



Z O H O

ZOHO BOOKS INTEGRATION FOR THE REAL ESTATE INDUSTRY



CLIENT PROFILE

The real estate properties introduce the market to a flexible company that provides comprehensive and integrated real estate solutions, such as turnkey property development, property branding, advisory consulting, and exclusive developer representation for domestic and foreign markets.

➤ Current Landscape

Before partnering with us, the client worked on manual processes for their account handling, payment processing, commission handling and much more, which led to errors in their work.





PROJECT BACKGROUND

They had been experiencing rapid growth, expanding their operations into multiple regions and diversifying their real estate portfolio. As the company grew, it became increasingly difficult to manage its financial operations using its previous systems, which were fragmented and outdated. They faced issues related to invoicing, commission tracking, and bulk invoicing, which led to inefficiencies, errors, and processing delays.

The company implemented Zoho Books to streamline its accounting processes, improve reporting, and integrate its systems for more seamless operation management.



Region

Dubai, UAE



Industry We Served

Real Estate



Technology we used



Zoho Books



Salesforce

CHALLENGES FACED BY OUR CLIENT

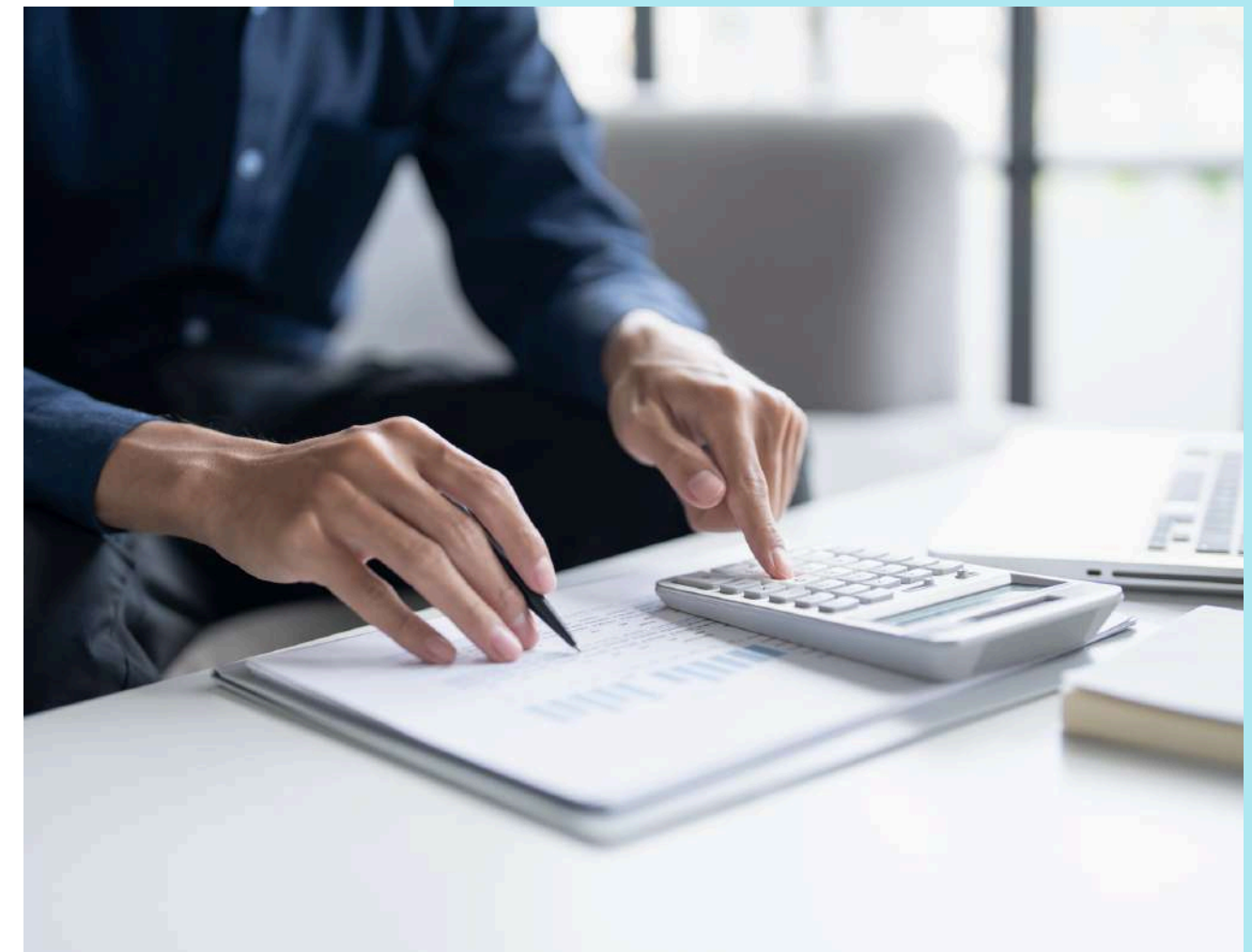


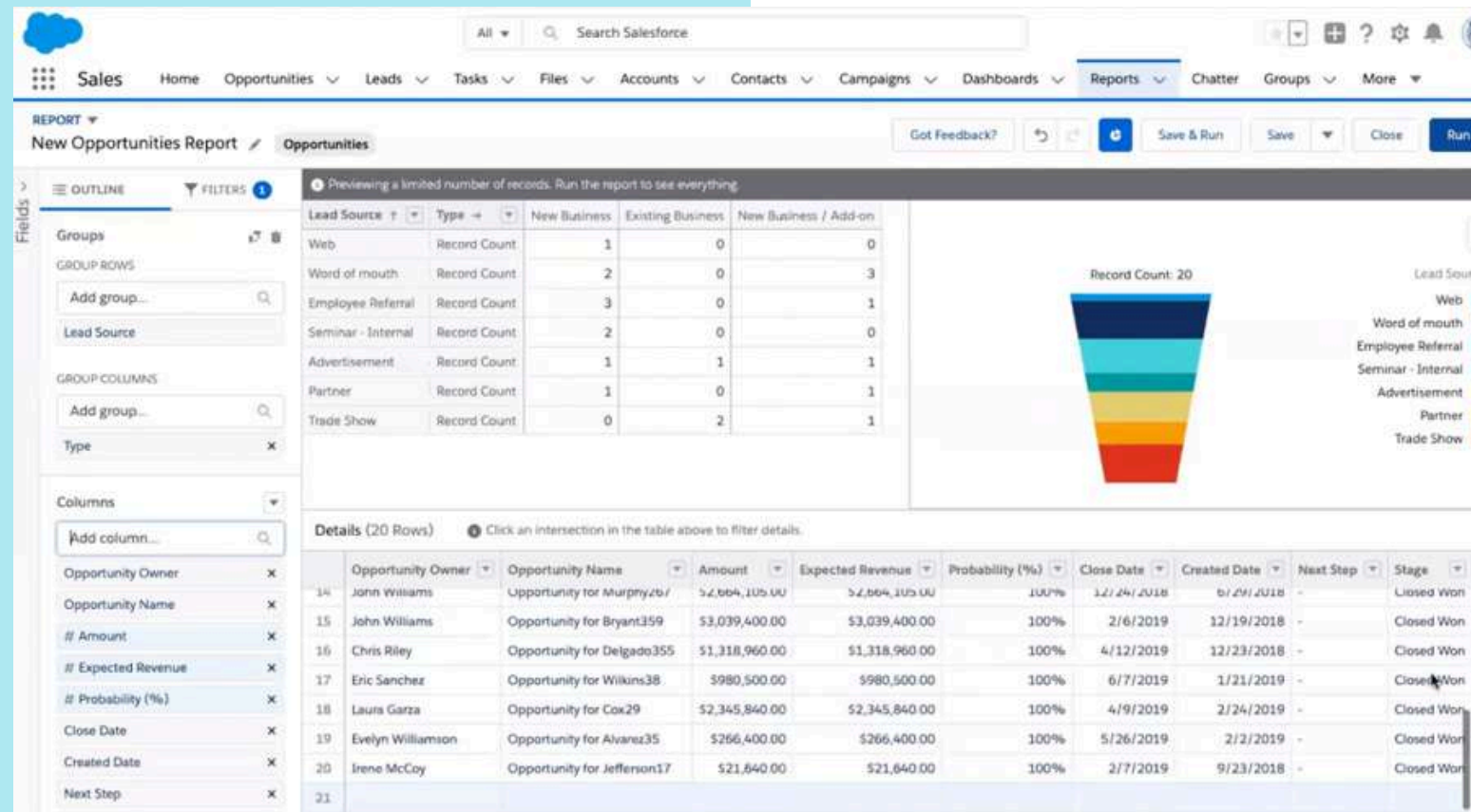
01 Commission Properly

Managing commission payments for sales agents and brokers was one of the biggest challenges. The company had a complicated commission structure based on property values and other transaction categories. Manual tracking and commission payment had a high risk of mistakes, inconsistencies, and subsequent disputes, which would cause delays.

02 Bulk Invoice unit-wise

They typically engaged in significant transactions, mainly when they sold properties in the aggregate. They need a way to produce bulk invoices quickly and organize them by unit, date, and transaction type assignment.





➤ Integration with Salesforce

The company then relied on Salesforce as its primary customer relationship management (CRM) tool to manage leads, contacts, and sales opportunities. Unfortunately, no seamless integration was established between their accounting and Salesforce software. This caused data duplication, mistakes with data entry, and other inefficiencies due to the need to enter financial data into both platforms.



➤ Inaccurate Financial Reporting

It was not easy to report and track finances, cash flow, expenses, and profitability, making it difficult to gauge the company's financial performance at a regional and business unit level. It was difficult to understand financial performance, leading to delayed decision-making and operational inefficiencies.

SOLUTION PROPOSED

To overcome these issues, we have implemented a Zoho Books solution that streamlined their finances, improved the management of their commissions, and integrated well with Salesforce.

Zoho Books Implementation

01 Invoicing

02 Accounts Payable and Receivable

03 Integration with Salesforce using PHP Extension

04 Commission Management

05 Seamless Automation

06 Custom Reporting and Dashboard

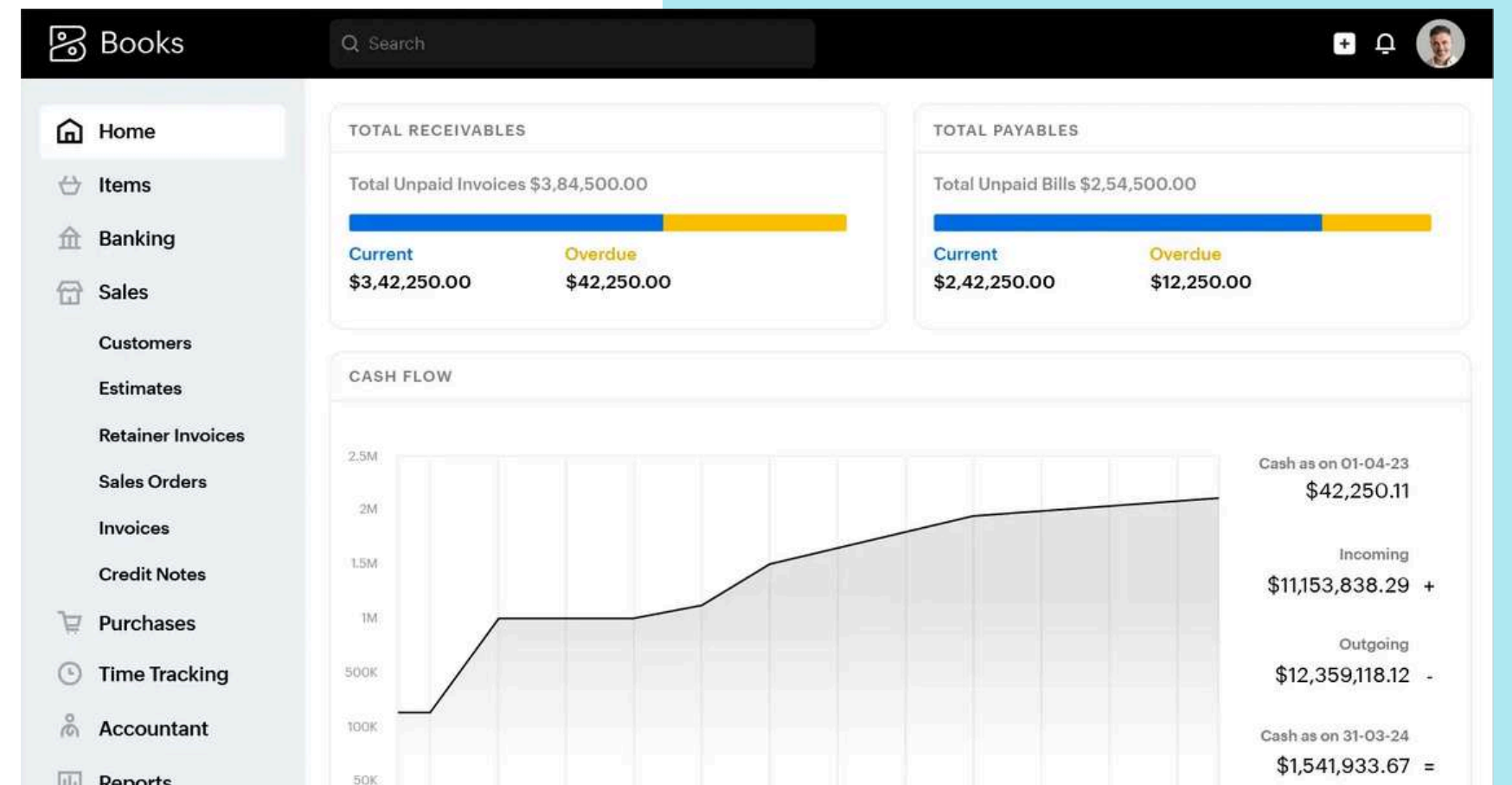
1. Invoicing

We implemented Zoho Books to handle bulk invoicing for real estate transactions. We made a custom invoice template to make it easy to create invoices for each unit sold in a big property sale. We used Zoho Books automation tools to make templates that could churn out many invoices at once without much input. This implementation made the invoicing process faster, more precise, and more productive.



2. Accounts Payable and Receivable

We implemented Zoho Books to manage accounts payable and receivable. The software automated payment reminders and scheduling, improved cash flow, and resulted in fewer late payments. Payment tracking was automated within the company's bank accounts, making it easier to track expenses. Invoices were linked to accounts, making it easier to see which invoices were unpaid and which payments were received.





3. Integration with Salesforce using PHP Extension

Zoho Books was integrated with Salesforce via a custom PHP extension. This resulted in a seamless data exchange between the CRM and accounting systems. Leads, contacts, and deals entered in Salesforce are automatically updated, resulting in Zoho Books having every financial aspect current. This created no double entry, lessened the chance for error, and provided a 360-degree view of both sales and finances.

4. Commission Management

To simplify the commission process, we developed a PHP extension for Zoho Books that would allow for accurate commission calculations and tracking. This helps our client to gain real-time, automatic commission calculation and updates.



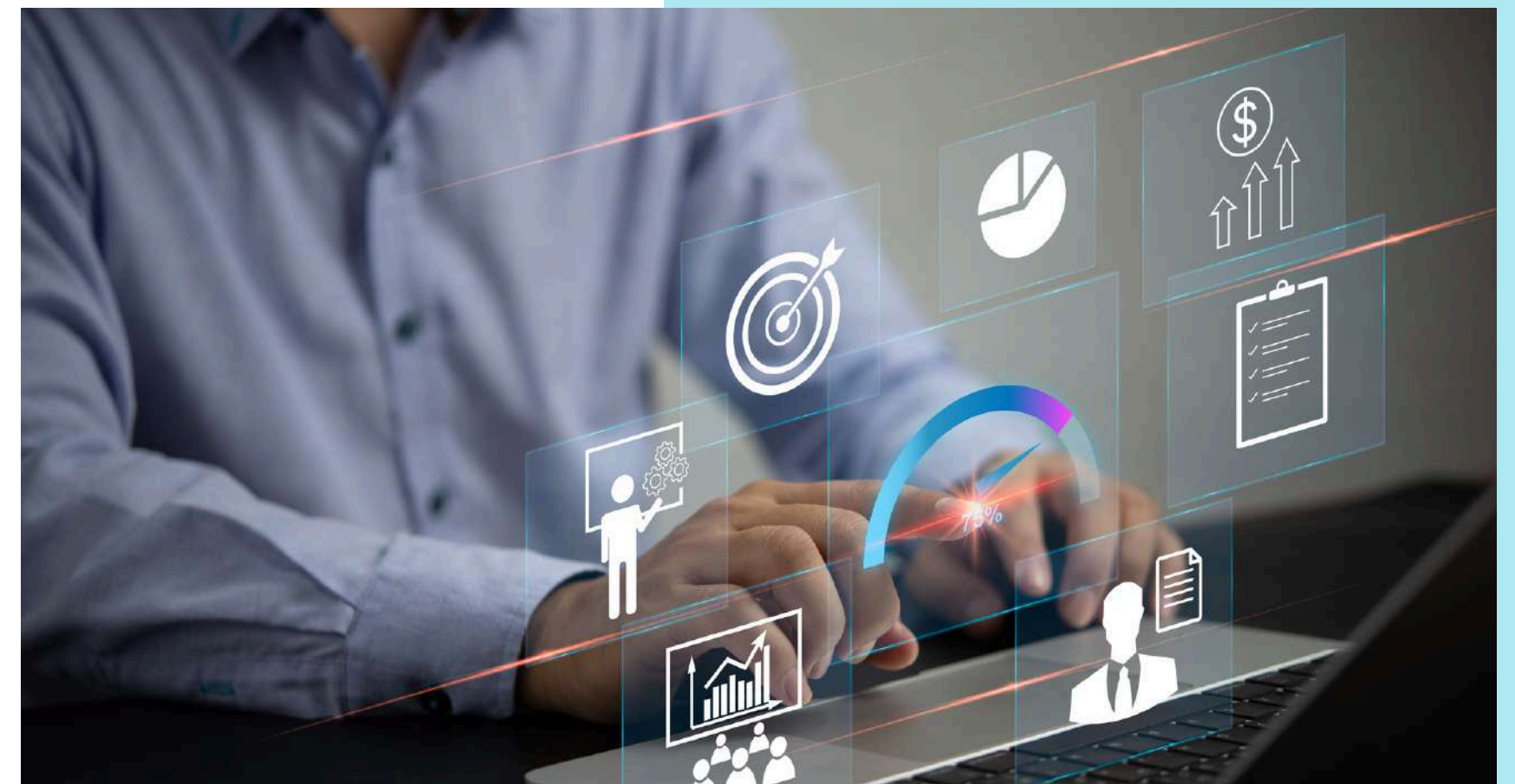
5. Seamless Automation

Within Zoho Books, we set up numerous automation rules for manual data entry while simultaneously simplifying operations. This helps our client send automated reminders of due payments, overdue invoices, and upcoming expenses to the accounting team to uphold their obligations.

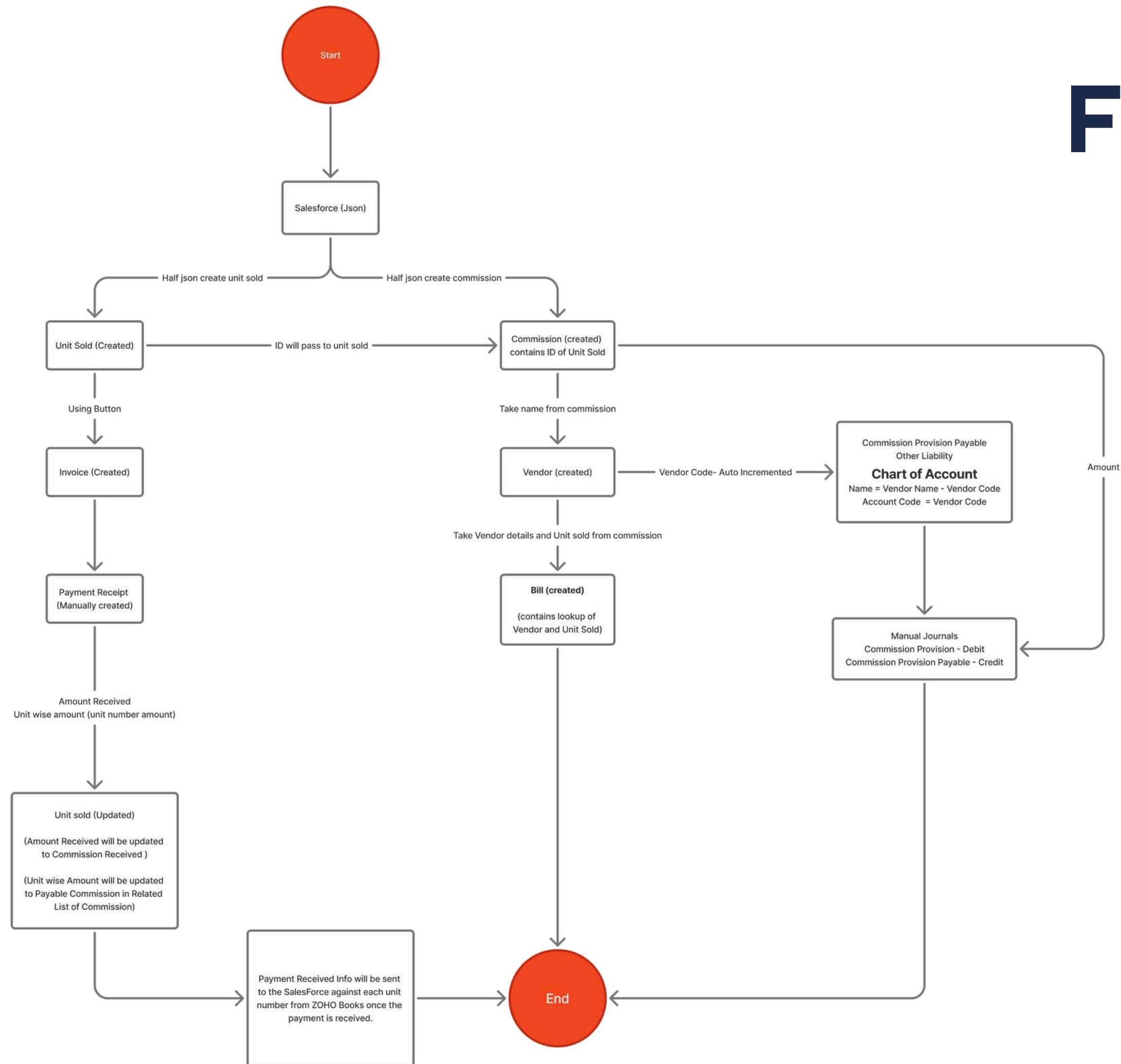


6. Custom Reporting and Dashboard

Customized financial reporting was designed to monitor KPIs for each region, project, and transaction type. Dashboards provided real-time financial information, which allowed management to be more confident in their decisions based on current information.



FLOW CHART





RESULTS



Key outcomes included :

➤ Improved Commission Accuracy

The new commission management system significantly reduced errors. Commissions were calculated automatically, saving time and preventing disputes. Sales agents could track their earnings in real-time, improving the team's morale and transparency.

➤ Efficient Bulk Invoicing

Bulk invoicing became a seamless process. The company generated invoices for hundreds of units in a single click, drastically reducing the time spent on administrative tasks and improving accuracy. This automation helped avoid delays and improved cash flow.

➤ Streamlined Accounts Payable and Receivable

The integration with Zoho Books helped streamline accounts payable and receivable. Payment reminders were automated, reducing the number of late payments and improving vendor relationships. Additionally, the system helped with faster reconciliation between bank accounts and the company's books.



➤ Seamless Salesforce Integration

The integration between Zoho Books and Salesforce allowed for a unified view of sales and financial data, minimizing the risk of data duplication and errors. The automated data flow between the CRM and accounting system improved overall operational efficiency and provided a more accurate picture of company performance.

➤ Time Savings and Automation

The time spent on manual data entry was significantly reduced, thanks to the automation of key processes. The accounting team saved over 50% of their time, allowing them to focus on strategic tasks like financial planning and analysis.

➤ Enhanced Reporting and Decision-Making

Custom reporting allowed the management team to access real-time financial data. This led to more informed decision-making and better business strategy execution. Management could quickly analyze cash flow, outstanding payments, and overall profitability by project and region.



About CRM Masters Infotech

ENABLING GROWTH THROUGH
DIGITAL TRANSFORMATION

We are a CRM consultant company focusing on Shopify eCommerce solutions. With over **8+ years of experience** and over **2050+ successful projects**, we have a proven track record of helping businesses optimize their workflows and boost growth. Our team of **100+ expert developers** specializes in delivering top-notch eCommerce platforms, CRM integrations, and tailored business solutions to meet our client's needs.



LET'S TALK & FIND YOUR SOLUTION



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