



Z O H O

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



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.



Business Type

B2C (Business to Customer)





Region

United States of
America (USA)

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:

- Efficiently manage business processes through Zoho CRM
- Maintain accurate daily reporting
- Gain 360-degree customer insights
- Manage vendor and customer-related data in one centralized system



Technology We Used



Zoho CRM



Zoho Inventory



Shopify

amazon

Amazon US

Third Party Applications



Gorgias

yotpo.

Yotpo



Klaviyo

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

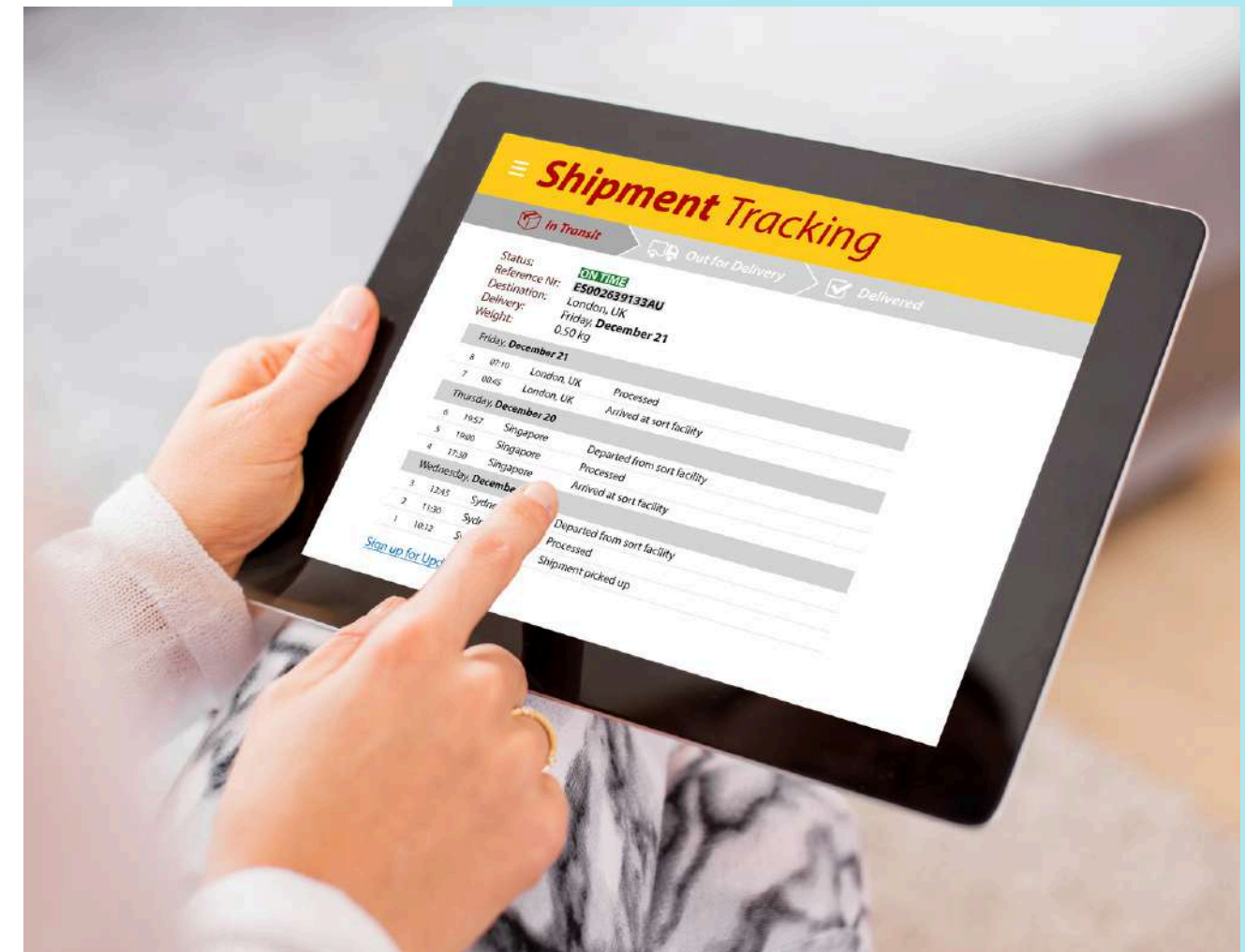
We enabled seamless synchronization of product and sales order data from Amazon US and Shopify into Zoho Inventory, eliminating manual processes.

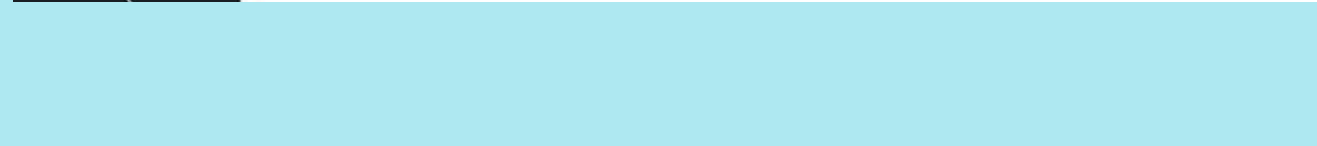
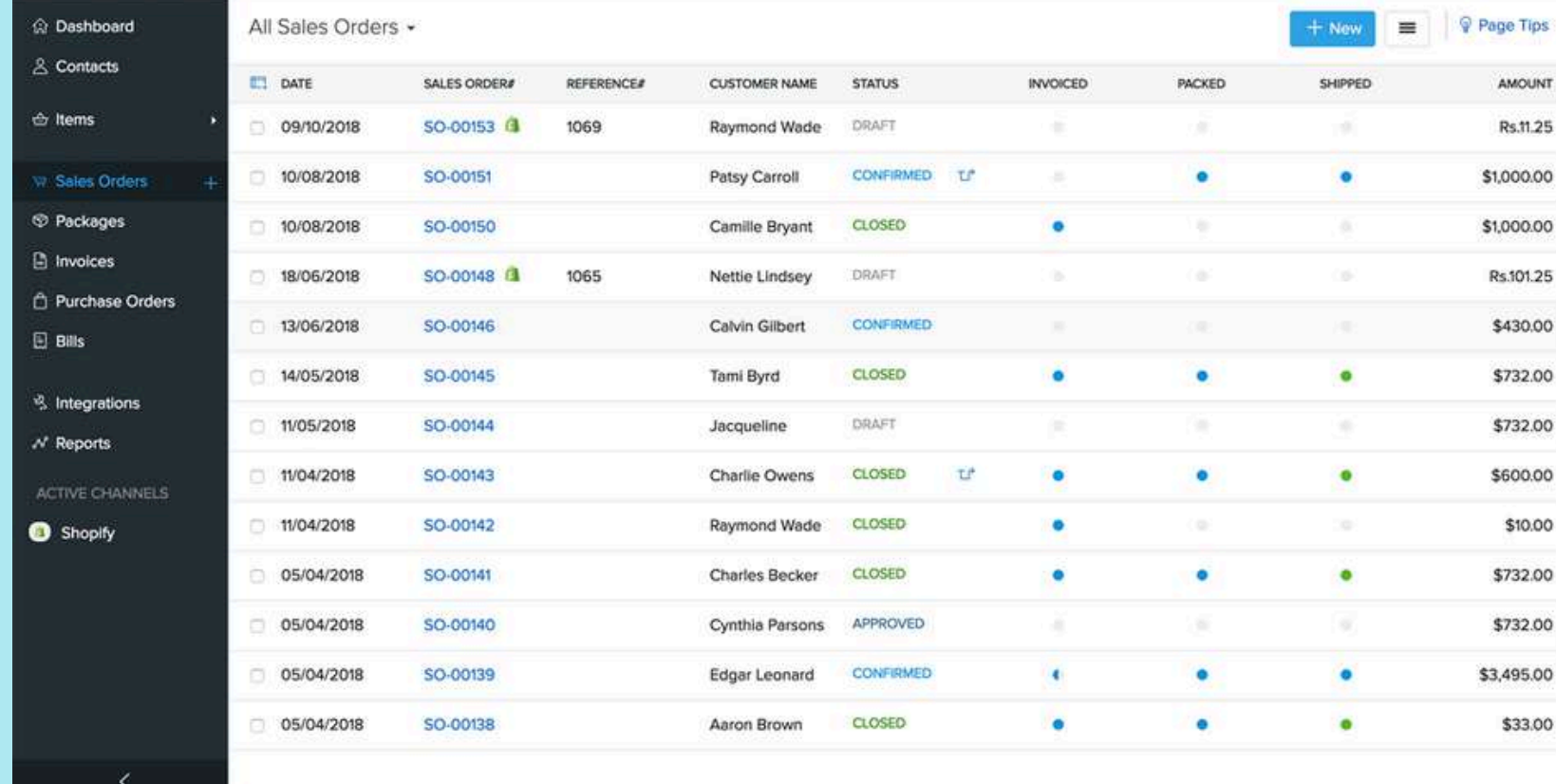
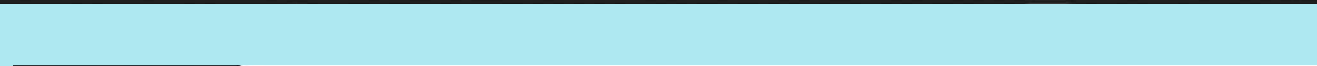
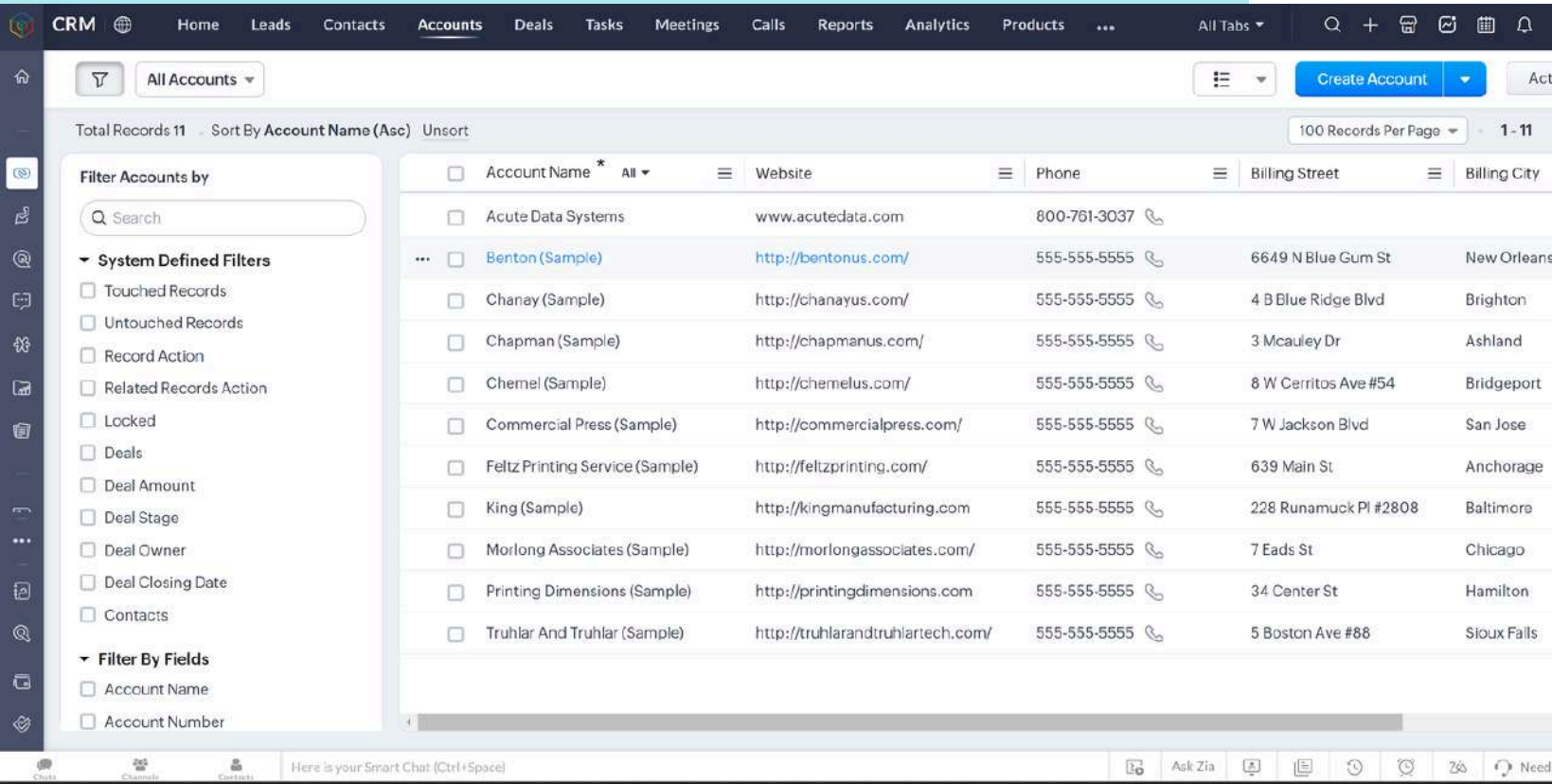
03 Third-Party App Integration for Enhanced Reporting

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 Zoho Inventory

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

02 Amazon US with Zoho Inventory

Allowed automatic order sync and inventory updates for Amazon products.

03 Gorgias with Zoho CRM

Integrated customer ticketing system into CRM for centralized support.

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

Enhanced customer experience with loyalty rewards, review systems, and 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.



RESULTS

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.
- Reached 100% success in integrating Shopify subscription setup.
- Improved virtual bundling automation by 90-95%.



About CRM Masters Infotech

ENABLING GROWTH THROUGH
DIGITAL TRANSFORMATION

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.



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



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