



Client Name: Vishal

Country: India

Total user: 140

Subscription: ZOHO One



# ABOUT AIMLAY

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Aimlay is a leading education platform that transforms the learning experience through innovative digital solutions. They provide interactive tools and resources designed to enhance education for both students and educators. Their platform features engaging online courses, advanced learning management systems, and interactive content tailored to diverse educational needs. Committed to accessibility and effectiveness, Aimlay empowers users with cutting-edge technology to achieve their academic goals and drive success in the evolving educational landscape. By focusing on quality and user experience, Aimlay strives to create a dynamic and impactful learning environment.







# PROJECT OVERVIEW

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The comprehensive implementation of Zoho solutions for Aimlay focused on improving operations across various departments. This project integrated multiple Zoho applications, including Zoho CRM, Zoho Desk, Zoho Projects, Zoho Creator, and Zoho Campaigns. The goal was to enhance efficiency, improve customer interactions, and support internal processes, resulting in a more effective operational framework for the client.

## PROJECT OBJECTIVE

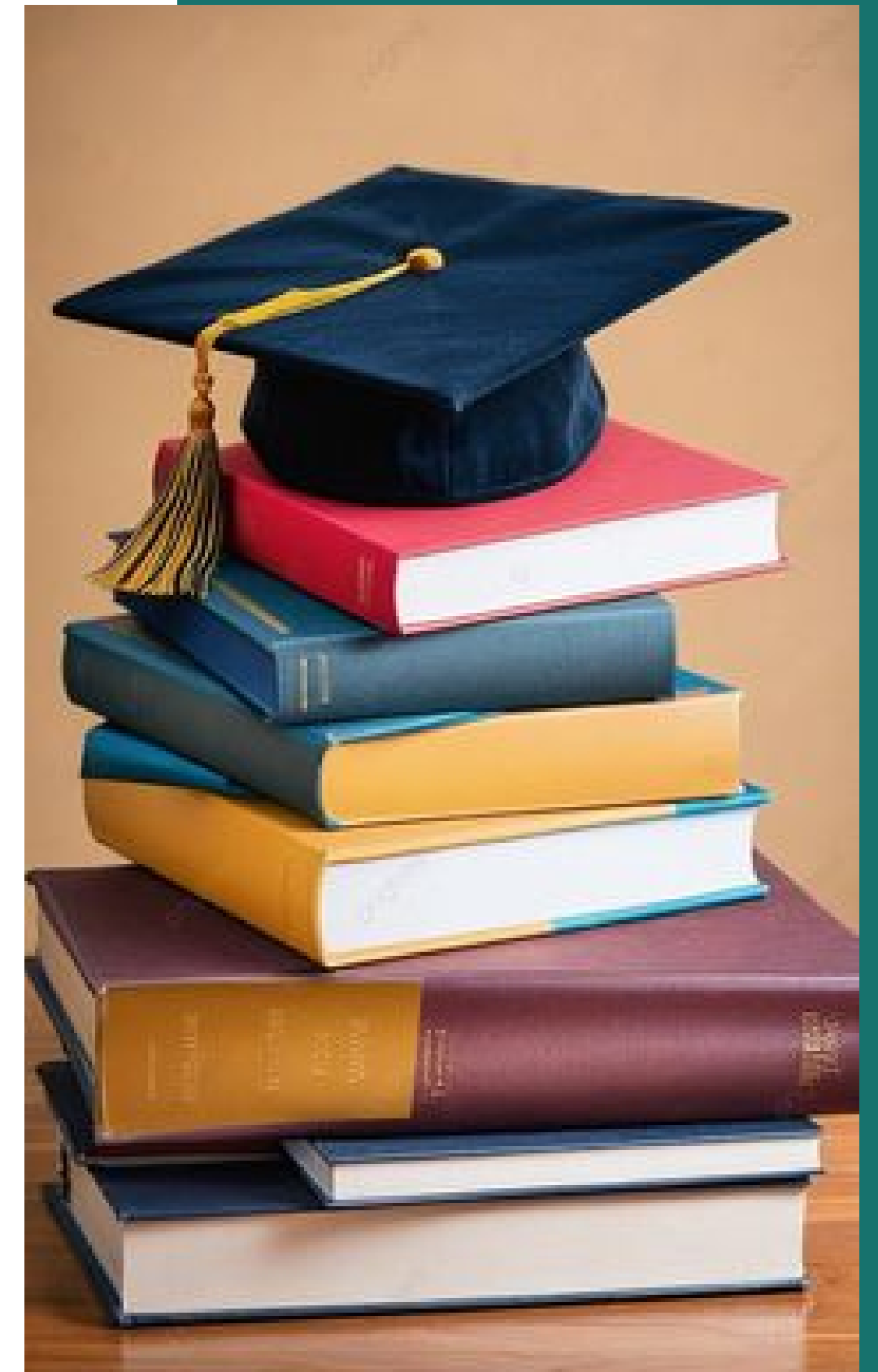
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The primary objectives of this project included migrating existing data and processes to the Zoho ecosystem to ensure effective integration. A centralized system was established for managing leads, customers, and projects, which facilitated better organization and accessibility of information. Key processes were automated to enhance operational efficiency and reduce manual workloads. Additionally, effective communication and reporting tools were enabled to support improved decision-making throughout the organization.

# CHALLENGES

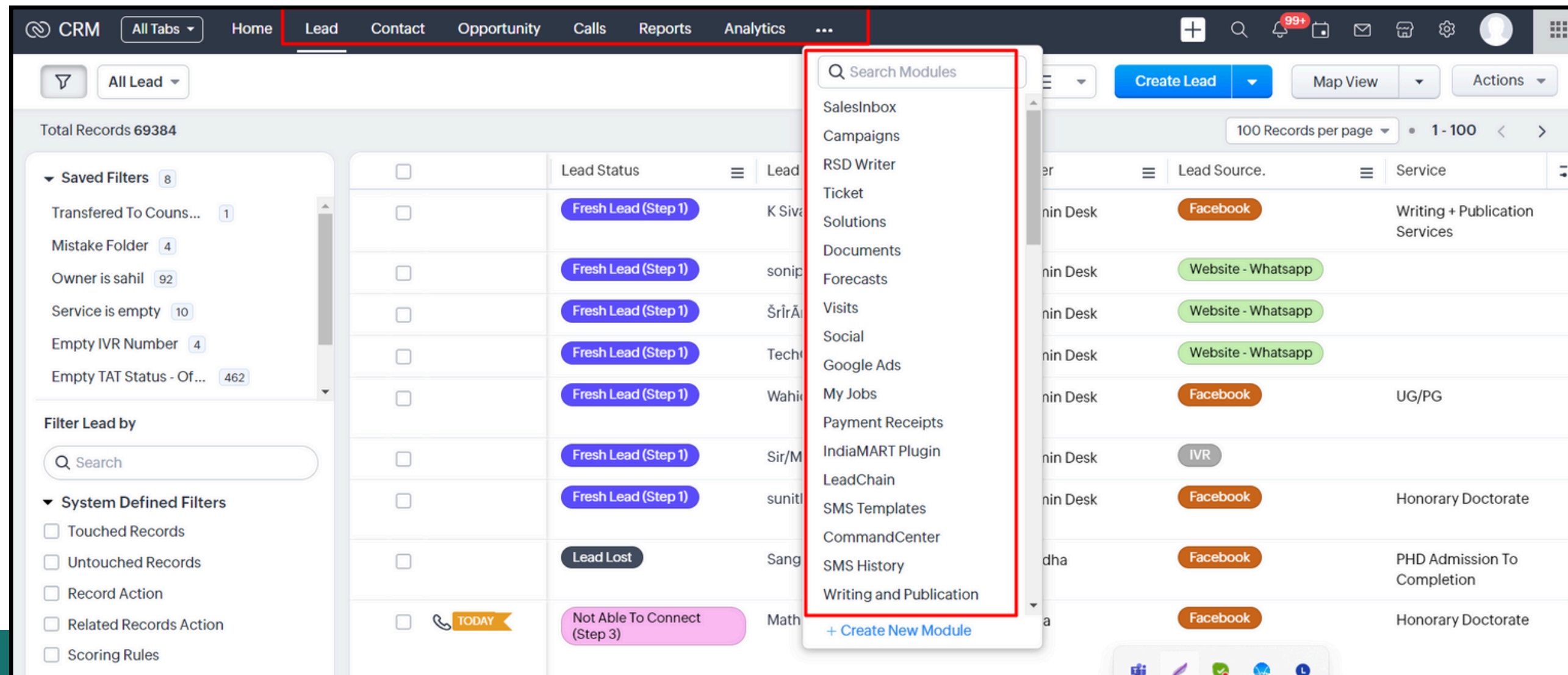
Major challenges we encountered during the implementation for Aimlay included resistance to change from staff, which can often arise when transitioning to new systems. There were also time constraints that limited the development and training phases, making it crucial to ensure that all team members could adapt quickly to the new tools. Additionally, resource allocation posed difficulties, as balancing project demands with existing responsibilities required careful management. Customization requirements added another layer of complexity, as tailoring the Zoho solutions to meet Aimlay's specific operational needs necessitated detailed planning and execution.

Ensuring that all integrated applications worked together smoothly while addressing these challenges was essential to achieving the project goals. Despite these obstacles, Unicloud IT Services remained committed to delivering a cohesive system that would enhance Aimlay's operational capabilities and customer interactions.



# FUNCTIONALITY AND FEATURES

- Module Creation: Customized modules were developed and integrated across various Zoho applications to address specific business requirements effectively.



- Forms and IVR Integration: Custom forms were created within the modules, and IVR integration was established to capture and record calls efficiently.

CRM

All Tabs

Home

Lead

Contact

Opportunity

Calls

Reports

Analytics

...

+

🔍

99+

🔔

📅

✉️

📁

⚙️

👤

🔼

All Lead

🔽

☰

🔽

Create Lead

Map View

Actions

Total Records 69384

100 Records per page

1 - 100

Saved Filters

8

Transferred To Couns...

1

Mistake Folder

4

Owner is sahil

92

Service is empty

10

Empty IVR Number

4

Empty TAT Status - Of...

462

Filter Lead by

🔍 Search

System Defined Filters

Touched Records

Untouched Records

Record Action

Related Records Action

Scoring Rules

| <input type="checkbox"/> | Created Time                           | Mobile       | Lead Status                  | Lead Name | Lead Owner |
|--------------------------|--|--------------|------------------------------|-----------|------------|
| <input type="checkbox"/> | <div>📞 TODAY</div> 11/10/2024 01:29 PM | <div>📞</div> | Not Able To Connect (Step 3) |           |            |
| <input type="checkbox"/> | 11/10/2024 01:57 PM                    | <div>📞</div> | Fresh Lead (Step 1)          |           |            |
| <input type="checkbox"/> | <div>📞 TODAY</div> 11/10/2024 01:56 PM | <div>📞</div> | Not Able To Connect (Step 3) |           |            |
| <input type="checkbox"/> | 11/10/2024 02:38 PM                    | <div>📞</div> | Fresh Lead (Step 1)          |           |            |
| <input type="checkbox"/> | 11/10/2024 02:33 PM                    | <div>📞</div> | Fresh Lead (Step 1)          |           |            |
| <input type="checkbox"/> | 11/10/2024 02:29 PM                    | <div>📞</div> | Fresh Lead (Step 1)          |           |            |
| <input type="checkbox"/> | <div>📞 TODAY</div> 11/10/2024 01:46 PM | <div>📞</div> | Not Able To Connect (Step 3) |           |            |
| <input type="checkbox"/> | 11/10/2024 01:31 PM                    | <div>📞</div> | Lead Lost                    |           |            |
| ...                      | <div>📞 TODAY</div> 11/10/2024 02:02 PM | <div>📞</div> | Not Able To Connect (Step 3) |           |            |

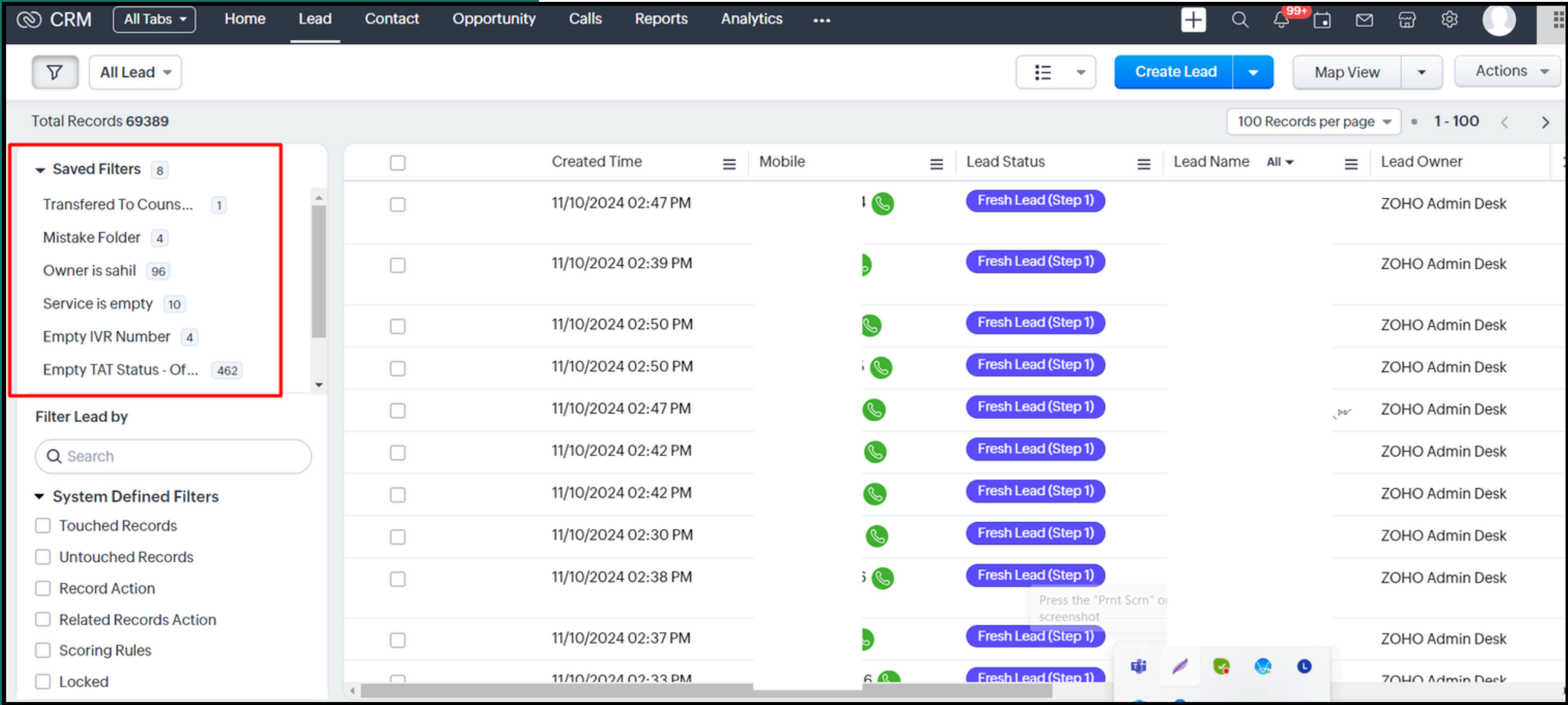
- Lead Filters: Filters were applied based on lead fields to enhance data management and organization.



# DATA INTEGRATION

integration of Various Online Platforms and Data Sources: Connected multiple online platforms and data sources, including:

- Customer and Employee Referrals
- Social Media Platforms
- Marketplaces
- University Referrals
- Website Interactions

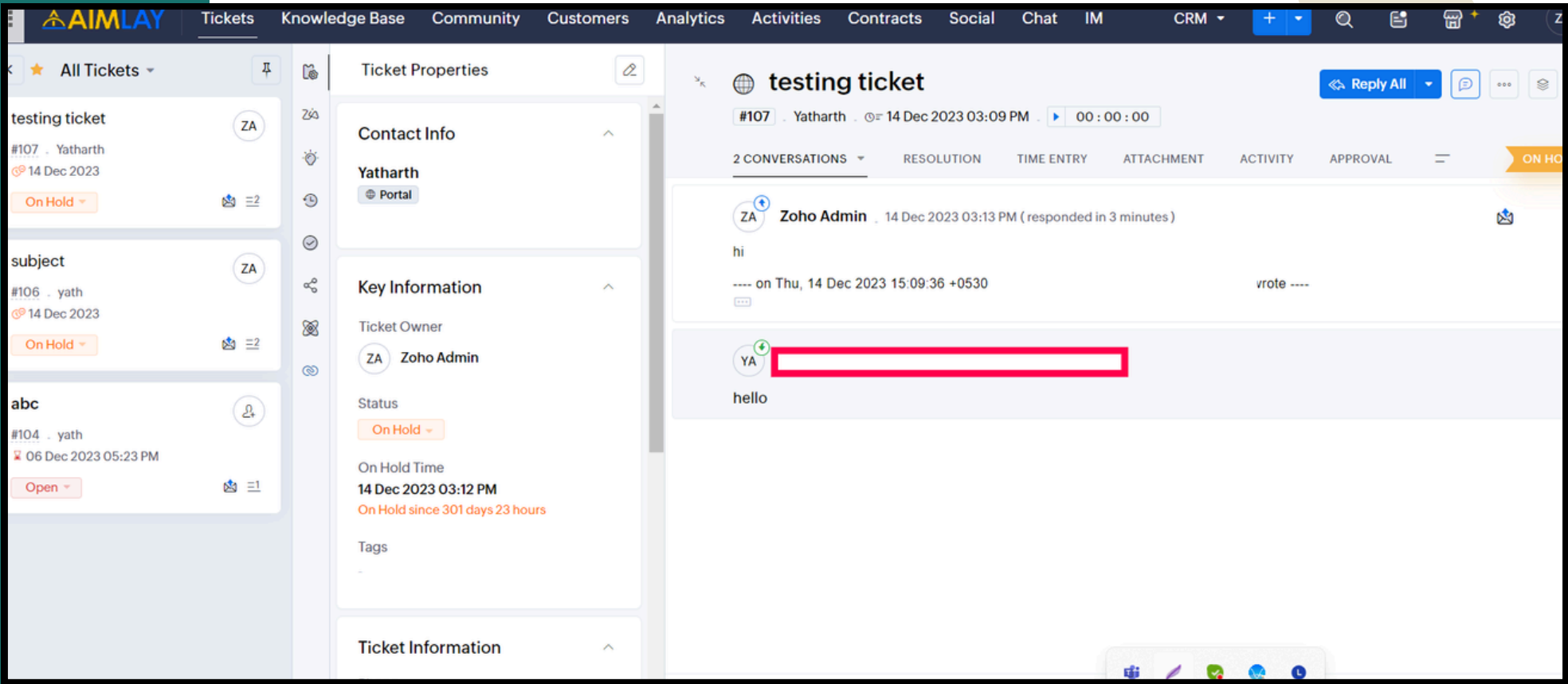


The screenshot displays a CRM interface with a top navigation bar containing links for CRM, All Tabs, Home, Lead, Contact, Opportunity, Calls, Reports, Analytics, and a search icon. Below the navigation bar, there's a sidebar on the left with a filter menu. The main area shows a table of leads with columns for Created Time, Mobile, Lead Status, Lead Name, and Lead Owner. The table is filtered to show 100 records per page, with a total of 69,389 records. The filter menu on the left is highlighted with a red box, showing 'Saved Filters' and 'System Defined Filters'. The 'Saved Filters' list includes: Transferred To Couns... (1), Mistake Folder (4), Owner is sahil (96), Service is empty (10), Empty IVR Number (4), and Empty TAT Status - Of... (462). The 'System Defined Filters' list includes: Touched Records, Untouched Records, Record Action, Related Records Action, Scoring Rules, and Locked. The table data shows leads with 'Fresh Lead (Step 1)' status, all owned by 'ZOHO Admin Desk'. A tooltip at the bottom right says 'Press the "Print Scrn" or screenshot'.

|                          | Created Time        | Mobile | Lead Status         | Lead Name | Lead Owner      |
|--------------------------|---------------------|--------|---------------------|-----------|-----------------|
| <input type="checkbox"/> | 11/10/2024 02:47 PM | 1      | Fresh Lead (Step 1) |           | ZOHO Admin Desk |
| <input type="checkbox"/> | 11/10/2024 02:39 PM |        | Fresh Lead (Step 1) |           | ZOHO Admin Desk |
| <input type="checkbox"/> | 11/10/2024 02:50 PM |        | Fresh Lead (Step 1) |           | ZOHO Admin Desk |
| <input type="checkbox"/> | 11/10/2024 02:50 PM |        | Fresh Lead (Step 1) |           | ZOHO Admin Desk |
| <input type="checkbox"/> | 11/10/2024 02:47 PM |        | Fresh Lead (Step 1) |           | ZOHO Admin Desk |
| <input type="checkbox"/> | 11/10/2024 02:42 PM |        | Fresh Lead (Step 1) |           | ZOHO Admin Desk |
| <input type="checkbox"/> | 11/10/2024 02:42 PM |        | Fresh Lead (Step 1) |           | ZOHO Admin Desk |
| <input type="checkbox"/> | 11/10/2024 02:30 PM |        | Fresh Lead (Step 1) |           | ZOHO Admin Desk |
| <input type="checkbox"/> | 11/10/2024 02:38 PM |        | Fresh Lead (Step 1) |           | ZOHO Admin Desk |
| <input type="checkbox"/> | 11/10/2024 02:37 PM |        | Fresh Lead (Step 1) |           | ZOHO Admin Desk |
| <input type="checkbox"/> | 11/10/2024 02:33 PM |        | Fresh Lead (Step 1) |           | ZOHO Admin Desk |

# ZOHO DESK

- Ticket Module Creation: A robust ticketing system was developed, enabling customers to easily create and close tickets directly within the platform.



The screenshot displays the Zoho CRM Reports dashboard. The left sidebar shows a list of folders, including 'All Reports', 'My Reports', 'Favorites', 'Recently Viewed', 'Shared Reports', 'Scheduled Reports', 'Recently Deleted', 'B2B Account and Contact Rep...', 'Opportunity Reports', 'Lead Reports', 'Campaign Reports', 'Ticket and Solution Reports', 'Product Reports', and 'RSD Writer Reports'. The main area shows a table of reports.

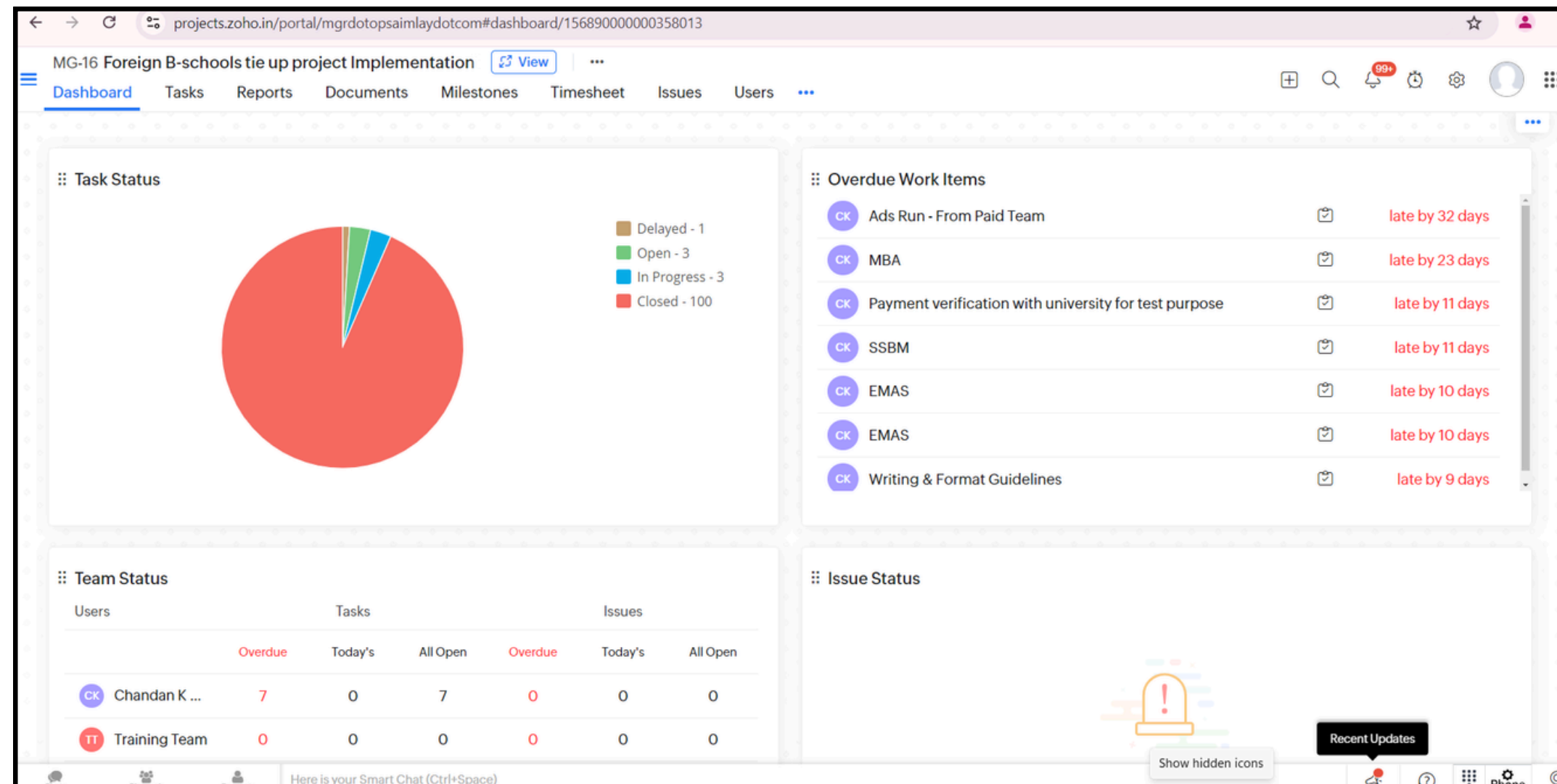
| Report Name  | Description          | Folder            | Last Accessed Date | Created By      |
|--|----------------------|-------------------|--------------------|-----------------|
| <input type="checkbox"/> <a href="#">Book Sale ID</a>                                | To Cross check Sales | MIS Marketing PMS | 15 min ago         | MIS Team        |
| <input type="checkbox"/> <a href="#">FOR LMS</a>                                     | -                    | Audit Custom      | 1 hr ago           | Audit Desk      |
| <input type="checkbox"/> <a href="#">Untitled</a>                                    | -                    | Audit Custom      | 1 hr ago           | Audit Desk      |
| <input type="checkbox"/> <a href="#">Yesterday Paid Leads</a>                        | For Paid Leads PMS   | MIS Marketing PMS | 2 hrs ago          | MIS Team        |
| <input type="checkbox"/> <a href="#">Yesterday's Fresh Paid Lead Assigned</a>        | For Paid Lead PMS    | MIS Marketing PMS | 2 hrs ago          | MIS Team        |
| <input type="checkbox"/> <a href="#">Total Assigned Paid Lead</a>                    | For Paid Lead PMS    | MIS Marketing PMS | 2 hrs ago          | MIS Team        |
| <input type="checkbox"/> <a href="#">Total Assigned Organic Lead</a>                 | For Organic PMS      | MIS Marketing PMS | 2 hrs ago          | MIS Team        |
| <input type="checkbox"/> <a href="#">Overall AR after invoice_Cloned</a>             | -                    | Audit Custom      | 3 hrs ago          | Audit Desk      |
| <input type="checkbox"/> <a href="#">Yesterday's Fresh Organic Lead Assigned</a>     | For Ayush Shukla PMS | MIS Marketing PMS | 3 hrs ago          | MIS Team        |
| <input type="checkbox"/> <a href="#">Yesterday Organic Leads</a>                     | For Ayush Shukla PMS | MIS Marketing PMS | 3 hrs ago          | MIS Team        |
| <input type="checkbox"/> <a href="#">Accounts Collectable Report</a>                 | -                    | VM Dashboard      | 3 hrs ago          | ZOHO Admin Desk |
| <input type="checkbox"/> <a href="#">proposal level</a>                              | -                    | Audit Custom      | 3 hrs ago          | Audit Desk      |
| <input type="checkbox"/> <a href="#">Shakeel Sir Assigning History - Monthly ...</a> | -                    | RSD               | 3 hrs ago          | ZOHO Admin Desk |

- Dashboard Setup: A dashboard was designed for super admins to monitor key ticket metrics, including creation rates, closure statistics, and priority levels.



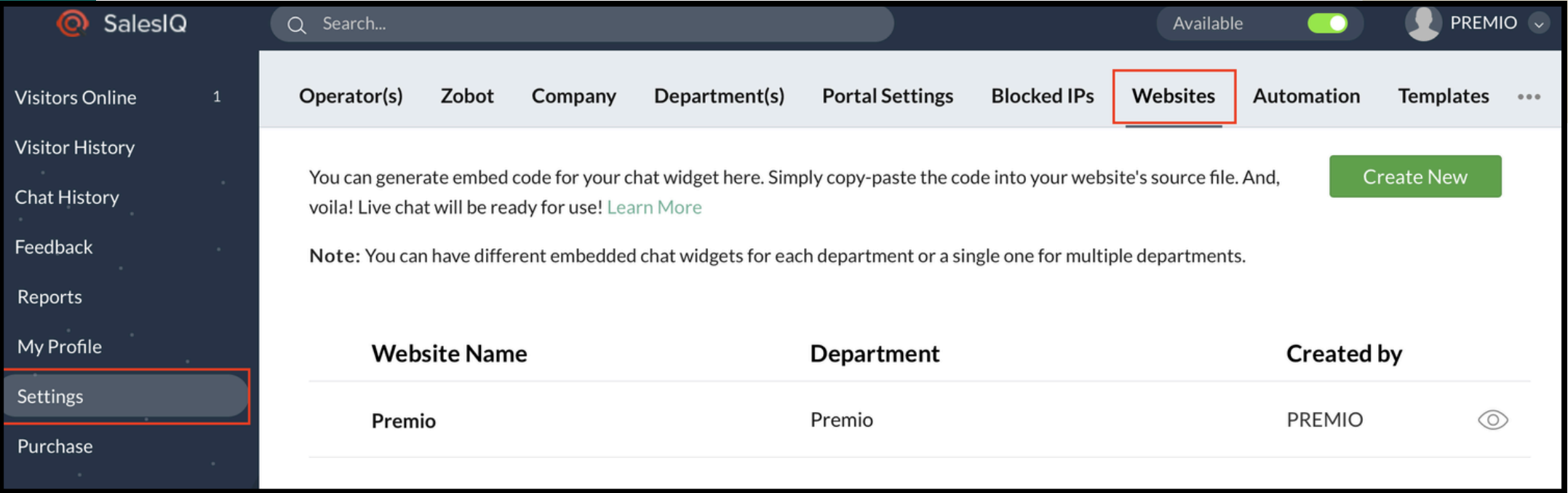
# ZOHO PROJECTS

- Home Page and Analytics: Developed a home page featuring analytics tools for effective project tracking and performance monitoring.
- Approval Processes: Established workflows and approval processes to effectively manage project stages and enhance operational efficiency.



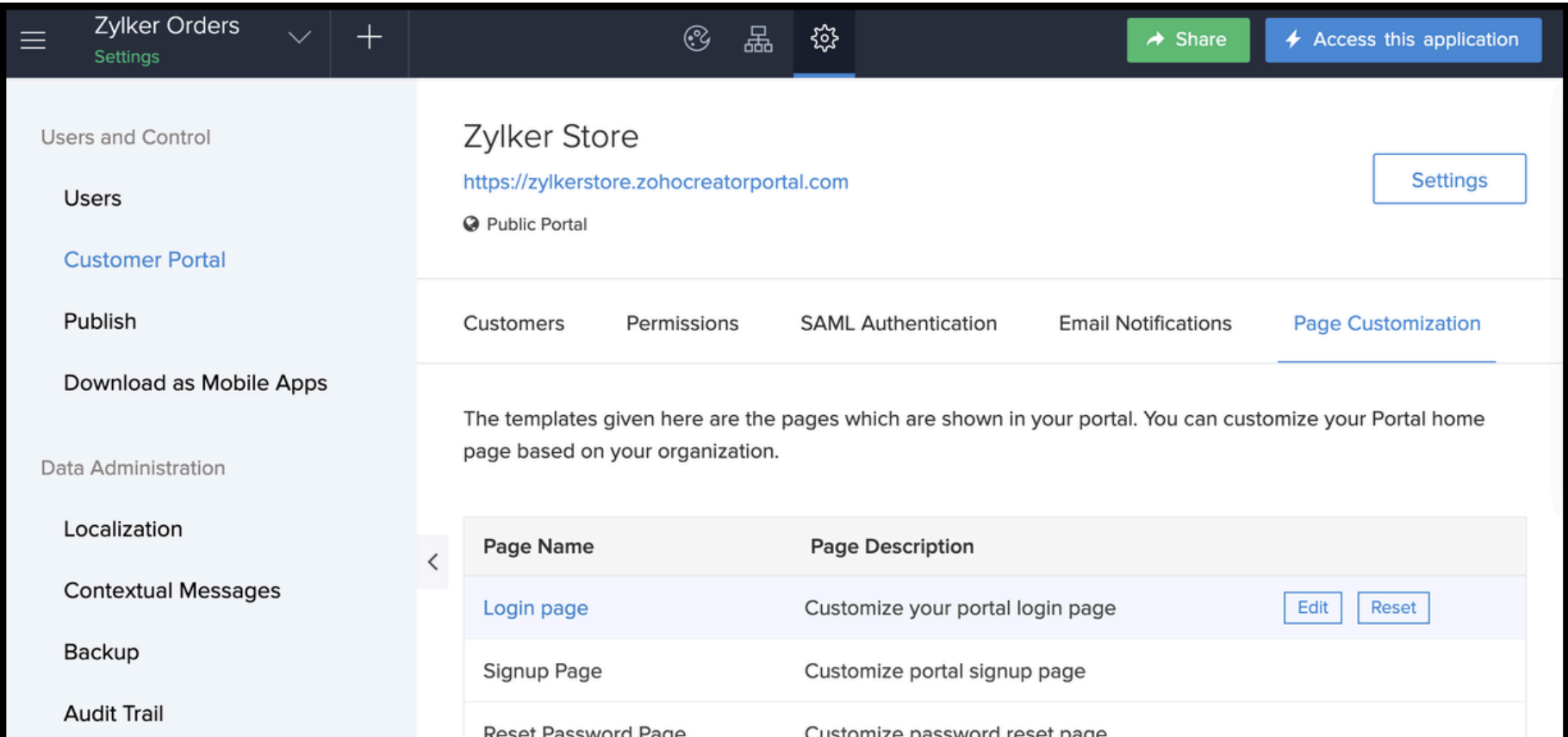
# CUSTOMER ENGAGEMENT (ZOHU SALESIQ)

- Live Chatbot: Created and integrated a live chatbot on the website that automatically captures leads from customer interactions.



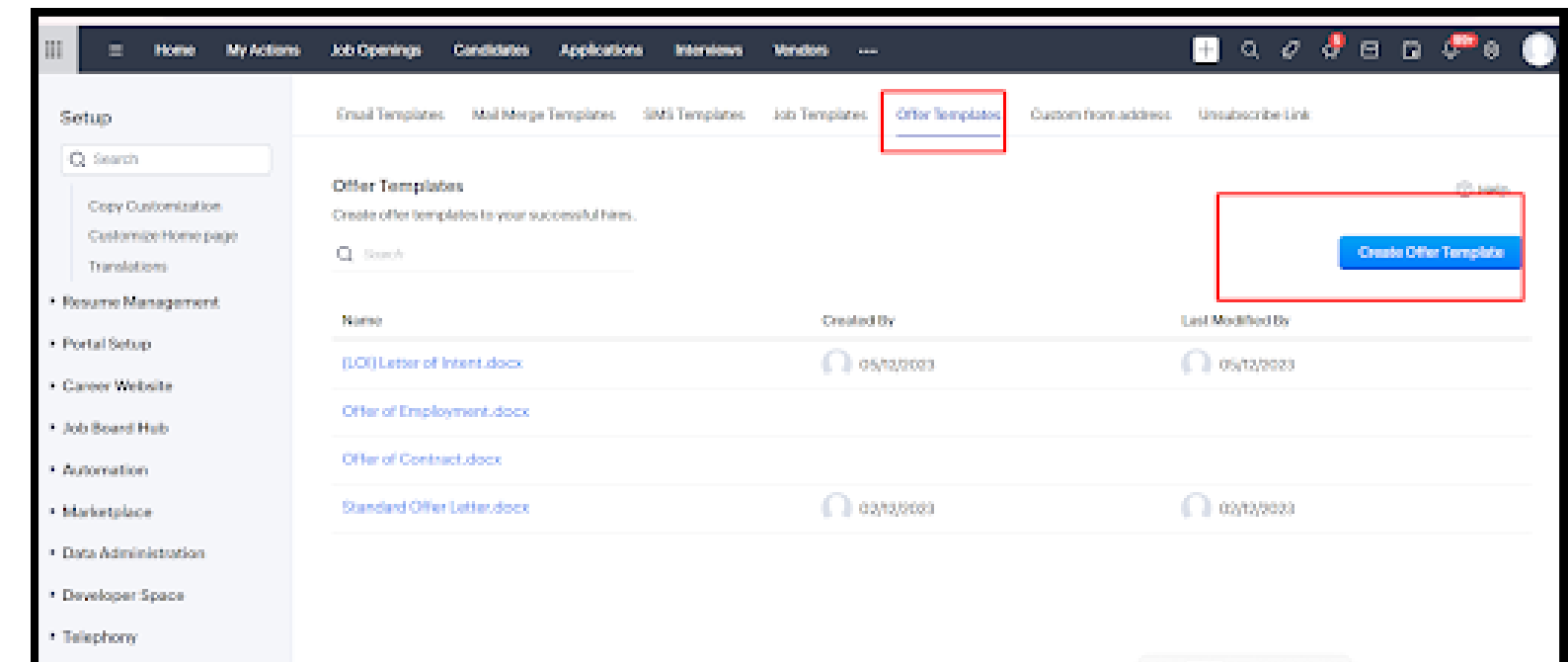
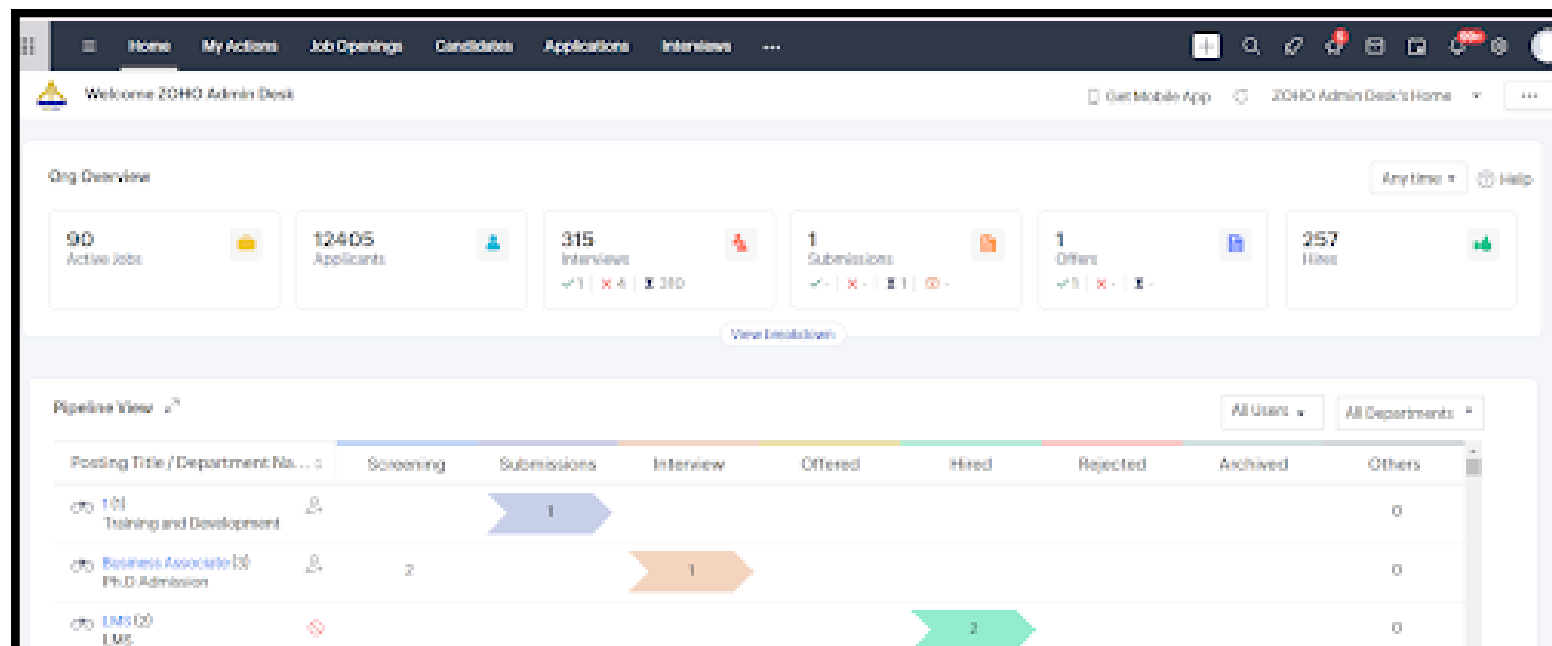
# ZOHO CREATOR

- Custom Applications: Developed tailored applications to meet Aimlay's specific needs, including features for a customer portal and user management.



# ZOHO RECRUIT

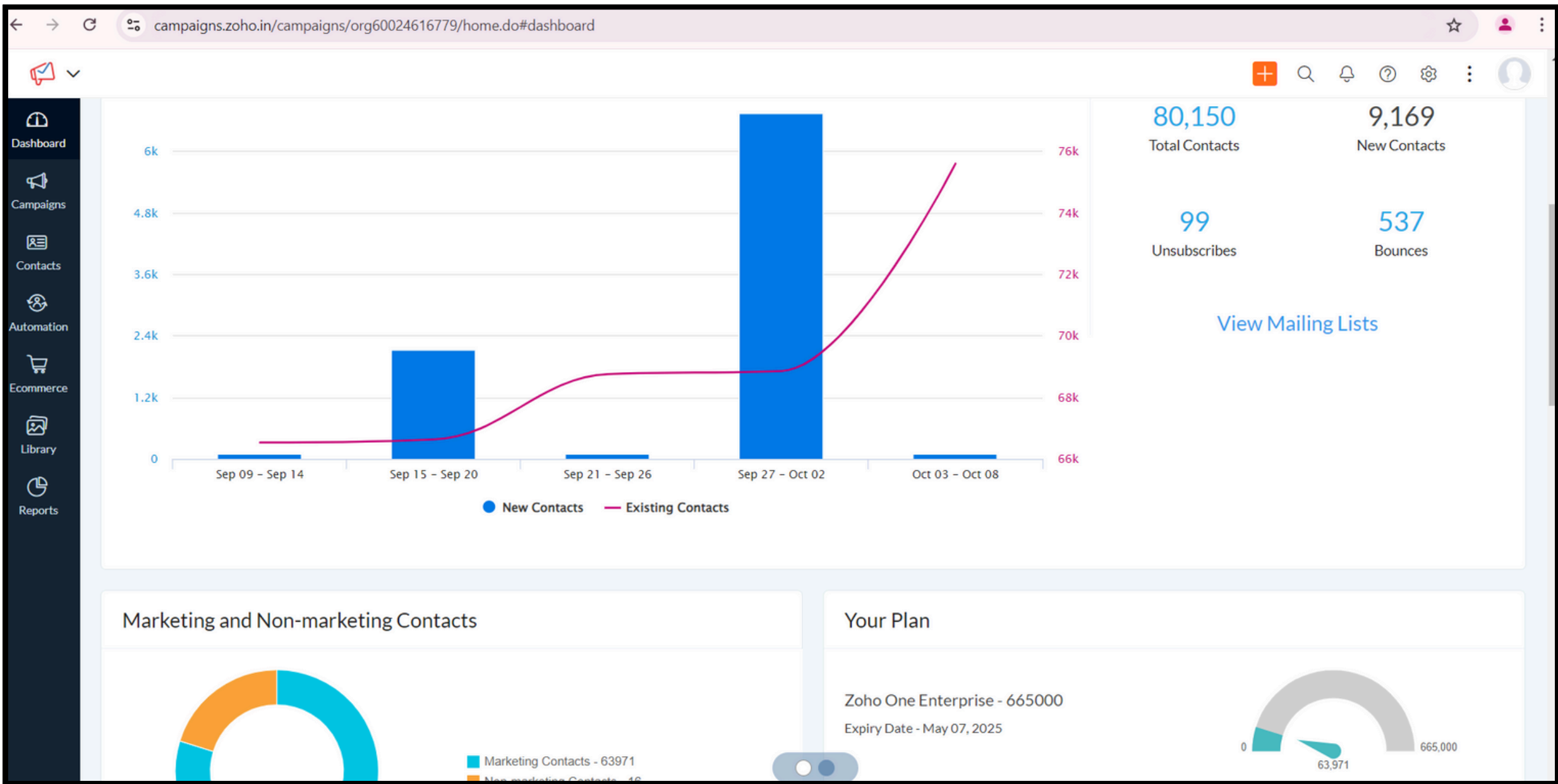
- Hiring Pipeline: Established a hiring pipeline that incorporates workflow rules, approvals, and scheduling to streamline the interview process.





# ZOHO CAMPAIGNS

- Email Campaigns: Developed automated email campaigns to enhance customer engagement and nurture leads. These campaigns use targeted messaging for specific audience segments, ensuring relevance. Automation enables consistent outreach, engagement tracking, and performance optimization,

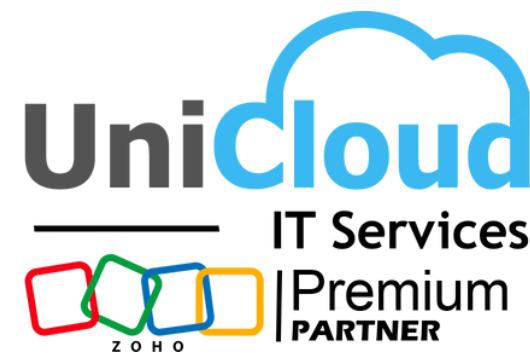


# CONCLUSION

In conclusion, the project successfully transformed Aimlay's operations through the implementation of a robust and integrated suite of Zoho solutions tailored to their specific needs. By addressing challenges such as change management and resource limitations, we created a cohesive system that enhanced efficiency, improved customer engagement, and facilitated better data management. The integration of various functionalities—from CRM and project management to recruitment and marketing—empowered Aimlay to operate more effectively and respond quickly to customer demands. This collaborative effort not only achieved the immediate project goals but also positioned Aimlay for sustained growth and success in the future.

# 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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<https://www.uniclouditservices.com/>