Aegis Projects

PROPERTY & DEVELOPMENT CONSULTANTS
for Retirement and Aged Care

Client: Rob Bernstein
Country: New Zealand
Total Users: 02

Company

Aegis Projects Limited is a company specialising in the retirement village and aged care sectors. Services they provide are :

- Feasibility assessments
- Development planning
- Design management
- Project management
- Development management
- Leadership and general management
- Operational management from inception to longer-term management service
- Management of sales and marketing
- Management of compliance

They believe in promoting the sustainability of property solutions for retirement villages and aged care facilities.
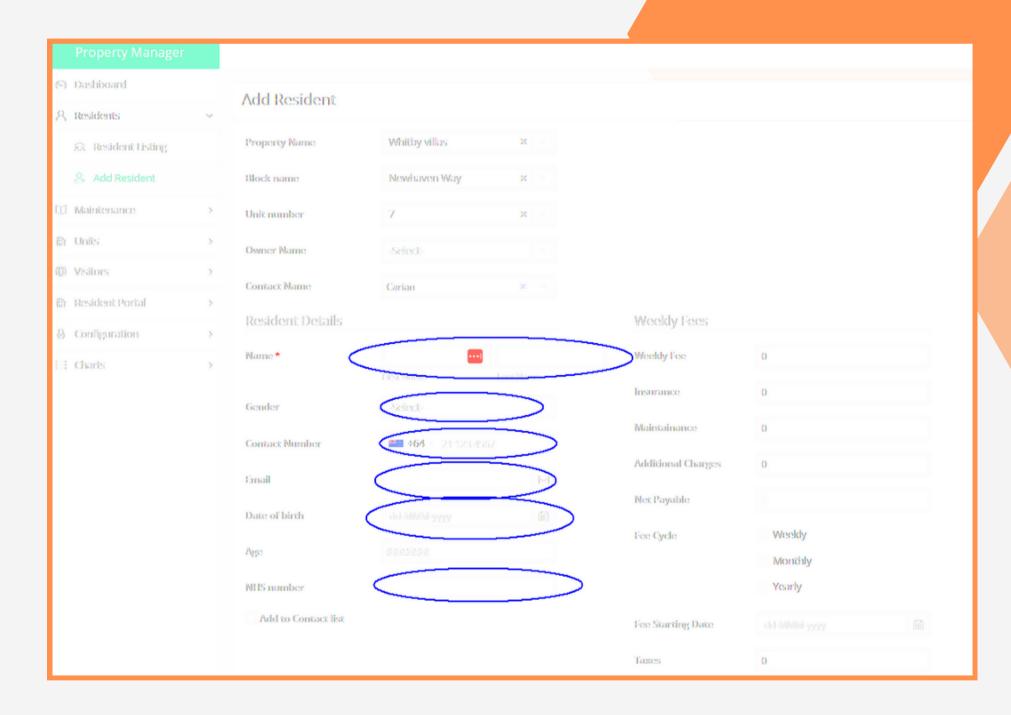
Challenge Overview

Aegis Projects, a leader in retirement village and aged care solutions, faced multifaceted challenges in their property and development consulting services. The key hurdles included deficiencies in existing portals, data migration complexities from Zoho CRM to Zoho Creator, the need for automation, seamless integrations, and role-based access control. The client sought a solution that would enhance overall user experience, streamline operations, and ensure robust data security.
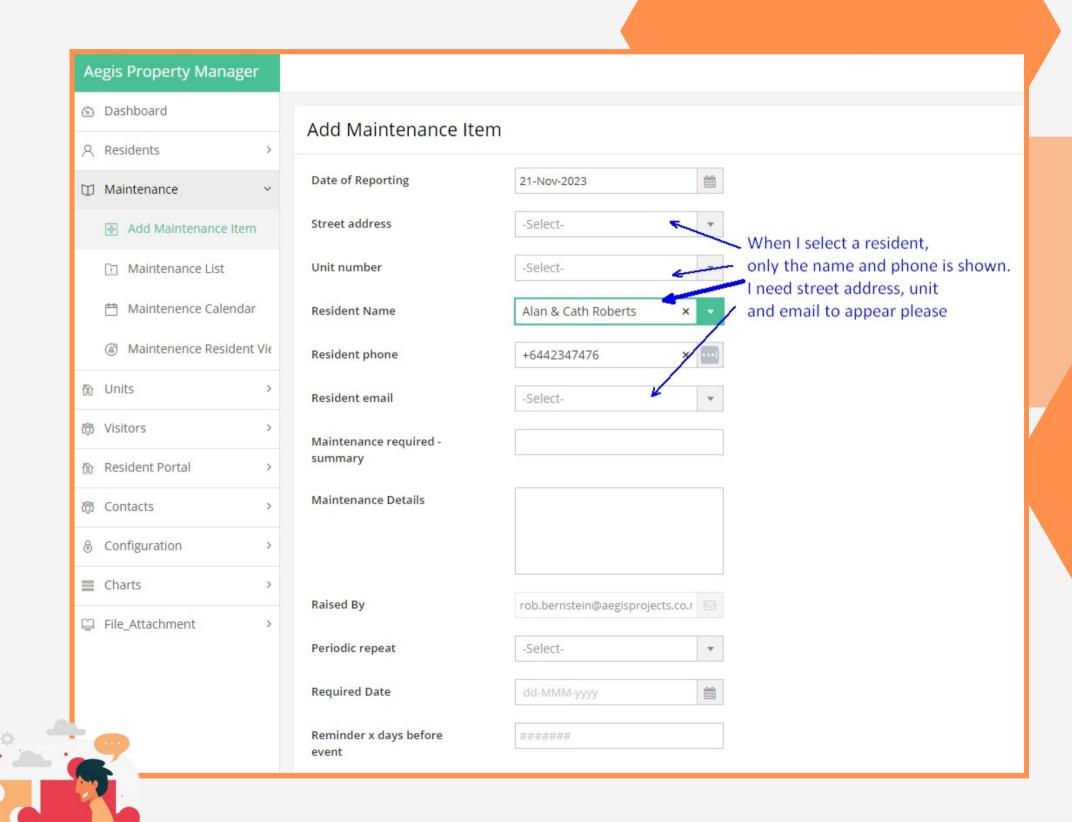
The Challenge

While pursuing transformation, Aegis Projects ran upon a variety of obstacles. Enhancing the user experience first and foremost required addressing navigational, data entry, and personalization flaws in the current portals and using user feedback to prioritise changes.
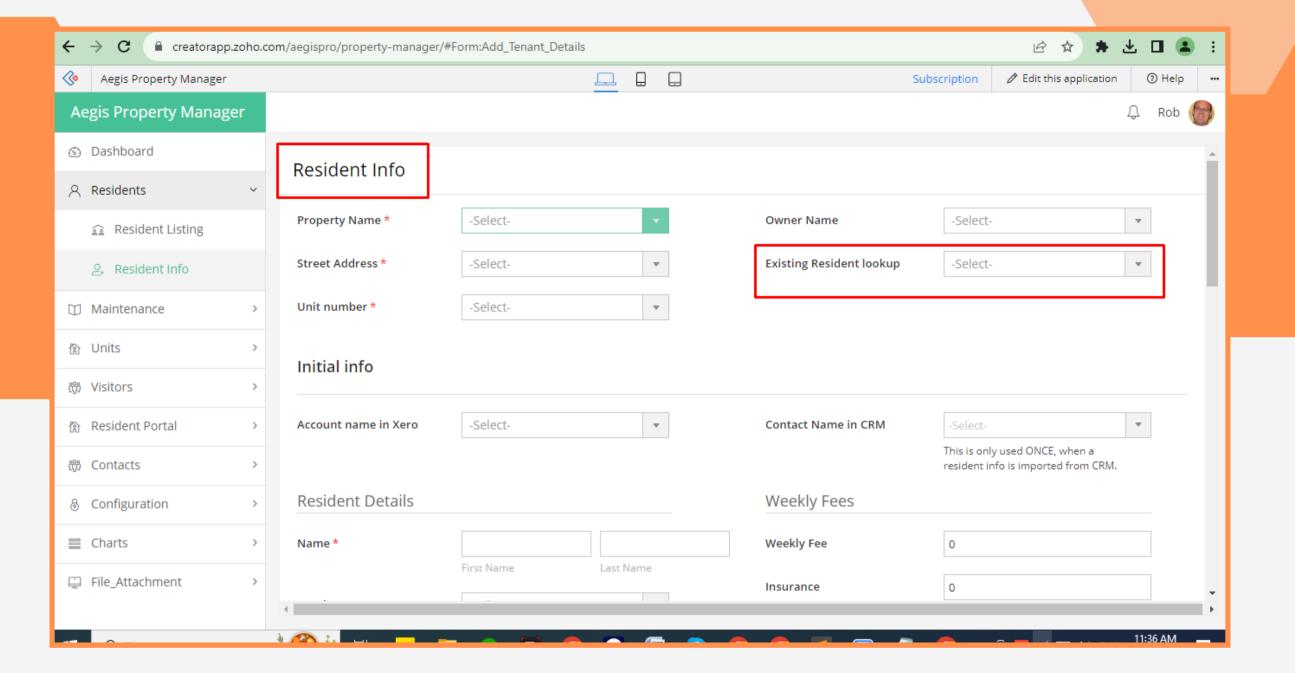
Automation was essential, involving the introduction of tools to automate email notifications for pertinent events and user interactions, handle manual duties, and streamline operations.

Creating role-specific portals, integrating with pre-existing user portals, and establishing real-time data synchronisation between Zoho CRM and Zoho Creator were all priorities of seamless integration. An additional level of complexity was introduced by connecting Zoho Creator with Xero to streamline financial procedures.

To ensure that all users, including waiters, could view and edit only the data relevant to their jobs, the final challenge was to establish role-based access control. Additionally, tailoring portal functionalities based on user roles was necessary to improve data security and streamline operations.

Solution Overview - Leveraging Zoho Creator, Zoho CRM, and Xero for Streamlined Processes

Unicloud has strategically embraced a comprehensive solution by leveraging the powerful functionalities of Zoho Creator, Zoho CRM, and Xero to deliver an optimal outcome for our client. In addressing portal enhancement, Unicloud maximises the customization capabilities of Zoho Creator, tailoring forms, layouts, and workflows based on user feedback and specific business needs. The intuitive drag-and-drop interface ensures a seamless integration with the client's user portal, providing a user-friendly experience. Our data migration expertise shines through as we utilise Zoho CRM's export functionality to seamlessly extract contact data and employ Zoho Creator's import tools to ensure a smooth transition, maintaining data accuracy and integrity while incorporating comprehensive information such as notes, meetings, and tasks.
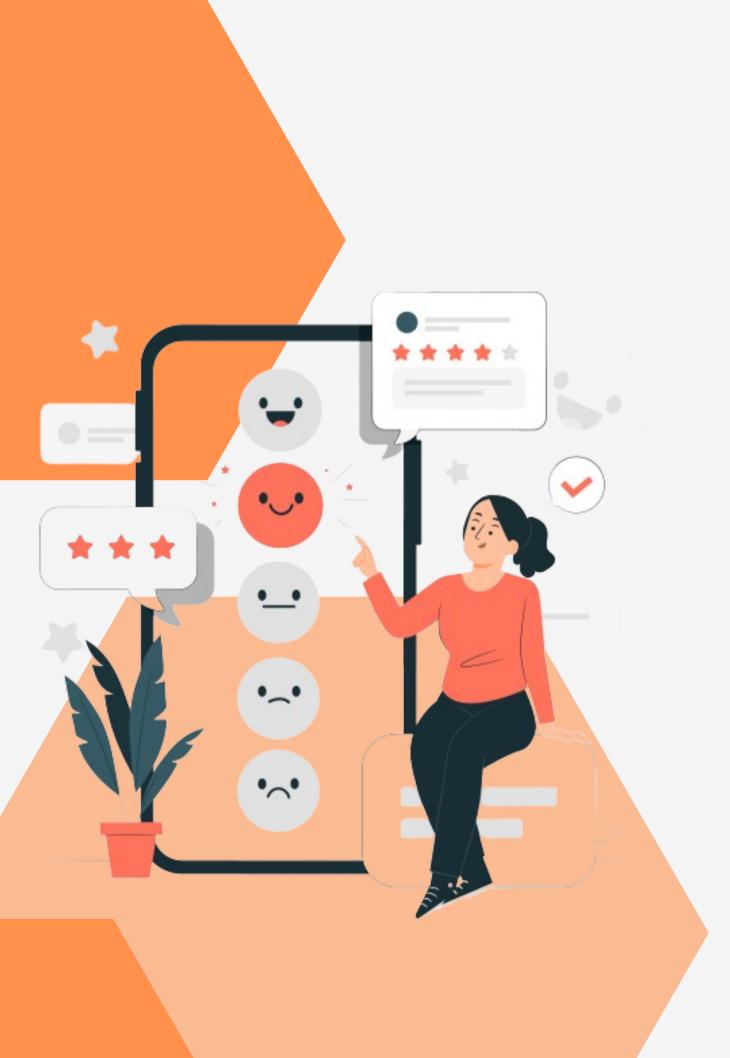
Automation, a key pillar of Unicloud's strategy, is implemented through Zoho Creator's workflow automation features, streamlining data processes and minimising manual efforts. Unicloud excels in establishing seamless integration between Zoho CRM and Zoho Creator, ensuring real-time data synchronisation for consistency across platforms. Moreover, our proficiency extends to customising the integration between Zoho Creator and Xero, providing a secure channel for the transfer of payment information without compromising sensitive bank details during property transactions. Unicloud's commitment to automation is further demonstrated in email notification processes, utilising Zoho Creator's rules to trigger timely notifications for relevant events, property details, and payment confirmations.

Data security is paramount to Unicloud, and we ensure robust control through the implementation of role-based access control using Zoho Creator's configuration capabilities. This guarantees that each user has access only to information relevant to their tasks, fortifying data confidentiality.

In the realm of financial processes, Unicloud's expertise in integrating Zoho Creator with Xero is exemplified through meticulous field mapping and secure communication channels, ensuring the seamless transfer of payment information and aligning with the client's stringent data security preferences. Unicloud's holistic approach encompasses portal enhancement, data migration, automation, integration, email notification, role-based access control, and secure financial processes, culminating in an optimal and transformative solution for our client's contact and property management needs.

The Result

By strategically leveraging Zoho Creator, Zoho CRM, and Xero, Unicloud successfully addresses the multifaceted challenges of portal enhancement, contact migration, invoice migration, Xero integration, email notification automation, and role-based access control. The seamless integration of these tools ensures a secure, streamlined, and efficient contact and property management system tailored to the client's unique requirements.

ABOUT US

Unicloud IT Services was officially launched in the year 2018 on the 12th of September. Unicloud IT Services is a cloud service provider company. With over total experience of more than 7 years, Unicloud's developers are committed to providing dedicated services for ZOHO products to its clients. Unicloud has a high rate of client retention and successful deliveries. We have more than 4000+ customers to whom we have provided the services and been providing support. Unicloud has completed 897+ Projects along with more than 4000+ satisfied customers and with a project succession rate of 95% to date and continuously working on more projects from different industries.

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