

# Geophysical, Geological, and Geotechnical Engineering & Consultancy Services.

## Zoho CRM

● **Project Duration:** 4 Month

● **Users:** 8

● **Project Scope:**

The Implementation scope for the customer was focused on developing a software solution to monitor the data tracking and to streamline employee expense tracking. Multiple functions were implemented using Zoho applications. The aim is to establish improved data visibility & security through proper data permission and profile management.

## Problem Descriptions

The customer was using manual methods to monitor all their employee expense tracking and they were looking for an Accounting software system that could help them streamline all the expenses related to the employees. Additionally, they required software to handle tasks related to Purchase Orders, Sale Orders, Budgeting reports, Profit and Loss reports, and generating invoices.

## Solution Approach

We implemented Zoho Books to streamline all activities related to accounting for the customer. We have integrated an appropriate solution process based on the various business requirements outlined by the client.

Multiple functions such as Customer Master, Purchase order, Sale Order, Vendor Management, Company Expense tracking, Employee expense tracking, Budgeting Analysis Reports, Journal Management, and Reports related to profit and loss were created to make the process of accounting efficient.

We have also assisted the organization in migrating data from QuickBooks to Zoho Books, thus allowing them to carry on their business operations with minimal disruption.

## Customer Experience

The customer had a hassle-free experience in implementing Zoho's applications. They are pleased with the product built, as it is efficient for managing employee expense tracking and all the activities related to accounting. Various challenges related to data migration were managed adequately to help the organization operate without interruption.

## Outcome

The customer is now able to track and manage all the tasks related to financials more accurately and with greater ease. Implementing Zoho's applications has established greater collaboration between team members through effective workflow alerts.

Integrating automation features like payment reminders, scheduling reports and setting triggers for certain workflows has helped them save time on tedious work and focus on prioritized work.

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