

Hardshell Tax



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 Hardshell Tax: Leveraging Zoho Creator for Process Automation

Client: Hardshell Tax

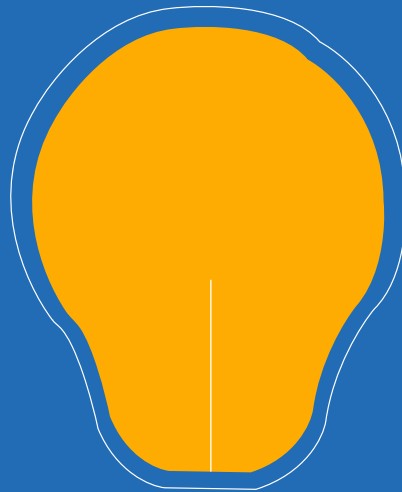
Solution: Zoho Creator Automation

Hardshell Tax, a leading provider of tax consultancy services, faced inefficiencies in its order lifecycle management, from booking to dispatch. They sought a centralized and automated solution to streamline operations and improve customer satisfaction. Collaborating with Infobyd Software Solutions, they implemented a tailored solution using Zoho Creator. The newly automated workflow aligns with the process flow provided, where the journey begins with the customer order and progresses through item selection, batch and size confirmation, order booking, and a series of validations to dispatch the items efficiently.

02 Overview

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Key Takeaways



- Role-based permissions ensured data security while allowing each team to access relevant information.
- Ensure that only authorized personnel can approve or reject reports.
- Assign statuses like Approved, Not Approved, and Pending to each project
- In Zoho CRM, Create the Deals, each tailored to a specific department or project.

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03 Executive Summary

Hardshell Tax's traditional order-to-dispatch process relied heavily on manual interventions, resulting in delays, lack of transparency, and customer dissatisfaction. By adopting Zoho Creator, they automated the process, enabling real-time decision-making, better resource allocation, and streamlined order management.

This implementation achieved a 30% increase in efficiency, reduced processing errors, and enhanced team collaboration, ultimately improving client satisfaction.

04 Problem Statement and Key Challenges

- **Fragmented Processes:** Disjointed order management, inventory, and dispatch systems caused inefficiencies.
- **Manual Errors:** Frequent inaccuracies in data entry and tracking delayed order processing.
- **Lack of Real-Time Visibility:** Inability to track orders, inventory, and dispatch updates centrally.
- **Delayed Order Confirmation:** Manual decision-making created bottlenecks.
- **Inventory Mismanagement:** Poor stock tracking led to stockouts or overstocking.
- **Poor Collaboration:** Limited integration between sales, warehouse, and logistics hindered workflows.
- **Customer Dissatisfaction:** Errors and delays reduced trust and satisfaction.
- **Scalability Challenges:** Existing systems couldn't support growing business demands.

These challenges highlighted the need for an automated, integrated solution to streamline operations and improve efficiency.

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05 Evaluation of Problem

1. Fragmented Operations:
 - Processes across sales, inventory, invoicing, and dispatch were managed in silos.
 - Lack of a centralized platform caused information flow delays.
2. Manual Dependencies:
 - Decision points like order confirmation and warehouse assignment required manual approval, slowing the process.
3. Inventory Management Issues:
 - No efficient system to track batch details or item sizes, leading to errors in order fulfillment.
4. Customer Dissatisfaction:
 - Delays in invoicing and dispatch resulted in complaints and reduced customer trust.
5. Logistics Inefficiencies:
 - Ineffective transport and warehouse allocation caused delayed deliveries.

06 Proposed Solution

Hardshell Tax opted for a tailored solution using Zoho Creator, a low-code platform capable of automating workflows and integrating seamlessly with existing operations.

Solution Highlights

- End-to-End Workflow Automation: Digitized the entire order management lifecycle, from customer orders to dispatch.
- Centralized Platform: Real-time tracking of orders, batch, and size details for enhanced visibility.
- Integrated Logistics: Automated assignment of warehouse resources and transport logistics.
- Decision Automation: Streamlined approval processes for order confirmation and resource allocation.

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07 Implementation

Process Mapping: Infobyd Software Solutions analyzed Hardshell Tax's workflows, identifying inefficiencies.

Solution Development:

- Sales Module: Captured customer orders.
- Inventory Module: Managed item details and stock tracking.
- Automation: Validated and confirmed orders automatically.
- Logistics Module: Streamlined warehouse and transport assignments.
- Invoicing Module: Automated invoicing and dispatch tracking.

Testing & Feedback: Conducted rigorous testing and refined workflows based on user input.

Deployment: Rolled out the solution organization-wide with comprehensive user training.

08 Results

Through the adoption of Zoho Creator, Hardshell Tax successfully streamlined its operations and eliminated inefficiencies. This transformation not only improved internal workflows but also boosted customer satisfaction and positioned the company for sustained growth.

By partnering with Infobyd Software Solutions, Hardshell Tax demonstrated how businesses can leverage low-code platforms like Zoho Creator to achieve operational excellence and drive innovation.

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