

CASE STUDY

ZOHO FOR A REAL ESTATE INDUSTRY

COMPANY LOCATION



Gurgaon,
Haryana

INDUSTRY



Real Estate

APPLICATION REPLACED



Microsoft Office, Excel

ZOHO PRODUCTS (ZOHO ONE):



Modules: Zoho People, Zoho Payroll, Zoho Books, Zoho Analytics, Zoho CRM, Zoho Project, Zoho Desk, Zoho Creator

THE CHALLENGES

The Company uses a Legacy System to manage its Accounting and HR Operations, and for year-end accounting that an accountant oversaw. The team was finding it difficult to find their monthly or quarterly numbers, profit and loss, or revenue, as the systems were not integrated and they did not have access to any of this information. Also, the HR department found it difficult to manage their operations, to track employee data and their payroll using Microsoft Excel.

The company was also looking for a modern approach to gathering customer information, aiming to move away from traditional methods like Excel spreadsheets and written notes. Their primary goal was to develop a comprehensive application that could not only acquire customers and leads but also serve as the core platform for their entire business operations. Also they were looking unified project management tool along with ticketing system to manage their client support queries



OVERVIEW

- Legacy system to manage Accounting and HR Operations.
- Using spreadsheets to gather customer information and sales orders.
- Lack of real-time data availability when required.
- Absence of centralized system and advanced reports.
- Absence of project management and customer support queries ticketing system.

THE SOLUTIONS

They reviewed numerous solutions and found that the Zoho One is the best fit as per their requirements. Zoho People, Zoho Books, and Zoho Payroll, including Zoho CRM and Zoho Analytics, had a considerable advantage regarding a centralized system, user-friendly interface, and integration ability.

Today, they implemented all the Zoho People and Zoho Payroll features, from database management to exit management. and with all employees' direct salary deposit through partner banks, employee self-service (ESS) portal, to Form-16 generation Incuspaze now seamlessly manages a workforce of all employees with just a small HR team. They've been able to streamline end-to-end HR management to Payroll Operations using Zoho People and Zoho Payroll.

By using Zoho Books, they can obtain financial statements instantly rather than waiting for their accountants to enter everything into their legacy accounting system thus reducing their workload. The team was relieved of the need to crunch data in Excel and wait one to two months for the information to become available. The team was able to create their dashboard after switching to Zoho Books by utilizing the advanced reporting and the connectivity with Zoho Analytics.

Zoho CRM plays a very crucial role in their organization. With the Zoho CRM features and functionality, the company gets relief from Spreadsheets and Excel to maintain and track their Customers, Leads, and Sales data. Using Zoho CRM they are now able to manage their entire business operations.

- Seamlessly manage all their HR and Payroll Operations using Zoho People and Zoho Payroll
- Real-time data is easily available and can also obtain financial statements instantly using Zoho Books.
- Zoho CRM is there to manage their entire business operations, customers, and sales records in one place.
- Advanced reporting and real-time data analysis using Zoho Analytics
- Zoho Projects simplifies their project management with its features like task automation, collaboration, and time tracking, ensuring teams stay productive and on schedule.
- Zoho Desk enhances its customer support with AI-powered automation, multichannel ticketing, and insightful analytics for improved resolution times.
- Using Zoho Creator they can build custom applications quickly with its low-code platform.