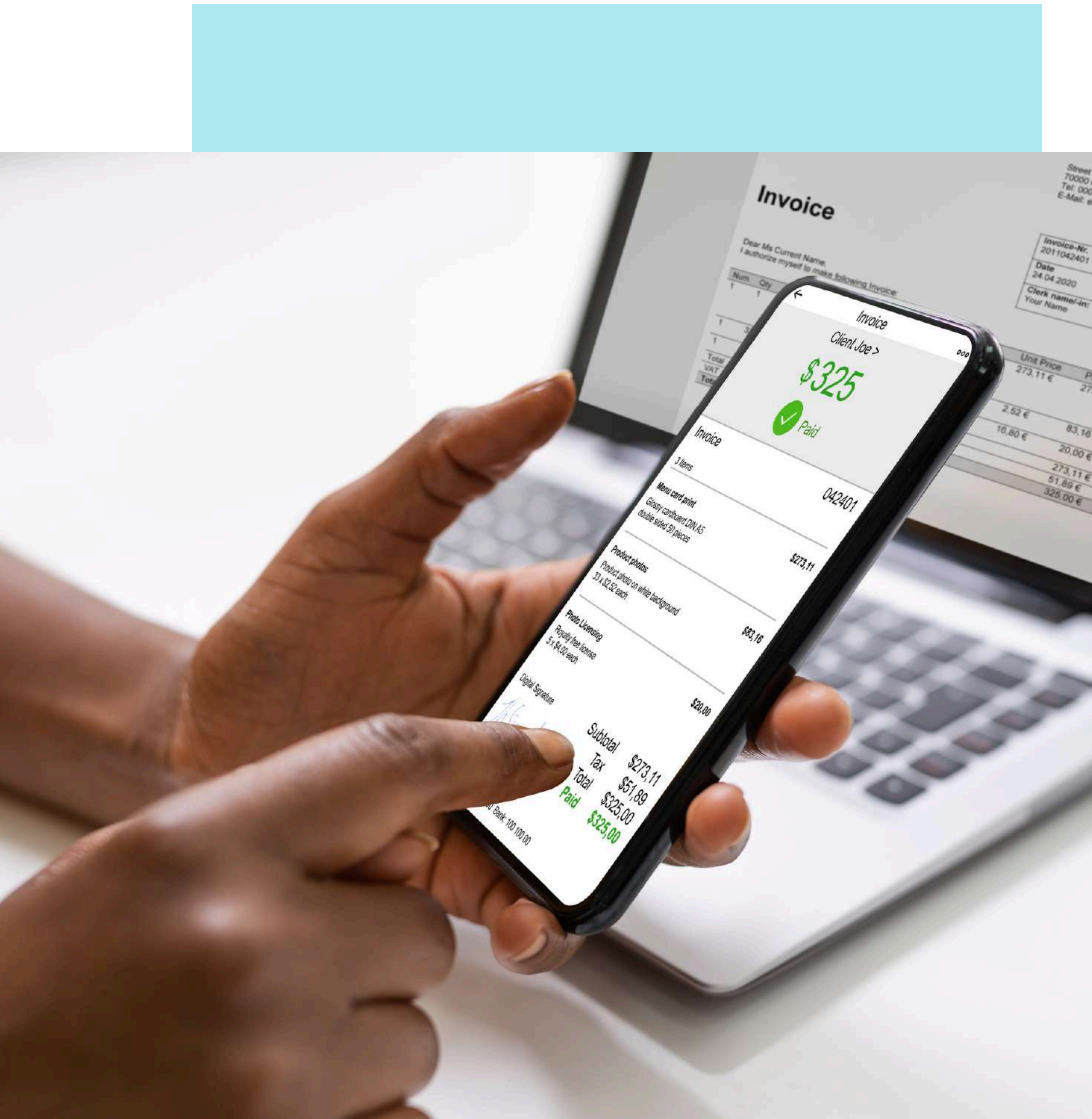
2. Custom Integration Using Deluge

Integrated the client's offline software with Zoho CRM by invoking the software's REST APIs through Deluge scripting.

3. Error Resolution

Resolved unauthorized errors during integration by modifying the approach and utilizing Postman to identify and eliminate the issue.





4. Invoice Management

Automated the process of sending records to the offline server and fetching invoices through Deluge scripting, ensuring seamless data transfer.

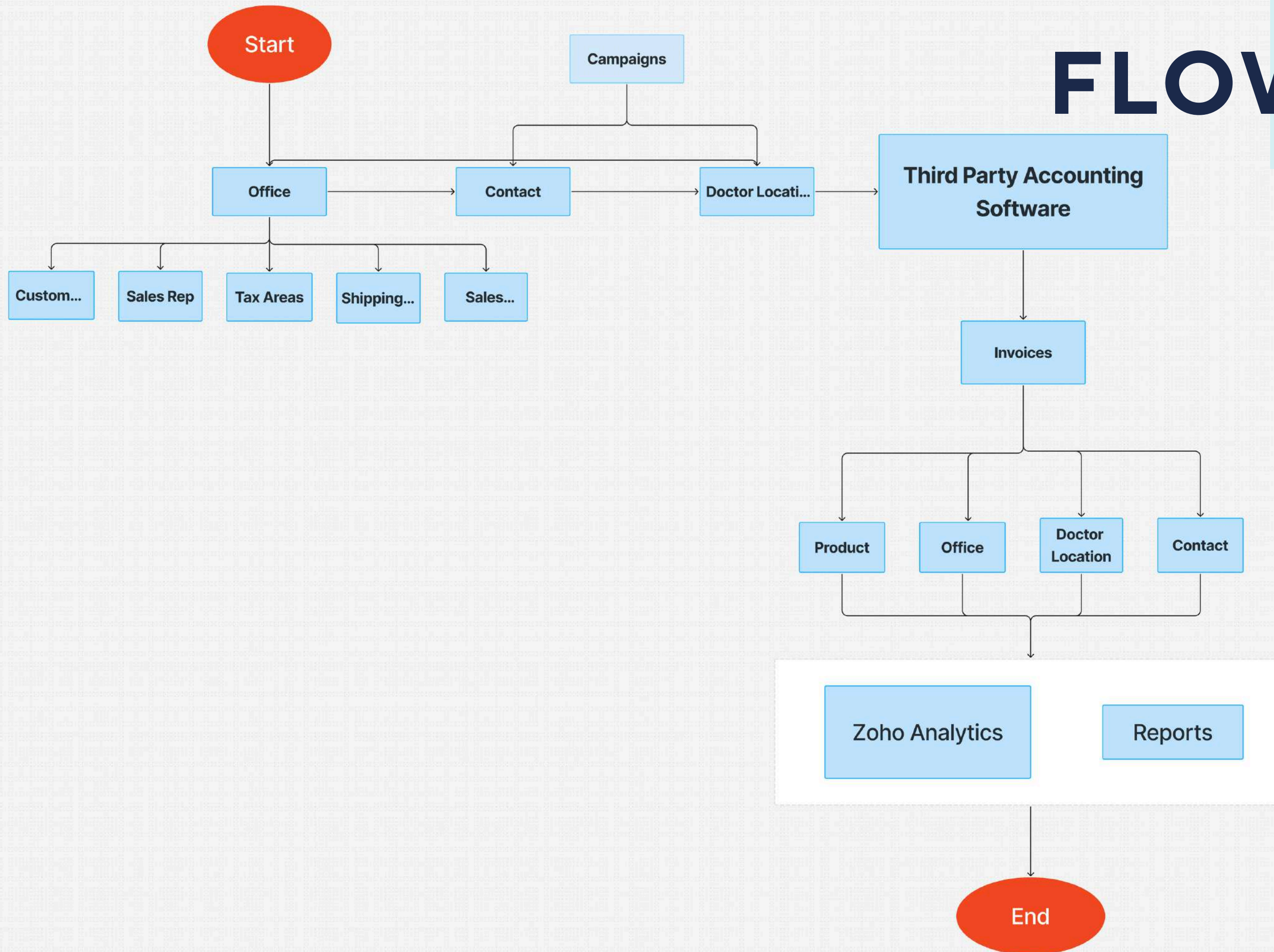
5. Scheduler for Invoice Retrieval

Created a scheduler to automatically fetch and store invoices, overcoming the API's 100-invoice limit.

6. Advanced Analytics Implementation

Developed customized analytics reports to provide insights into business performance, such as revenue by hospitals, doctors, and specific locations.

FLOW CHART





RESULTS

CRM Masters delivered an efficient, cost-effective and comprehensive solution to our client, addressing all challenges.



➤ Actionable Analytics

Delivered advanced analytics reports that provided valuable insights for strategic decision-making.

Key outcomes included :

➤ Streamlined CRM Structure

Achieved a simplified and user-friendly CRM with only the necessary fields and modules.

➤ Seamless Integration

Enabled smooth communication between Zoho CRM and the client's offline software.

➤ Error-Free Integration

Eliminated unauthorized errors during setup, ensuring uninterrupted operations.

➤ Automated Invoice Management

Simplified the process of fetching and storing invoices with automated schedulers.





Performance Improvements



95%



Reduction in manual data management efforts.



97%

customer satisfaction due to improved operational efficiency.



Enhanced decision-making capabilities through comprehensive analytics.



About CRM Masters Infotech

ENABLING GROWTH THROUGH
DIGITAL TRANSFORMATION

CRM Masters Infotech is a leading CRM consulting company with expertise in providing customized solutions for businesses worldwide. With offices in India, the UK, and the USA, we specialize in delivering innovative CRM implementations tailored to meet unique business needs. Our certified developers are committed to helping clients optimize their operations and achieve their business goals.



LET'S TALK & FIND YOUR SOLUTION



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