ZOHO CRM DRIVES 96% OPERATIONAL EFFICIENCY FOR US-BASED BODY CARE BRAND

ZOHO



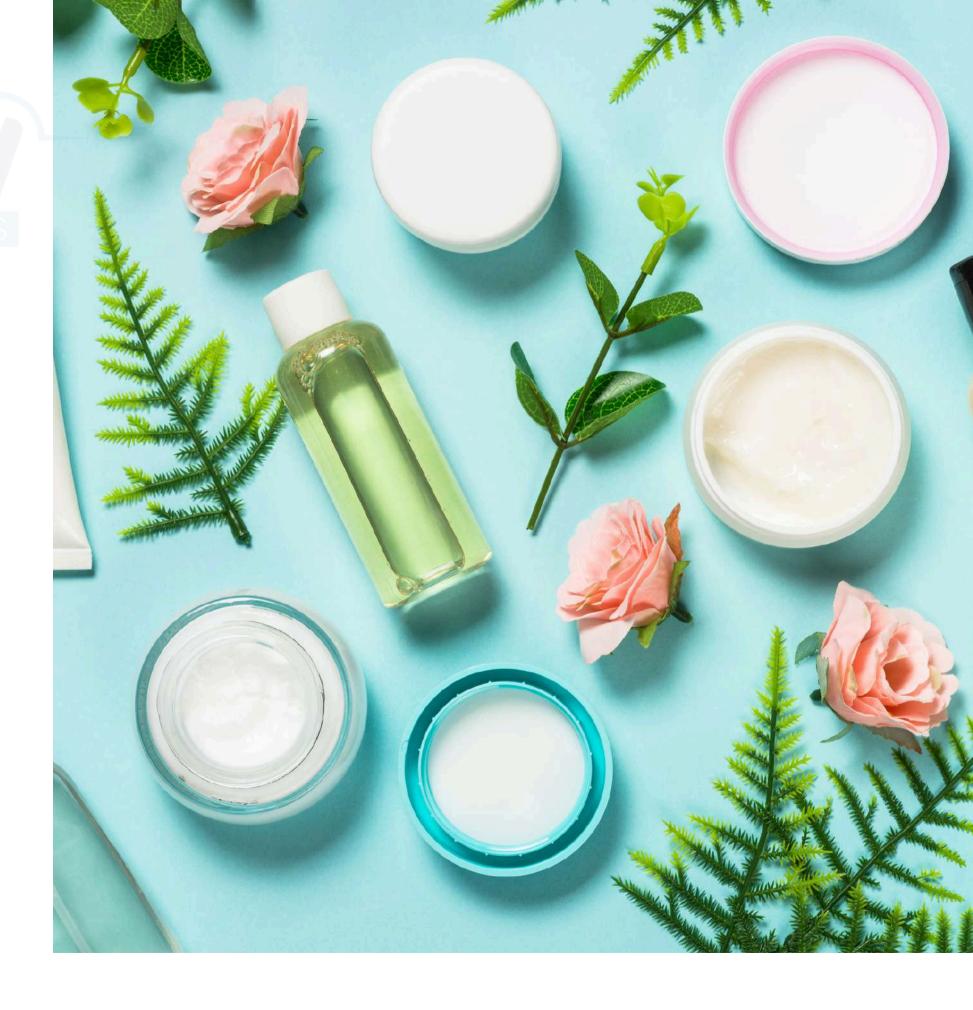


CLIENT PROFILE

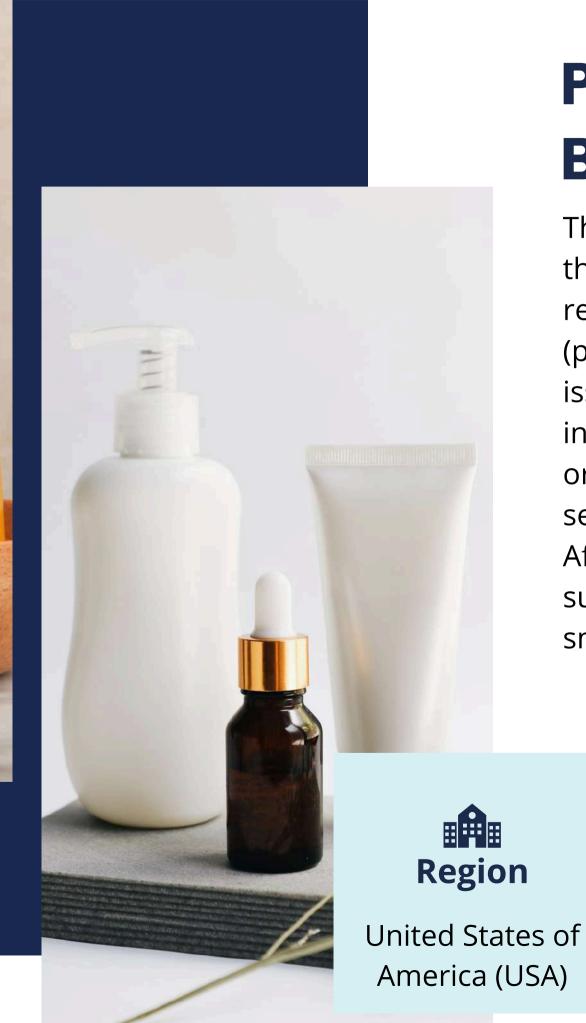
Our client is a United States-based body care brand founded by a Harvard-trained dermatologist. They are dedicated to encouraging people to take care of their hair just as much as their skin. With a focus on sensitive skin, their clinically proven and dermatologist-designed products have earned the trust of consumers across platforms like Amazon and through vendor referrals.



B2C (Business to Customer)







PROJECT BACKGROUND

The client approached CRM Masters Infotech to streamline their inventory and sales processes. Although they were receiving online orders from Amazon US and vendors (primarily dermatologists), they were facing severe syncing issues between these platforms and Zoho CRM. The inefficiencies were disrupting operations, particularly around order tracking, virtual bundle management, and subscription setups.

After working with CRM Masters, these challenges were successfully addressed, allowing their business to function smoothly with minimal disruptions.

Their business objectives included:

Region

- Maintain accurate daily reporting
- Gain 360-degree customer insights
- Manage vendor and customer-related data in one centralized system

• Efficiently manage business processes through Zoho CRM

Technology We Used Zoho CRM Zoho Inventory

Third Party Applications









Amazon US



KEY CHALLENGES FACED BY OUR CLIENT

01 Zoho Inventory Management Issues

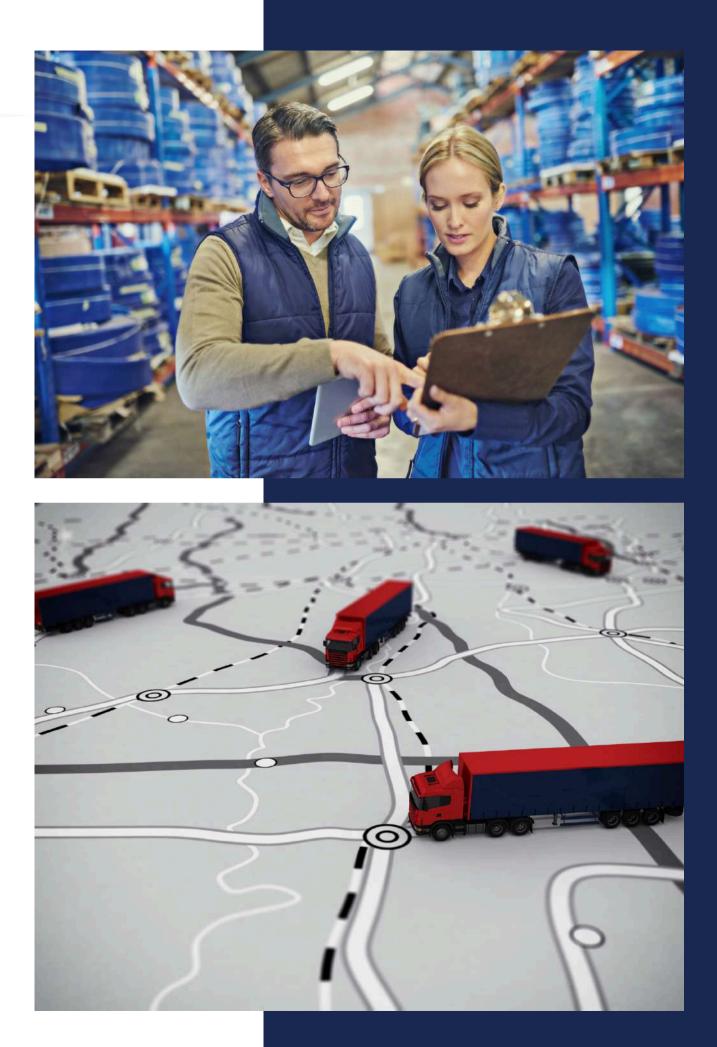
The client faced challenges aligning Amazon US and Shopify orders with their Zoho Inventory. Automating the creation of virtual bundles and managing concurrent processes in Zoho Inventory were particularly problematic due to concurrency limitations.

02 Order Tracking from Vendors

Keeping track of orders coming from their partner dermatologists proved cumbersome due to disconnected systems.

03 Subscription Sync Errors

Their subscription setup on Shopify wasn't syncing properly with Zoho Inventory, leading to failed or delayed repeat orders.



OUR SOLUTIONS

IMPLEMENTATIONS

01 Custom Zoho Inventory Sync Optimization

To address concurrency-related roadblocks in invoice and receipt creation, we introduced a synchronization delay that allowed for smoother operations.

02 Automated Order Integration from Multiple Channels

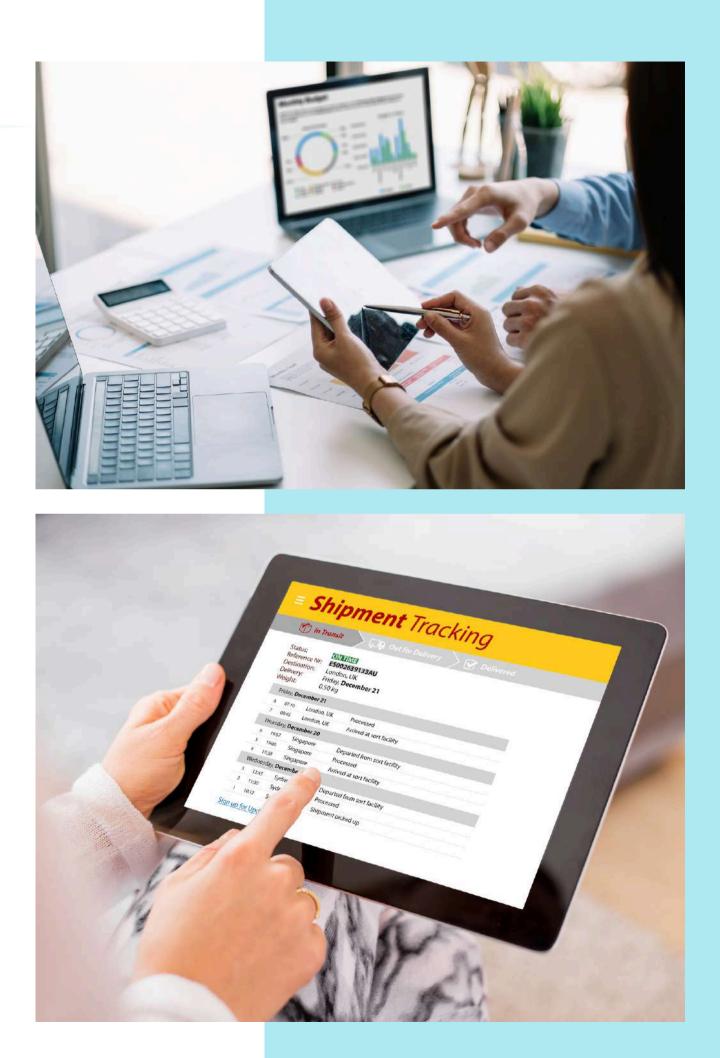
We enabled seamless synchronization of product and sales order data from Amazon US and Shopify into Zoho Inventory, eliminating manual processes.

03 Third-Party App Integration for Enhanced Reporting

We implemented third-party apps within Zoho CRM to provide comprehensive customer data and advanced reporting features.

04 Process Consolidation in Zoho CRM

The client's business processes from multiple platforms were successfully integrated into Zoho CRM, streamlining all operations under one system.



INTEGRATIONS

01	Shopify with Zoh	

02 Amazon US with Zoho Inventory

products.

03 Gorgias with Zoho CRM

Integrated customer ticketing system into CRM for centralized support.

04 Yotpo (Loyalty, SMS, Reviews) with Zoho CRM

SMS capabilities.

05 Klaviyo with Zoho CRM

Managed subscribed users and migrated existing customer data into CRM.

06 Shopify with Zoho CRM

Centralized customer, order, and product information within Zoho CRM.

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W Sales Orders +	0/08/2018	SO-00151		Patsy Carroll	CONFIRMED	u.		•	•	\$1,000.00
Packages	0 10/08/2018	SO-00150		Camille Bryant	CLOSED		•			\$1,000.00
Invoices	0 18/06/2018	SO-00148 @	1065	Nettie Lindsey	DRAFT					Rs.101.25
Purchase Orders Bills	13/06/2018	SO-00146		Calvin Gilbert	CONFIRMED					\$430.00
	14/05/2018	SO-00145		Tami Byrd	CLOSED				•	\$732.00
Integrations N Reports	11/05/2018	SO-00144		Jacqueline	DRAFT					\$732.00
ACTIVE CHANNELS	11/04/2018	SO-00143		Charlie Owens	CLOSED	U*	•	•	•	\$600.00
Shopify	11/04/2018	SO-00142		Raymond Wade	CLOSED		•			\$10.00
	05/04/2018	SO-00141		Charles Becker	CLOSED		•	•	•	\$732.00
	05/04/2018	SO-00140		Cynthia Parsons	APPROVED					\$732.00
	05/04/2018	SO-00139		Edgar Leonard	CONFIRMED		•	•	•	\$3,495.00
	05/04/2018	SO-00138		Aaron Brown	CLOSED					\$33.00

o Inventory

Enabled syncing of all orders, products, and stock details.

Allowed automatic order sync and inventory updates for Amazon

Enhanced customer experience with loyalty rewards, review systems, and



Our tailored implementation led to remarkable performance improvements and streamlined operations. These results helped the client operate with improved accuracy, greater control, and minimal manual intervention.



Key outcomes included :

Seamless order synchronization into Zoho Inventory with 95-96% process efficiency.

Achieved 95-98% accuracy in syncing Amazon US orders with Zoho Inventory.

100% Reached success integrating Shopify in subscription setup.





Improved virtual bundling automation by 90-95%.

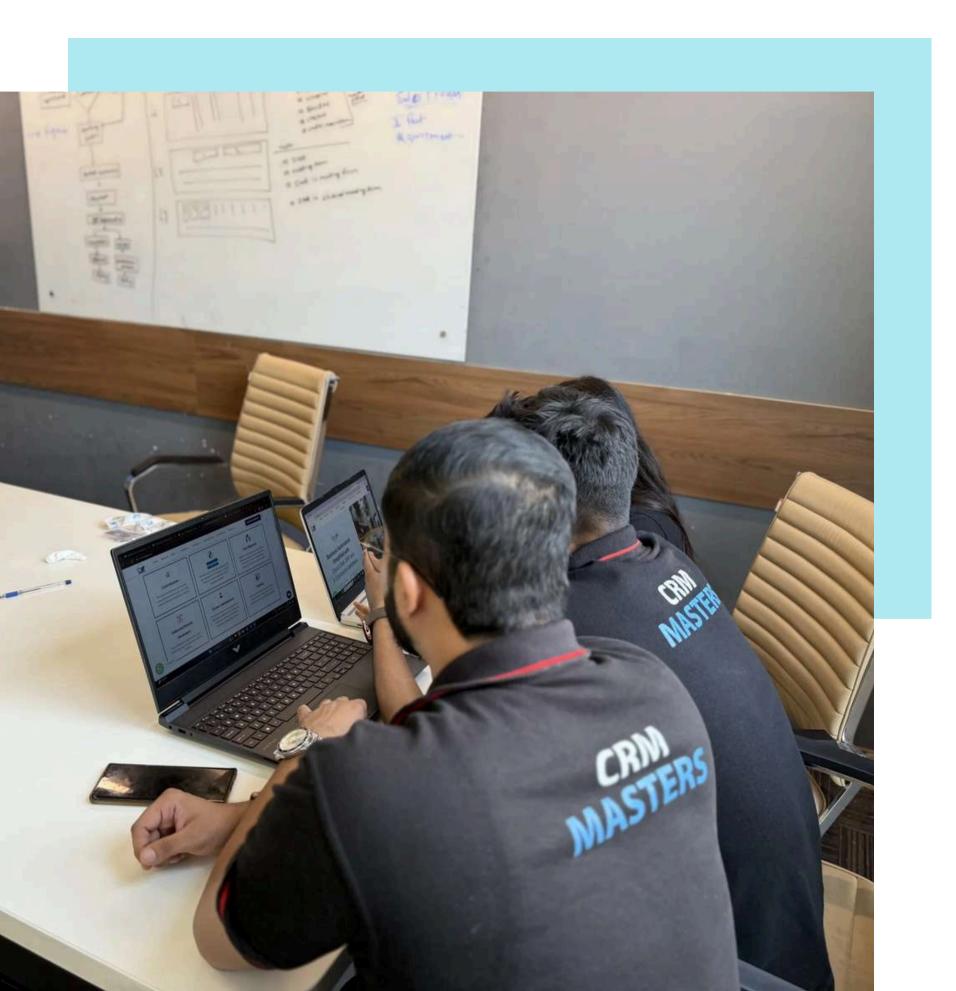
We Simplify Business Processes



About CRM Masters Infotech

CRM Masters Infotech is a trusted Zoho Premium Partner, offering tailored CRM solutions to help businesses grow and scale efficiently. With a strong focus on customization, automation, and seamless integration, our 100+ certified developers work closely with clients across industries to design systems that solve their unique operational challenges.

ENABLING GROWTH THROUGH DIGITAL TRANSFORMATION



FACING A CHALLENGE IN YOUR BUSINESS OPERATIONS? WE'RE HERE TO HELP.

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