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Zoho Creator

● **Project Duration:** 2 Months

● **Users:** 3

● **Project Scope:**

Implementation of Zoho Creator to build a custom Contract Management Application.

Problem Descriptions

The client required a software application to streamline the creation, tracking, and management of customer contracts. Additionally, they needed a tool capable of accurately computing raw material consumption, material costs, and steel production tied to these materials. They captured customer contracts and raw material consumption data using SAP and SAR Plus. The desired software solution should seamlessly extract data from these existing tools and perform the necessary calculations to fulfill these requirements, enhancing efficiency and data accuracy.

Solution Approach

A comprehensive solution approach was built using Zoho Creator, beginning with an in-depth requirement-gathering phase to understand the client's specific needs. Following this, we created detailed use cases and wireframes to visualize the system's functionality. Once the client approved the wireframes, we moved on to the development phase, configuring the following modules to address the client's requirements: All the data related to Materials, Customers, Pricelists, Cost Factors, Units of Materials etc. was captured from SAP and SAR+ in the master Modules so that these data can be flown to the required modules to get the outcome. Contract Configurator: This module was designed for configuring contract types. Customer has various types of contracts and each contract has a formula to calculate Contract Payable cost. Price List: This module stores data related to materials which is extracted from SAP by integrating it with the Contract Management application to calculate the consumption cost after applying the cost factor which is calculated every month. Order Confirmation: It Captures customer orders for material consumption tracking. Inventory: It facilitates VMI (Vendor Managed Inventory) data tracking. Warehouse Master: This module manages material inward tracking from SAR+. Production Master: To track day-wise production. Material Consumption Module: It records day-wise material consumption. Invoice Master: To generate customer invoices based on consumptions. Credit Notes Master: Handled invoice cancellations for purchase returns. Workflow Automation was set up for various modules using specific formulas. We also built comprehensive reports and dashboards, offering insights and performance metrics related to production, material consumption, and billing.

Customer Experience

The client expressed satisfaction with the project results, which were delivered within the designated timeframe.

Outcome

The Contract Management System built for the customer has streamlined and enhanced the management of contracts throughout their lifecycle. The application has facilitated the efficient creation, tracking and monitoring of contracts, ensuring compliance with legal requirements and has maximized the value derived from contractual agreements.

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