

Docyt



Case Study

Introduction

Infobyd Software Solutions is a leading technology services provider and a Zoho Authorized Partner with over nine years of experience in delivering cutting-edge digital solutions. Our expertise lies in developing comprehensive, scalable, and highly customizable software applications tailored to meet the specific needs of businesses across various industries. Specializing in Zoho products, we offer end-to-end solutions, including CRM implementations, ERP systems, AI-driven automation, and integrated platforms that help organizations streamline operations, boost productivity, and enhance customer engagement.

At Infobyd, we pride ourselves on our commitment to delivering high-quality solutions that drive measurable results for our clients. Our team of experienced developers and consultants work closely with businesses to understand their unique challenges and provide innovative solutions using Zoho's powerful suite of products, including Zoho CRM, Zoho Creator, Zoho Analytics, and more. We have successfully transformed operations for clients in diverse sectors such as manufacturing, education, finance, and healthcare.

As a trusted partner in digital transformation, Infobyd continues to push the boundaries of technology, empowering businesses to achieve their strategic goals

Case Study

01 Zoho People Implementation for Docyt

Client: Docyt

Industry: Document Automation & AI for Accounting Firms

Solution: Zoho People HR Management System

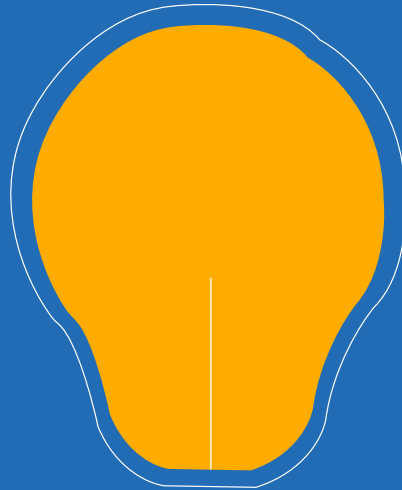
Docyt is a growing company that leverages AI-powered solutions to streamline document management for accounting firms and CPAs. As the company expanded, managing HR processes like employee onboarding, time tracking, leave management, performance reviews, and payroll became increasingly complex. Zoho People was chosen as the solution to manage these HR functions efficiently.

02 Overview

Docyt's HR team required an integrated, automated platform to handle essential HR processes and ensure smooth operations across its expanding workforce. The organization wanted a solution that would streamline administrative tasks, reduce manual errors, and improve the employee experience.

The Zoho People system was selected for its comprehensive features, ease of use, and ability to integrate with other Zoho products like Zoho Books for payroll management. This case study outlines the implementation process, challenges faced, and the overall impact of Zoho People on Docyt's HR operations.

Key Takeaways



- **Centralized HR System:** A unified platform like Zoho People simplifies HR tasks, reduces the need for multiple tools, and ensures data consistency.
- **Automation Saves Time:** Automating manual processes such as leave requests, attendance tracking, and performance reviews allows HR teams to focus on strategic tasks.
- **Employee Self-Service is Critical:** Giving employees more control over their HR data and processes improves satisfaction and engagement.
- **Customization is Key:** Tailoring the platform to fit Docyt's specific HR needs was crucial for a successful implementation.
- **Integration Matters:** Linking Zoho People with other Zoho products (like Zoho Books) improved payroll accuracy and reporting.

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03 Executive Summary

The case study highlights the successful implementation of Zoho People, a comprehensive HR management system, for Docyt, a fast-growing company specializing in AI-powered document automation solutions for accounting firms. With the increasing complexity of managing a growing workforce, Docyt faced challenges such as inefficiencies in manual HR processes, fragmented systems, and compliance difficulties. Zoho People was selected as the ideal solution for its automation capabilities, integration with Zoho Books, and user-friendly features.

Through a structured implementation process—including planning, customization, integration, and training—Zoho People streamlined Docyt's HR operations. Key outcomes included improved efficiency, enhanced employee satisfaction, accurate payroll processing, and better reporting capabilities. This transformation not only addressed Docyt's immediate challenges but also positioned the company for future growth by optimizing its HR processes.

04 Problem Statement and Key Challenges

Before implementing Zoho People, Docyt faced several HR challenges:

- **Manual Processes:** Many HR processes, including leave requests, time tracking, and performance reviews, were managed manually, leading to inefficiencies and errors. Zoho People optimized Docyt's HR operations.
- **Disjointed Systems:** The HR team used various software tools that did not integrate seamlessly, resulting in a fragmented experience and the need for redundant data entry.
- **Employee Management Complexity:** With a growing workforce, managing employee data, roles, performance, and payroll manually became overwhelming.
- **Compliance & Reporting Issues:** Ensuring accurate payroll and tax reporting was complex and prone to error.

These challenges highlighted the need for a centralized, automated HR solution to improve efficiency, reduce errors, and enhance employee satisfaction.

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05 Evaluation of Problem

Before adopting Zoho People, Docyt's HR operations were burdened by several inefficiencies and limitations:

1. **Manual Processes:** Managing core HR tasks such as leave requests, time tracking, and performance reviews manually led to delays, errors, and increased administrative workload.
2. **Fragmented Systems:** The reliance on disconnected software tools resulted in redundant data entry and a lack of streamlined workflows.
3. **Employee Management Challenges:** As the workforce grew, tracking employee data, roles, and payroll manually became increasingly complex and unmanageable.
4. **Compliance and Reporting:** Payroll and tax compliance processes were error-prone, risking regulatory issues.

These challenges significantly impacted operational efficiency and employee experience. The lack of a centralized, automated system hindered HR's ability to focus on strategic tasks, highlighting the urgent need for a scalable, integrated solution.

06 Proposed Solution

To address these challenges, we proposed implementing Zoho People, a comprehensive HR management software that integrates all key HR functions in one platform:

- **Onboarding:** Streamline the employee onboarding process, automating document collection, task assignment, and welcome communications.
- **Time & Attendance:** Automate work hours tracking, leave requests, and approvals.
- **Performance Management:** Track employee performance through appraisals, goals, and KPIs.
- **Payroll Integration:** Automate payroll processing with custom salary structures and deductions, integrated with Zoho Books for tax compliance.
- **Employee Self-Service Portal:** Allow employees to manage their personal information, track performance, and request time off.

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07 Implementation

The implementation of Zoho People for Docyt was carried out in the following phases:

1. Planning & Analysis:

- Conducted a detailed analysis of Docyt's existing HR processes.
- Identified key requirements such as onboarding, leave management, performance tracking, and payroll integration.

2. Customization & Setup:

- Created custom forms for onboarding, leave requests, and performance reviews.
- Defined organizational structure, user roles, and permissions.
- Configured leave types, time tracking policies, and payroll components.

3. Screenshots:

- Organizational structure setup.
- Custom form creation for employee onboarding.
- Leave request configuration.

4. Integration:

- Integrated Zoho People with Zoho Books for seamless payroll processing.
- Set up automated notifications and workflows for leave approvals, time log submissions, and performance reviews.

5. Training:

- Conducted training sessions for HR personnel and employees to familiarize them with the new system.
- Provided a comprehensive user manual and ongoing support.

6. Go-Live:

- Completed a successful deployment and transitioned all HR operations to Zoho People.
- Continuous monitoring and troubleshooting to ensure smooth operations.

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08 Results

The implementation of Zoho People at Docyt led to significant improvements in HR management, including:

- **Improved Efficiency:** Automation of tasks like leave approvals, payroll processing, and performance appraisals saved time and reduced errors.
- **Employee Satisfaction:** The self-service portal allowed employees to manage their information, request time off, and track their performance, leading to higher engagement.
- **Accurate Payroll Processing:** Integration with Zoho Books ensured accurate and timely payroll processing with compliance to tax laws.
- **Better Reporting:** With customizable reports, HR managers gained better insights into attendance, leave trends, and employee performance.

The transition to Zoho People helped Docyt streamline their HR operations and prepare for future growth.

Docyt India Pvt Ltd

21 Oct



Excellent service. Timely response from the team helps us to seamlessly implement new features and modules

INFOBYD SOFTWARE SOLUTION PVT LTD

alok@infobyd.com | +91- 9685 3534 94

