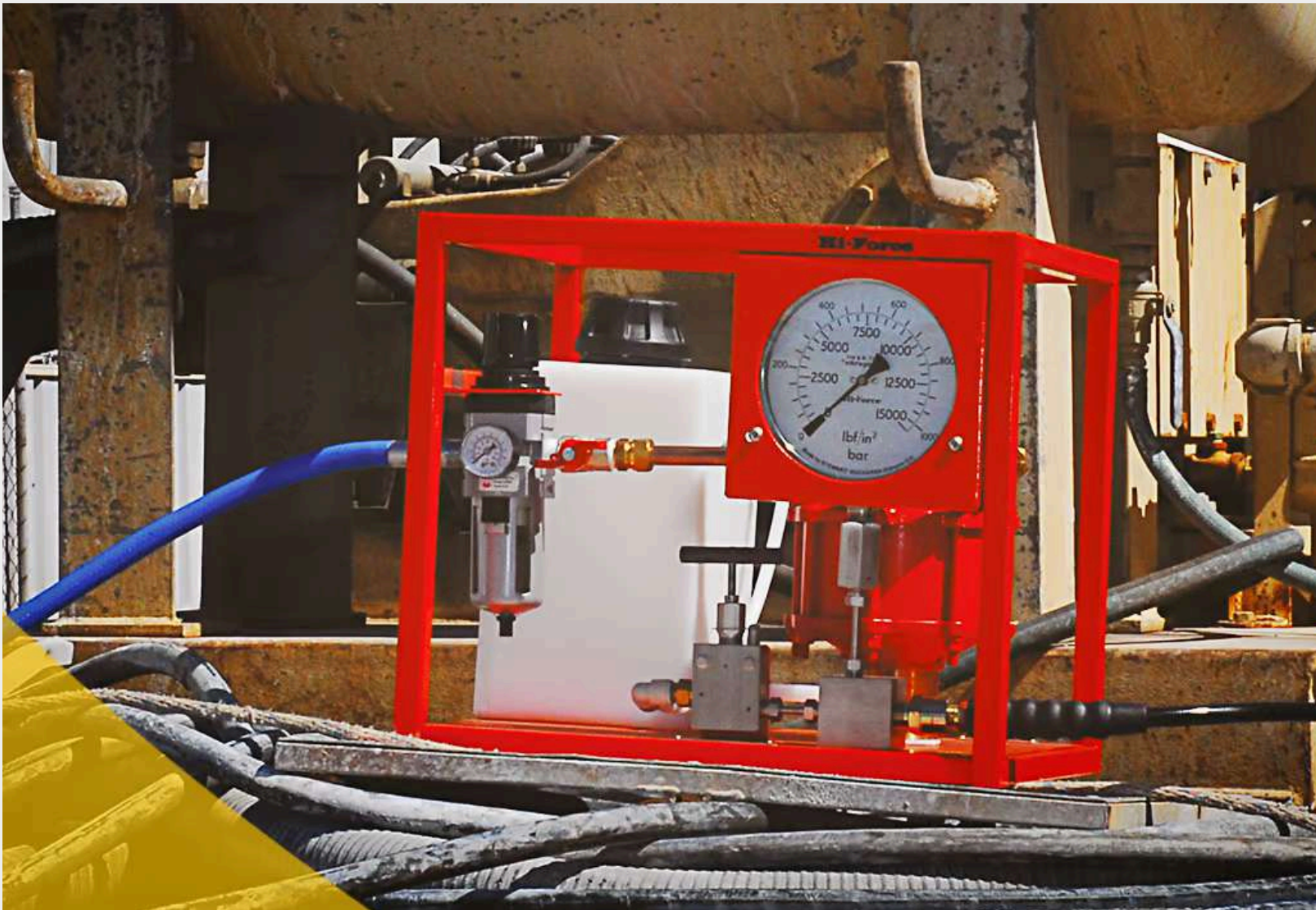




Z O H O

ZOHO IMPLEMENTATION FOR MANUFACTURING COMPANY

CLIENT PROFILE



→ Our Client sells and rents field heat-treatment equipment, consumables, and bolting tools. They also provide field machining equipment and hydraulic lifting products to the industry. The company has a long history of innovation, responsible operation, and customer service.



CURRENT LANDSCAPE



MASTERS



As the client business grows organically, the client was not using any tool other than Microsoft Excel or Google Forms to manage lead distribution among team members and track the status of the same.

CHALLENGES FACED BY OUR CLIENT



MANUAL WORK

The company used a lot of manual processes across different departments, which resulted in inefficient work, mistakes, and delays. Data entry, billing, and reporting processes were affected and susceptible to human error, which affected their overall efficiency.



ORDER MANAGEMENT

The company had issues with inconsistent order management systems, which led to discrepancies in orders, late processing, and problems tracking order status. The lack of integration between the sales, production, and fulfilment processes has a negative impact on order fulfilment and customer experience.



PRODUCT MANAGEMENT

The lack of a unified product management system makes it challenging to keep track of product information and updates, and negatively impacts order fulfillment.



STOCK MANAGEMENT

Inefficient stock management processes led to inventory inaccuracies and stockouts, which led to an impact on their customer service.

Project Scope

The company has a long history of innovation, responsible operation, and customer service. However, it is facing challenges in its work. Manual work in its industry has held it back and increased the risk of operational incidents.



**Software Tools
Proposed**



Manufacturing

**Industry We
Served**



Canada

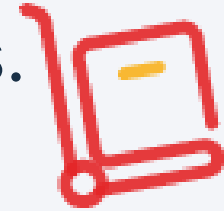
Region



SOLUTION PROPOSED

IMPLEMENTATION

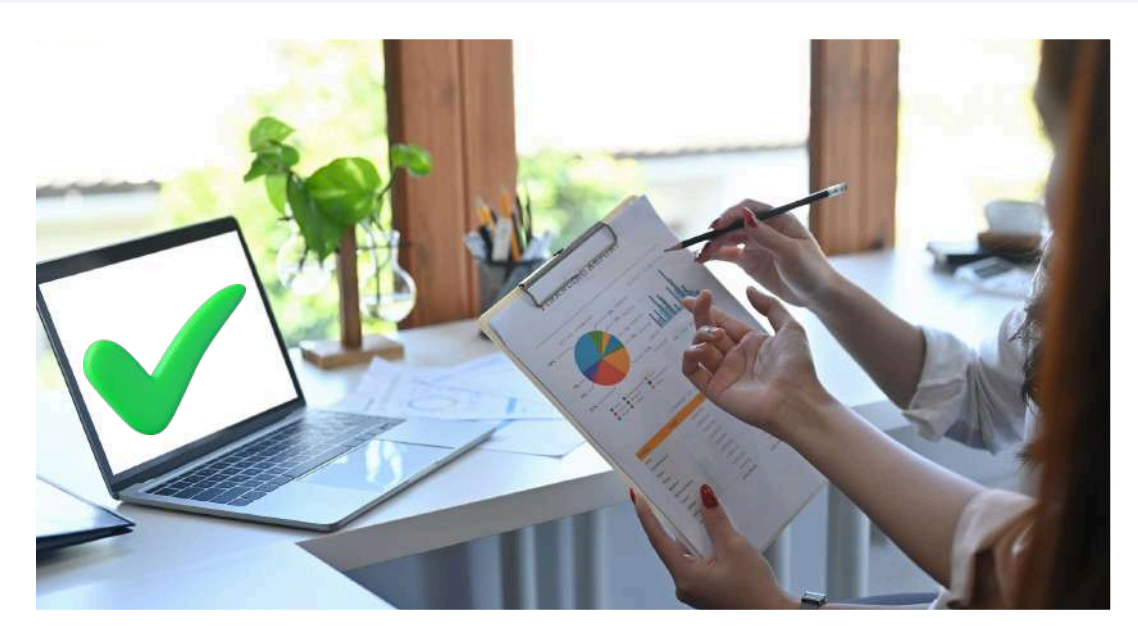
Our company implemented the **Zoho Inventory** to focus on product and stock management. We tailored the platform to their needs, centralising product, information, pricing and availability and **streamlined inventory management** processes.



Zoho Books simplifies their accounting operations, automates invoicing and helps them manage financial transactions efficiently. We set Zoho Books up to meet their accounting needs.



We understand their sales process, customized the platform according to their requirements and integrated **Zoho CRM** with existing systems. This streamlined **lead management**, tracking and **customer engagement** effectively.



INTEGRATION

ZOHO Books+ZOHO CRM+ZOHO Inventory

We have integrated **Zoho Books**, **Zoho CRM** and **Zoho Inventory** to establish a seamless data exchange and optimise operational workflows. As CRM modules not directly connecting for invoicing and purchase orders. So, we utilized Zoho Books Inventory templates and created custom templates with HTML fields and layouts. This allowed seamless integration with Zoho CRM, ensuring smooth data flow between systems. Also, custom functions were developed in Zoho Books to analyze **profitability** and **margins**.



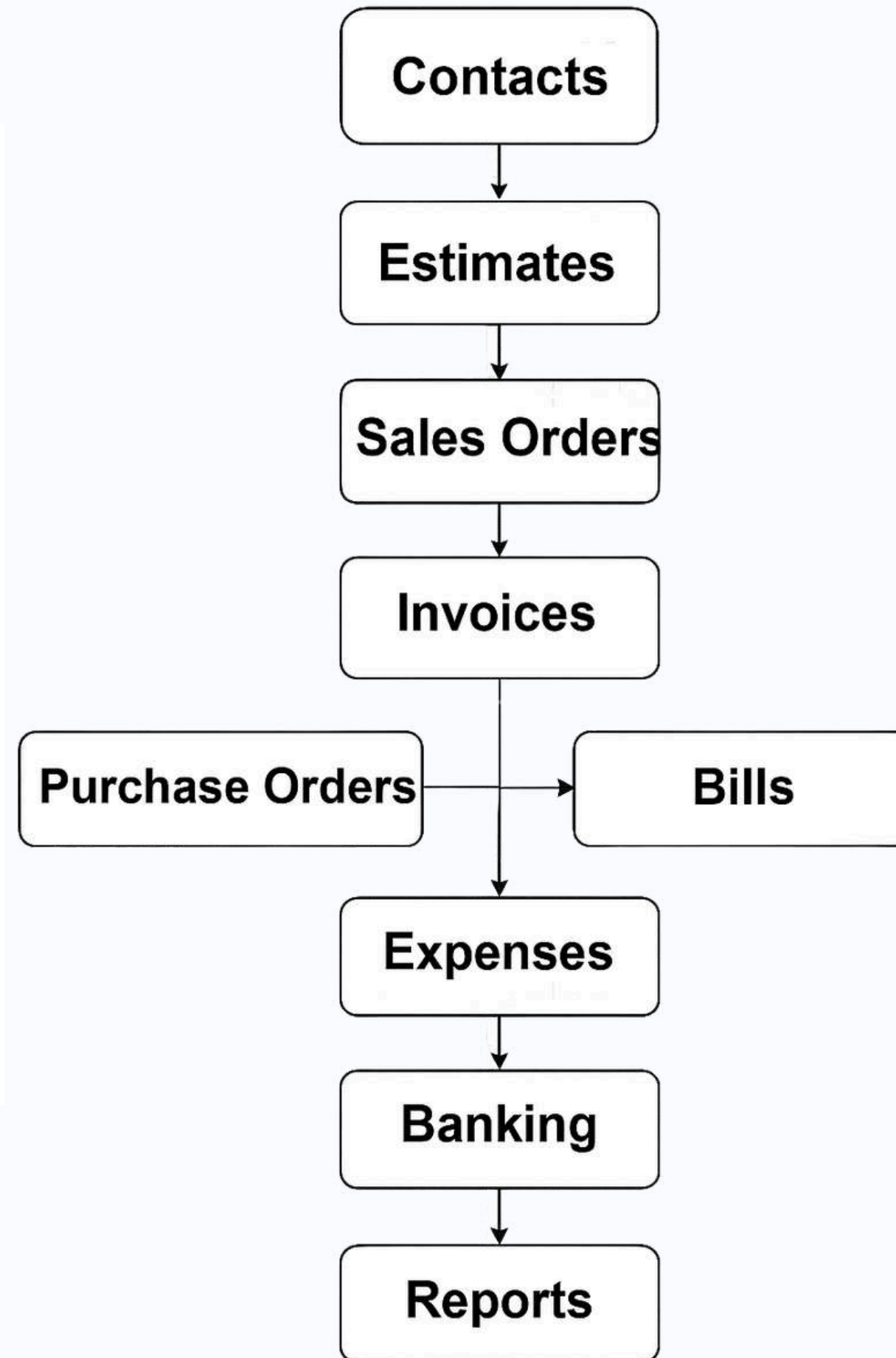
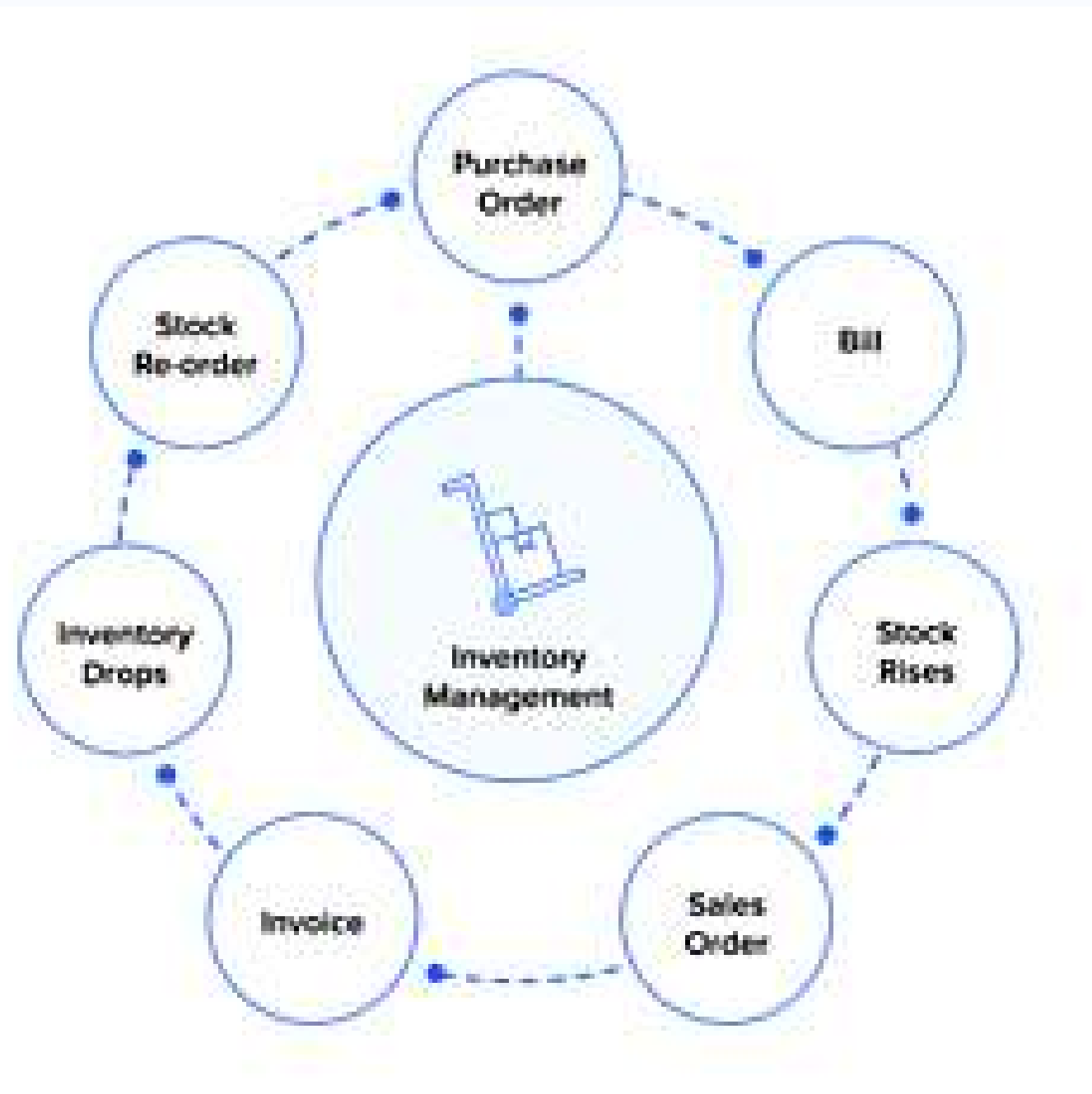
INTEGRATION

Payment Gateway Integration with Stripe + Zoho Books

By integrating **Stripe** with **Zoho Books** for them, we aimed to streamline invoicing and payment processing. Once invoices were generated, clients received them with a secure payment link powered by Stripe. This allowed for convenient and secure payments directly from the invoice. Payment status updates were synchronized in real-time between Zoho Books and Stripe, reducing manual effort and errors. This integration **accelerated cash flow, improved financial transparency**, and enhanced the **customer experience**.

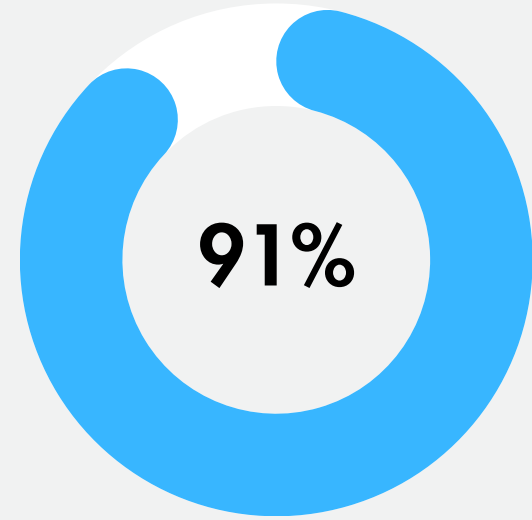


FLOW DIAGRAM



RESULTS

These key performance indicators help evaluate the company's performance across various areas, guiding decision-making and driving continuous improvement efforts.



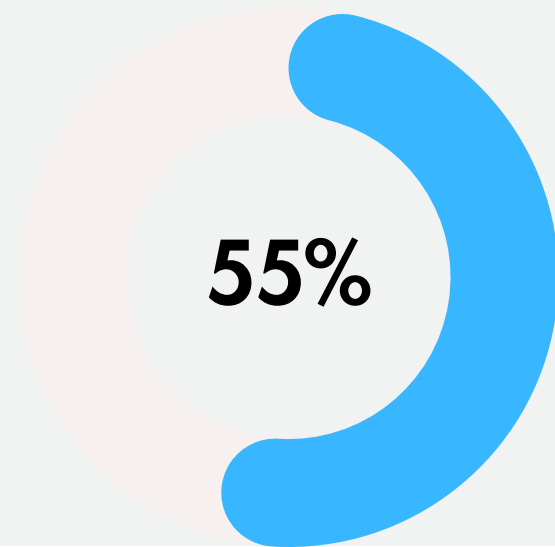
**Improvement in
Product Management**



**Increase in
Conversion Rates**



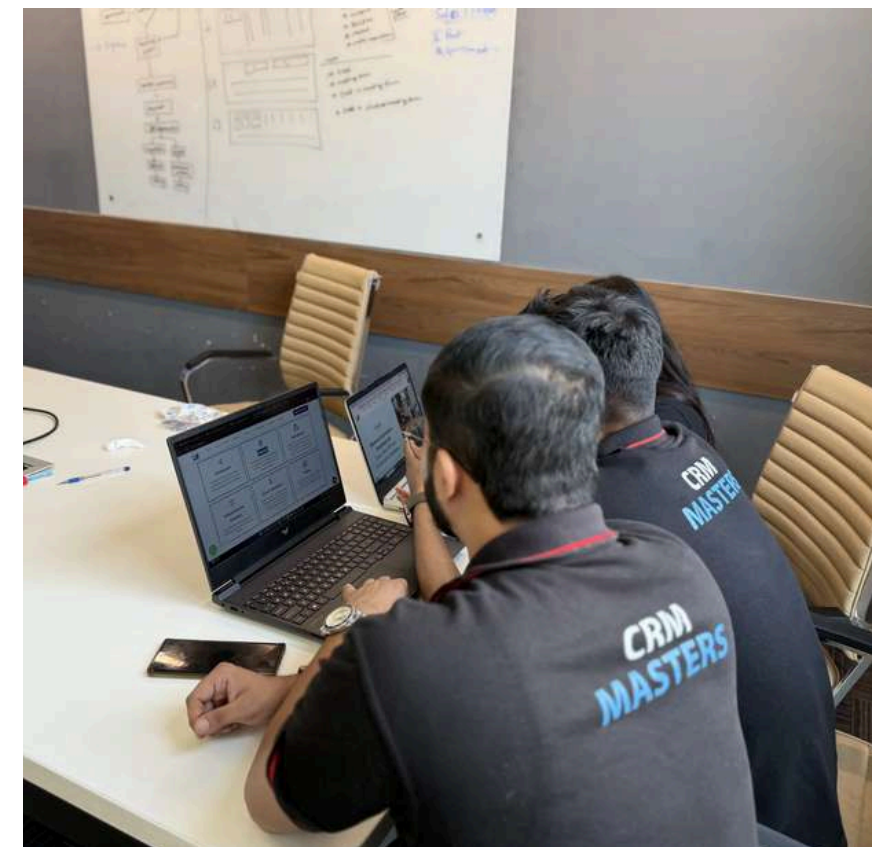
**Reduced Manual
Data Entry**



**Increase in Stock
Control**

Our Portfolio

We are a **CRM consultant company** with over 9 years of experience and over **2,050+** successful projects, We have a proven track record of helping businesses optimise 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 clients needs.



LET'S TALK & FIND YOUR SOLUTION



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