

Leading Building Material Suppliers

## Zoho CRM & Zoho Creator

● **Project Duration:** 4 Months

● **Users:** 8

● **Project Scope:**

Their primary focus is on establishing a software system and a process structure to manage their business process and measure performance for their organizational functions. A system that would automate their Sales function, Quotation Development and enhance automation using a Custom Application.



## Problem Descriptions

The Customer was looking for transitioning from manual methods of managing costing, estimation, leads, inventory, and forecasting using Excel to modern, automated processes. They require a system to optimize their operations with better accuracy and security, allowing them to manage their resources efficiently and make better decisions.

## Solution Approach

We have implemented a Costing and Estimation management system using Zoho Creator. This system has been designed to simplify their existing costing and estimation processes and increase efficiency. It also enables them to track cost and estimation activities and provides them with increased transparency. Zoho CRM will help the organization streamline their customer and lead management activities, increasing their productivity, and improving overall sales performance. We have implemented a Purchase and Inventory solution to handle all the activities related to purchase orders and sale orders. This solution is powered by Zoho Books. This can streamline the entire purchasing and inventory process and will be able to monitor and track all the activities related to purchase orders as well as sale orders.

## Customer Experience

We have documented the functional requirement based on multiple iterations of requirement gathering with clients to ensure an appropriate customized solution. The product built is highly efficient for the customer to manage all their business activities. The shift in technology from Excel has helped the Organization to save time and resources in managing their business.

## Outcome

Effective implementation of the solution has enabled the organization to interact with leads, opportunities and track their expectations on time to effectively capture the transition of prospects in the pre-defined stages of the sales process and receive system-generated alerts to ensure timely follow-ups.

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