

Zoho Creator and CRM Implementation National Event Management



Business Name

National Event Management

Company Profile

- Website www.nationalevent.com
- Industry Event Management / Exhibition and Conference Management
- Type B2B
- Location Ontario, Canada

Solution Provided:

- Zoho Creator and CRM – Custom Production Management Application

Case Study



Introduction

Infobyd Software Solutions is a rapidly expanding IT organization and a certified Zoho Advanced Partner, recognized for delivering comprehensive business solutions through Zoho's powerful suite of applications. As a trusted digital transformation partner, Infobyd enables organizations to streamline operations, enhance customer engagement, and accelerate business growth through innovative technology solutions.

Case Study

With a deep focus on client success, Infobyd delivers fully customized, end-to-end Zoho implementations across multiple business functions — including Customer Relationship Management (CRM), Finance, Human Resources, Inventory Management, Procurement, and more. Each solution is tailored to the client's unique workflows, ensuring seamless system integration and process optimization.

Beyond solution design and deployment, Infobyd also provides robust Quality Assurance (QA) services, offering both manual and automated testing capabilities. Leveraging Zoho Sprints for structured project and test management, the team ensures efficient test planning, defect tracking, performance validation, and continuous quality enhancement.

To date, Infobyd has successfully delivered 1,750+ projects across diverse industries such as Healthcare, Manufacturing, Education, Solar Energy, Fleet Management, Trading, Information Technology, Print & Publication, Multimedia Advertising, and Financial Services. This broad industry expertise, combined with deep knowledge of the Zoho ecosystem, empowers Infobyd to deliver scalable, reliable, and future-ready solutions that drive measurable impact and long-term success for modern enterprises.



Project Overview

The National Event project was designed to streamline and manage events organized across multiple cities. Each event included different products and services, each associated with specific costs. The primary goal was to establish a structured system that enabled efficient planning, execution, and tracking of events.

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By centralizing the details of city-wise events, product variations, and cost allocations, the system ensured better visibility, transparency, and control over the event management process. This approach not only simplified operations but also helped in accurate budgeting and decision-making for future events.

In the National Event application, there are three ways for an end user to create a deal: through the web contract, by recalling the deal via a URL, or by using the dedicated button in the CRM for regular deals. This software has been developed in two languages English and French. The system automatically calculates the total for all products and generates a receipt, which is sent to the customer via email. If a deal is cancelled, the stage is updated according to the payment status. In the case of Closed Won – Cancelled, it means that some or all of the payment is retained by the company. For Closed Lost – Cancelled, it indicates that a refund has been issued or no payment was received. The Exhibitor Registration section is adjusted accordingly—set to zero for deals marked as Closed Lost and updated to reflect the revised payment amount for deals marked as Closed Won. Additionally, all related CRM fields are updated to remove the name of the cancelled event to ensure data accuracy and clarity.



Key Features

- **Multi-City Event Management** – The system allows seamless organization and tracking of events across different cities, ensuring each event is handled with city-specific details.
- **Product & Cost Allocation** – Every event includes multiple products, and each product is mapped with its particular cost, making it easier to manage event-wise and product-wise budgets.

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- **Payment Modes** – The platform supports multiple payment options, including credit card and e-transfer, providing flexibility and convenience for clients and customers.
- **Automated Email Communication** – The system integrates mail functionality for smooth communication:
 - **Welcome Mail** – Sent to clients/participants for confirmation and engagement.
 - **Signature Mail** – Ensures professionalism and brand consistency.
 - **Agent Notification Mail** – Event agents automatically receive relevant emails for updates and coordination.



Problem Statement

- **Data Synchronization** – All details from the Zoho Creator deal form needed to be accurately fetched into the CRM's deal module along with the correct pricing, ensuring no discrepancies between the two systems.
- **Complex Deal and Contract Management** – Agents needed to handle multiple events and products per client, often requiring custom contracts, which made manual tracking time-consuming and error-prone.
- **Email Functionality Across Scenarios** – Multiple mail scenarios had to be handled, including welcome emails, signature mails, and agent notifications, each requiring proper content and timing.
- **PDF Attachments with Deals** – Emails needed to include attachments in PDF format with complete and accurate deal details, providing clarity and professionalism for clients and agents.

Additional Notes

- Staff Management for Rebook/Recall processes is handled through the Critical Path Application in Zoho Creator.

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- Each Agent has access to specific Contract Buttons within their assigned circuit and language configuration.



Finding The Solution

To address the challenges in event and show management, a fully integrated Zoho Creator-based solution was implemented, providing automation, real-time synchronization, and multilingual support. Key solutions included:

1. Automated Deal and Contract Management

- Agents can create deals or pre-contracts for multiple events simultaneously.
- Contracts can be sent directly to clients via email or website links, reducing manual follow-ups.
- Custom and standard products can be selected or created within the system.

2. Seamless Client Communication

- Automated notifications for contract submission, failed attempts, and payment reminders.
- Multilingual support (English and French) ensures smooth communication for diverse clients.

3. Integrated Payment Processing

- Secure credit card payments with real-time CRM updates.
- E-Transfer, wire, and cheque payments synced automatically.
- Postpone payment option available per circuit to accommodate client needs.

4. Real-Time CRM Synchronization

- Automatic updates for all related contacts, companies, and deals.

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- Event-specific details such as exhibitors, speakers, sponsors, goodie bags, and contra are tracked accurately.

5. Exhibitor Registration Automation

- Registration records are automatically generated and linked to corresponding deals.
- CRM reflects all associated exhibitor and company details, improving post-event management.

6. Efficient Cancellation and Refund Management

- Deal stages, exhibitor records, and CRM fields are updated automatically based on cancellation status.
- Partial or full refunds handled systematically, reducing manual errors.

7. Enhanced Staff Management and Workflow Control

- Rebook/Recall processes managed through the Critical Path Application.
- Agents access specific contract functionalities based on assigned circuits and language configurations.



Outcome

The solution streamlined event creation, contract management, payments, and CRM updates, reducing manual effort, improving accuracy, and ensuring a seamless experience for both agents and clients.

Client Testimonial



Danielle Markus

Vice President of Sales | National Event Management

About ZOHO and INFOBYD

"Infobyd is a valuable partner and they work hard to optimize our use of all Zoho applications."



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