



RETAIL

ZOHO ONE SUITE

WHITE PAPER ON IMPLEMENTATION
IN RETAIL INDUSTRY

From
Devi Sambamoorthy
FOUNDER & DIRECTOR

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Introduction

NurtureU Technologies has implemented the Zoho One suite of products successfully. We provide maintenance and support that makes the success enduring. The white paper talks about the application of certain unique features that are part of Zoho One suite of products.

1. Zoho Analytics: The combined power of Zoho Analytics and Zoho Books
2. Zoho Campaigns Success Story
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Zoho Analytics: The combined power of Zoho Analytics and Zoho Books

In an implementation of Zoho One, Zoho CRM is used as the interface by the sales team to capture invoice details. The integration with Zoho Books with CRM enables the details of the invoices to flow to Zoho Books immediately. Zoho Books provides standard reports. Here is a case study for implementation in a retail industry how Zoho Books integrated with Zoho Analytics horsepowers a business with quality data and prevents revenue leak.

In the retail industry, the sales value per invoice is generally of a small denomination, but the sales volume is high. The context is some items are taxable, and some are not. Therefore, it is very critical to ensure taxation is done correctly in individual invoices. The repercussions of not having proper taxes are revenue loss, non-compliance, and paying excess tax.

To manually verify every invoice for an error in taxation is a cumbersome and almost impossible task. Moreover, it is still error-prone. With Zoho Analytics, which is an application that allows us to query any module and any field of Zoho Books, we are achieving data sanity by creating exception reports. Query tables of Zoho Analytics enable combining multiple tables and perform many operations like a typical DBMS query interface.

We have created exceptions for,

- Invoices not having taxes for items that they supposed to have
- Invoices having taxes for items they are not supposed to have
- Bills not having taxes for items that they are not supposed to have

- Bills having taxes for items that they are not supposed to have

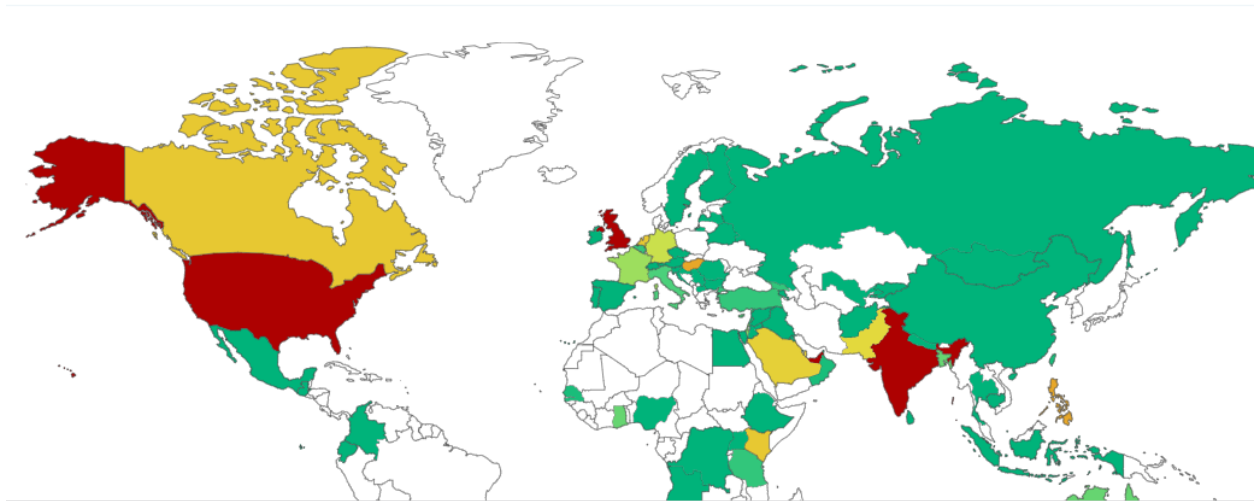
It was made possible by the excellent query interface of Zoho analytics. What's more, we can schedule this daily to the Accounts team where they can verify it; and create another email schedule to the management once a month as an escalation if these exceptions aren't resolved. The combination of querying the database, scheduling it as an email, escalating if not acted ensured that the errors done by the sales agent were captured and addressed on time.

Zoho Campaigns Success Story

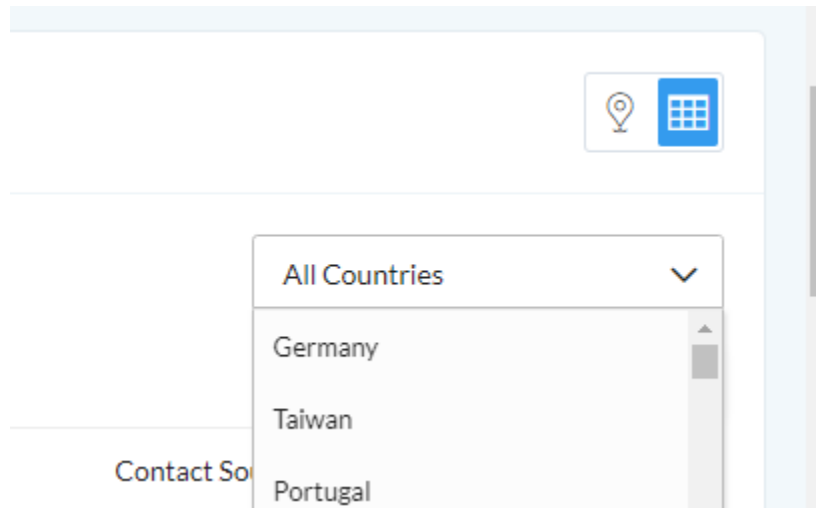
This brief is about one of the many interesting features of Zoho Campaigns that we harnessed recently.

A crucial aspect of sending a marketing mailer is reviewing the results. Zoho Campaign provides unique views of the results. What wowed me today is the following feature. There could be other mailing software that has these features, the simplicity and speed at which we can use this in Zoho Campaigns made the difference.

The view report of a sent campaign provides a map, as the below image, for example. For the follow-up email, I wanted to focus only on one country. I was wondering how to convert the map contacts in a tabular view. Zoho campaigns did not let me wander for very long.



Right above the map we could see tabular format, in which I can choose which country I am looking for.



Now that's not all. I wanted to target by location. For that like a genie, Campaigns provided this button. The small tick icon helps to 'Mass Update'.

Opens by Location



Upon clicking it allows even to add a new field. I added a custom field 'Openers from Xxx Country'. In contacts I created a segment using this field 'Openers From Xxx Country'. Created my next mailer as a follow up mail to the parent one with 'new list' I had created above and sent it. The ease of use and ability to complete all that required in a single form, with 2-3 steps differentiates Zoho Campaigns.

Mass Update Fields

You are about to mass update contacts who have opened from United Arab Emirates in the email campaign.

Include unsubscribes

Choose field

---Select a field from the picklist---

Specify new value

=

Note: If left blank, the current field value will be deleted.

[Add New Custom Field](#)

Proceed

Cancel

This mailer has not received a single unsubscribe, implying we are indeed targeting a right audience with the right message; also implying how Zoho Campaigns enhances accuracy in targeting a specific segment.

Zoho CRM: Overcome a bug by simple validation

Zoho Books looks for the country United States of America as 'U.S.A' and Zoho CRM can update it as 'United States'. Whenever a lead from the USA establishes contact with our client, the IT team needs to pitch in to resolve the country name mismatch in Zoho Books. IT intervention is required because Books is unable to recognize the United States and puts a blank 'country name' and blank 'state name' subsequently causing issues with online payment of the invoice through payment gateways.

We solved it with a simple Workflow Rule, that checks if the country name entered in CRM modules – Leads/Accounts/Contacts is 'United States', if so, it will be changed immediately to 'U.S.A'

Power of workflow used efficiently.

Zoho CRM: Queuing System for Inquiries Using Custom Modules

There is a deluge of sales inquiries for this retail customer. Queries come from various channels. The management was concerned if all the queries were addressed as every inquiry matters.

We want to pre-process to establish a kind of Queue so that every inquiry is documented. Also queuing enables the inquiry to be picked up by any available person as each inquiry can take a different time to handle. If leads are 'assigned' to a specific person, the action depends on when the person is available. Queuing reduces wait time substantially.

We used the custom module to address this business process requirement. We created a simple two-field module where inquiries that are unassigned are input in one field and who has taken that inquiry in another field. To start with, the 'lead taken by' column is empty. The sales team, whenever available, picks an inquiry from this queue and updates their name in 'lead taken by.' A workflow is also set up to trigger an email to the person in 'lead was taken by' in case it is assigned by another user. The system also triggers an email at a specific time of the day on inquiries that are not acted upon.

This acted as a panacea for the concern of the management if all leads are acted upon and if not, taking timely actions.