

Case Study

01 Sujan Industry

Client: Sujan Industry

Industry: Manufacturing

Solution: Zoho Creator For Manufacturing Process

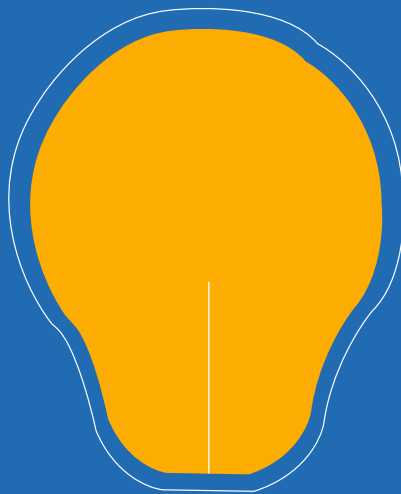
This case study explores how an Sujan Industry streamlined their operations using a detailed Creator or CRM system designed by Infobyd Software Solutions.

02 Overview

Problem Description: Sujan Industries, a leading manufacturer, faced challenges in managing their operations efficiently due to the lack of an integrated system. They required a robust solution to handle data, enhance workflow efficiency, and streamline their processes. Zoho

Products Solution: Infobyd Software Solutions delivered a tailored solution leveraging Zoho Creator, a powerful low-code platform, to address Sujan Industries' unique operational challenges. By utilizing Zoho Creator, they built custom applications and workflows to streamline processes, enhance data visibility, and improve collaboration.

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.

Case Study

03 Executive Summary

Sujan Industries, a leading manufacturer specializing in rubber, metal, and plastic components, serves diverse sectors ranging from government to private enterprises across multiple states. Despite its extensive operations, the company faced significant challenges in managing complex calculations for Bills of Process (BOPs) and ensuring smooth operations across its production and sales workflows.

04 Problem Statement and Key Challenges

The Challenge: Sujan Industries struggled with:

- Fragmented data management across departments.
- Manual processes causing delays in decision-making.
- Limited visibility into operational performance.
- Critical business calculations like pricing, Amount structures, and discounts were prone to human error, leading to inconsistencies.
- Lack of roles-based permission system led to unauthorized access and data mismanagement.
- Large organization with multi-department structures.
- Sensitive information like pricing, commissions, or client financial data is visible to all users in a module.

05 Evaluation of Problem

Infobyd Software Solutions designed and implemented a detailed CRM system, fully integrated with Zoho Creator, to address these challenges. The solution included:

- Custom Workflows: Automated processes to reduce manual errors.
- Data Centralization: Consolidated data across departments into a single platform for easy access.

Case Study

- Enhanced Reporting: Real-time Reporting for better decision-making.
- Manage Roles & Permission: Limited to specific departments or modules.
- Data Integration: Linked Zoho Creator and CRM for seamless data sharing between modules.
- Level Security: Use field-level permissions to restrict sensitive data to specific roles or profiles

06 Proposed Solution

To address Sujan Industries' challenges in managing production requirements, workflow calculations, and tracking deal stages effectively, Infobyd Software Solutions proposed a tailored solution using Zoho Creator and Zoho CRM. These applications were chosen for their ability to integrate seamlessly, automate complex processes, and provide actionable insights, ensuring improved operational efficiency and enhanced decision-making.

- Zoho Creator : Developed custom applications for production planning, BOP's management, and procurement. Developed a BOP's module to streamline the management of material requirements, labor costs, and production timelines.
- Zoho CRM: Centralized platform for managing deal pipeline, Designed a structured sales pipeline with stages including. Created dashboards and reports to track deal.

Case Study

07 Implementation

The implementation was carefully structured in phases to ensure a smooth and minimal disruption to the customer's operations:

1. Phase 1: Zoho CRM Setup and Data Migration CRM Customization: 1. Configured Zoho CRM specifically for Suján Industries' operations, focusing on deal stages. 2. Defined a standardized deal pipeline with stages such as Raise RFQ, BOP's, Cost Estimation, Price estimation, and Deal Closed.
2. Phase 2: Zoho Creator Integration for Production and Workflow Automation Custom Application Development:
 - Built modules in Zoho Creator to automate complex calculations for BOPs, including cost estimation and material usage.
 - Designed forms to capture raw material, Man time, and overhead details with real-time calculations.

08 Results

The implementation of Zoho CRM and Zoho Creator by Infobyd Software Solutions delivered immediate and measurable benefits to Suján Industries:

1. Increased Efficiency
 - Streamlined Operations: Automation of BOP calculations and production workflows led to a 25% reduction in processing time for production planning.
 - Production Forecasting: Improved alignment of or reduced delays by 20%, ensuring timely order fulfillment.
2. Improved Dealer Management
 - Real-Time Tracking: The centralized system allowed Suján Industries to track reporting in real-time.
 - Enhanced Relationships: Automation of communications via integrated workflows strengthened improving satisfaction and loyalty.

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Sujan Industry

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Team is very responsive and they have implemented CRM solutions very smoothly as well as email migration and email onboarding was also done very properly.

INFOBYD SOFTWARE SOLUTION PVT LTD

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

