



Client Name: Vishal Country: India Total user: 140 Subscription: ZOHO One





## **ABOUT AIMLAY**

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**

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**

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.

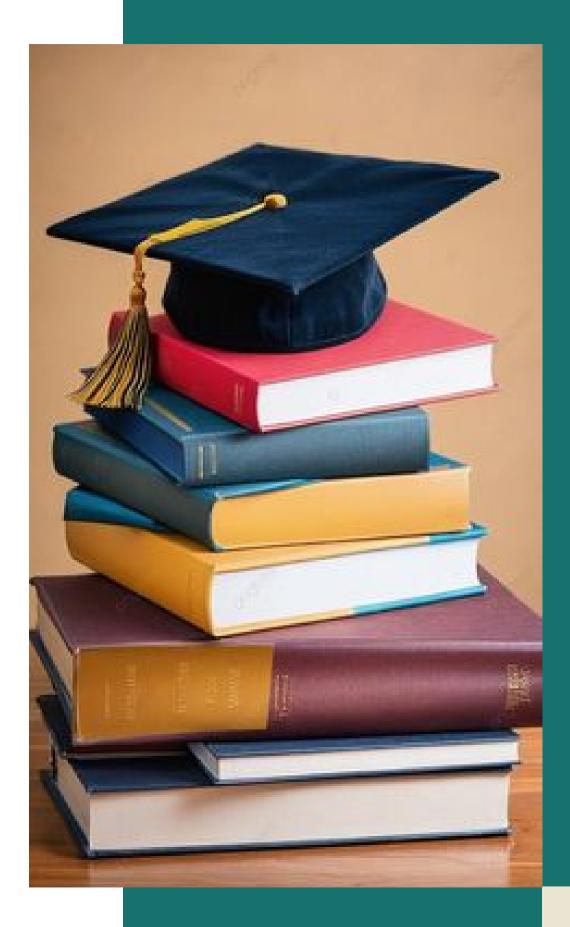




## CHALLENGES

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.

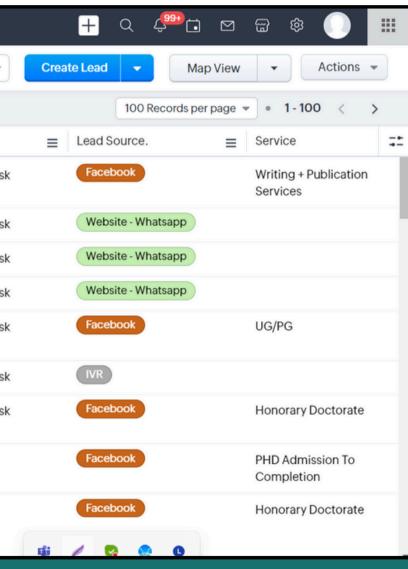


# **FUNCTIONALITY AND FEATURES**

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

| © CRM All Tabs → Home                      | Lead | Contact | Opportunity | Calls                | Reports     | Analytics |                            |           |
|--|------|---------|-------------|----------------------|-------------|-----------|----------------------------|-----------|
| All Lead 👻                                 |      |         |             |                      |             |           | Q Search Modules           |           |
|  |      |         |             |                      |             |           | SalesInbox                 | A         |
| Total Records 69384                        |      |         |             |                      |             |           | Campaigns                  |           |
| → Saved Filters     8                      |      |         |             | Lead Stat            | us          | ≡ Lead    |                            | ər        |
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| Mistake Folder 4                           |      |         |             | Freshle              | ad (Step 1) | sonip     | Documents                  | nin Desl  |
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| Empty TAT Status - Of 462                  |      |         |             |                      |             |           | Google Ads                 |           |
|  | •    |         |             | Fresh Le             | ad (Step 1) | Wahi      |                            | nin Desl  |
| Filter Lead by                             |      |         |             |                      |             |           | Payment Receipts           |           |
| Q Search                                   |      |         |             | Fresh Le             | ad (Step 1) | Sir/M     |                            | nin Desl  |
| <ul> <li>System Defined Filters</li> </ul> |      |         |             | Fresh Le             | ad (Step 1) | sunitl    | LeadChain<br>SMS Templates | nin Desl  |
| Touched Records                            |      |         |             |                      |             |           | CommandCenter              |           |
| Untouched Records                          |      |         |             | Lead Los             | st          | Sang      | SMS History                | dha       |
| Record Action                              |      |         |             |                      |             |           | Writing and Publication    | _         |
| Related Records Action                     |      | 9       | TODAY       | Not Able<br>(Step 3) | To Connect  | Math      | + Create New Module        | a         |
| Scoring Rules                              |      |         |             | (orop of             |             |           |                            |           |

• 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    | Ana | lytics |   |     |   |                         |
|--|------|---------|-------------|------------|------------|-----|--------|---|-----|---|-------------------------|
| √ All Lead   |      |         |             |            |            |     |        |   |     |   |                         |
| otal Records 69384   |      |         |             |            |            |     |        |   |     |   |                         |
| Saved Filters 8  |      |         |             | Created Ti | me         | ≡   | Mobile | • |     | ≡ | Lead Status             |
| Transfered To Couns 1<br>Mistake Folder 4                      | ^    |         | C TODAY     | 11/10/2024 | 4 01:29 PM |     |        |   | 5 🕓 |   | Not Able To<br>(Step 3) |
| Owner is sahil 92  |      |         |             | 11/10/2024 | 4 01:57 PM |     |        |   | S   |   | Fresh Lead (            |
| Service is empty 10<br>Empty IVR Number 4                      |      |         | C TODAY     | 11/10/2024 | 4 01:56 PM |     |        |   |     |   | Not Able To<br>(Step 3) |
| Empty TAT Status - Of 462                                      | -    |         |             | 11/10/2024 | 4 02:38 PM |     |        |   |     |   | Fresh Lead (            |
| ilter Lead by  |      |         |             | 11/10/2024 | 4 02:33 PM |     |        |   | S   |   | Fresh Lead (            |
| Q Search   |      |         |             | 11/10/2024 | 1 02:29 PM |     |        |   |     |   | Fresh Lead (            |
| System Defined Filters   |      |         |             |            |            |     |        |   |     |   |                         |
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| Untouched Records  |      |         |             | 11/10/2024 | 4 01:31 PM |     |        |   | ) 🕓 |   | Lead Lost               |
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| Scoring Rules  |      |         |             |            |            |     |        |   |     |   |                         |

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

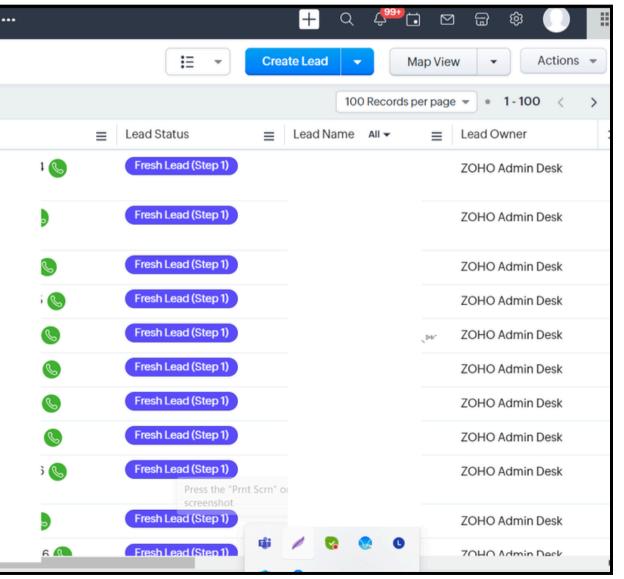
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| d (Step 1)  |     |          |         |                 |         |          |        |      |
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| o Connect   |     |          |         |                 |         |          |        |      |
|             |     |          |         |                 |         |          |        |      |

## **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

| CRM All Tabs   Home   | Lead | Contact | Opportunity | Calls     | Reports    | Ana | lytics • |
|---|------|---------|-------------|-----------|------------|-----|----------|
| ✓   All Lead ▼  |      |         |             |           |            |     |          |
| Total Records 69389   |      |         |             |           |            |     |          |
| ✓ Saved Filters 8   |      |         |             | Created T | ime        | ≡   | Mobile   |
| Transfered To Couns 1   | ^    |         |             | 11/10/202 | 4 02:47 PM |     |          |
| Mistake Folder 4<br>Owner is sahil 96                             |      |         |             | 11/10/202 | 4 02:39 PM |     |          |
| Service is empty 10<br>Empty IVR Number 4                         |      |         |             | 11/10/202 | 4 02:50 PM |     |          |
| Empty TAT Status - Of 462   | Ţ    |         |             | 11/10/202 | 4 02:50 PM |     |          |
| Filter Lead by  |      |         |             | 11/10/202 | 4 02:47 PM |     |          |
| Q Search  |      |         |             | 11/10/202 | 4 02:42 PM |     |          |
| ✓ System Defined Filters  |      |         |             | 11/10/202 | 4 02:42 PM |     |          |
| Touched Records   |      |         |             | 11/10/202 | 4 02:30 PM |     |          |
| <ul> <li>Untouched Records</li> <li>Record Action</li> </ul>      |      |         |             | 11/10/202 | 4 02:38 PM |     |          |
| <ul> <li>Related Records Action</li> <li>Scoring Rules</li> </ul> |      |         |             | 11/10/202 | 4 02:37 PM |     |          |
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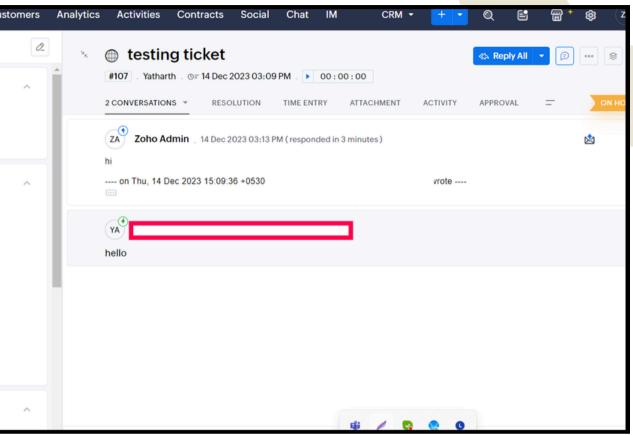
## **ZOHO DESK**

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

|   | Tickets                                   | Knowle         | edge Base                    | Community  | Cust |  |  |
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| 🖈 🔺 All Tickets 👻   | д   |                | Ticket F                     | Properties   |      |  |  |
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| subject<br>#106 - yath<br>@ 14 Dec 2023<br>On Hold ~            | ZA<br>🖄 ==2                               | ©<br>*<br>®    | Ticket Ov                    | Key Information<br>Ticket Owner<br>ZA Zoho Admin                                   |      |  |  |
| abc<br>#104 - yath<br>≆ 06 Dec 2023 05:23 PM<br>Open ▼          | yath<br>ec 2023 05:23 PM On<br>고  철 트 144 |                | On Hold                      | tus<br>Dn Hold -<br>Hold Time<br>Dec 2023 03:12 PM<br>Hold since 301 days 23 hours |      |  |  |
|   |   |                | Tags<br>Ticket I             | nformation   |      |  |  |

| CRM All Tabs - Home                           | Lead Contact Opportunity Calls Reports  | Analytics •••        | Ŧ                 | Q 400 🔁 🗖            | 📾 🕸 🕕 🔳                   |
|---|---|----------------------|-------------------|----------------------|---------------------------|
| Folders                                       | All Reports                             | Q. Search All R      | eports Crea       |                      | Analytics for Zoho CRM (? |
| Q Search Folder                               | Report Name                             | Description          | Folder            | Last Accessed Date 👻 | Created By                |
| II Reports                                    | □★ Book Sale ID                         | To Cross check Sales | MIS Marketing PMS | 15 min ago           | MIS Team                  |
| ly Reports                                    | □ ★ FOR LMS                             |                      | Audit Custom      | 1 hr ago             | Audit Desk                |
| avorites                                      | □★ Untitled                             |                      | Audit Custom      | 1 hr ago             | Audit Desk                |
| ecently Viewed                                | ☐★ Yesterday Paid Leads                 | For Paid Leads PMS   | MIS Marketing PMS | 2 hrs ago            | MIS Team                  |
| hared Reports                                 | ☐★ Yesterday's Fresh Paid Lead Assigned | For Paid Lead PMS    | MIS Marketing PMS | 2 hrs ago            | MIS Team                  |
| cheduled Reports                              | ☐★ Total Assigned Paid Lead             | For Paid Lead PMS    | MIS Marketing PMS | 2 hrs ago            | MIS Team                  |
| ecently Deleted                               | ☐★ Total Assigned Organic Lead          | For Organic PMS      | MIS Marketing PMS | 2 hrs ago            | MIS Team                  |
| 2B Account and Contact Rep pportunity Reports | Overall AR after invoice_Cloned         |                      | Audit Custom      | 3 hrs ago            | Audit Desk                |
| ead Reports                                   |   | For Ayush Shukla PMS | MIS Marketing PMS | 3 hrs ago            | MIS Team                  |
| ampaign Reports                               | ☐★ Yesterday Organic Leads              | For Ayush Shukla PMS | MIS Marketing PMS | 3 hrs ago            | MIS Team                  |
| icket and Solution Reports                    |   |                      | VM Dashboard      | 3 hrs ago            | ZOHO Admin Desk           |
| roduct Reports                                | ☐★ proposal level                       |                      | Audit Custom      | 3 hrs ago            | Audit Desk                |
| SD Writer Reports                             | Shakeel Sir Assigning History - Monthly |                      | RSD               | 3 hrs ago            | ZOHO Admin Desk           |

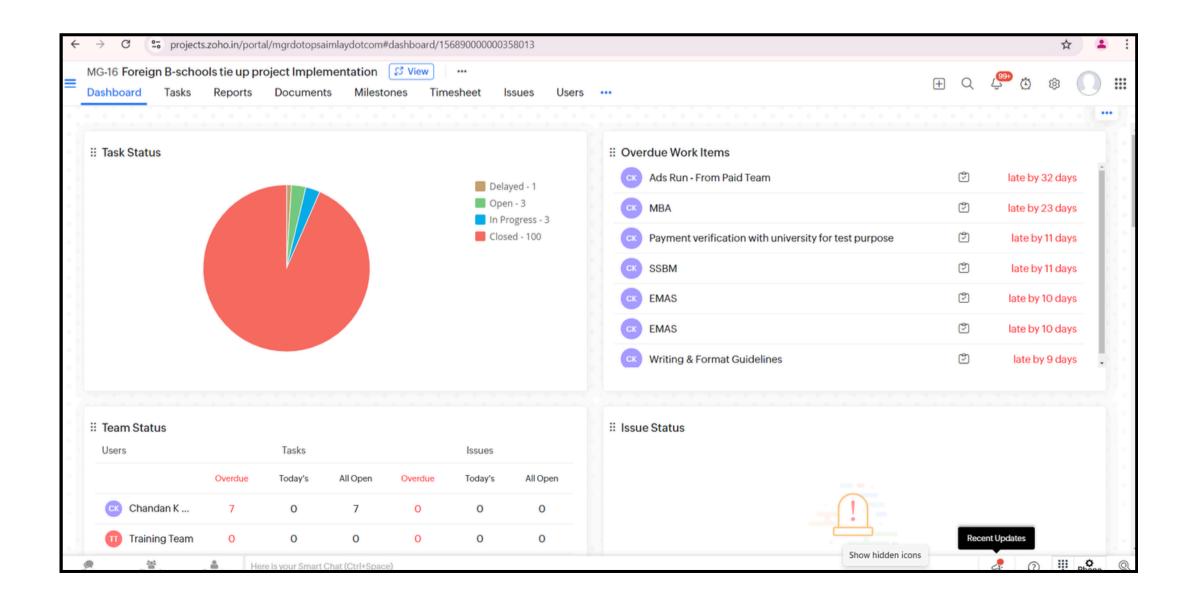
priority levels.



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

## **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 (ZOHO SALESIQ)

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

| 🔘 SalesIQ                                   |   | Q Search   |          |         |               |                 | Availab     | Available 💽 |            |           |           |  |
|---|---|--|----------|---------|---------------|-----------------|-------------|-------------|------------|-----------|-----------|--|
| Visitors Online                             | 1 | Operator(s)  | Zobot    | Company | Department(s) | Portal Settings | Blocked IPs | Websites    | Automation | Templates | •••       |  |
| Visitor History<br>Chat History<br>Feedback |   | You can generate embed code for your chat widget here. Simply copy-paste the code into your website's source file. And, Create New voila! Live chat will be ready for use! Learn More Note: You can have different embedded chat widgets for each department or a single one for multiple departments. |          |         |               |                 |             |             |            |           |           |  |
| Reports<br>My Profile                       |   | Web  | site Nam | e       |               | Department      |             |             | Created    | by        |           |  |
| Settings<br>Purchase                        | • | Premi  | io       |         |               | Premio          |             |             | PREMIO     | C         | $\supset$ |  |

### **ZOHO CREATOR**

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

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| Users<br>Customer Portal  |   | Public Po |
| Publish   |   | Customer  |
| Download as Mobile Apps   |   | The templ |
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| Contextual Messages   |   | Login pa  |
| Backup  |   | Signup    |
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|--------------------------------|----------------------------|----------|-------------|-----------------------|---------------------------|---|
| r Store<br>Ikerstore<br>Portal | e<br>e.zohocreat           | torporta | al.com      |                       |                           | Settings                                    |
| rs                             | Permission                 | IS       | SAML        | Authentication        | Email Notifications       | Page Customization                          |
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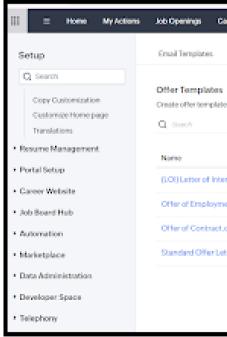
Customize password reset page

Password Page

## **ZOHO RECRUIT**

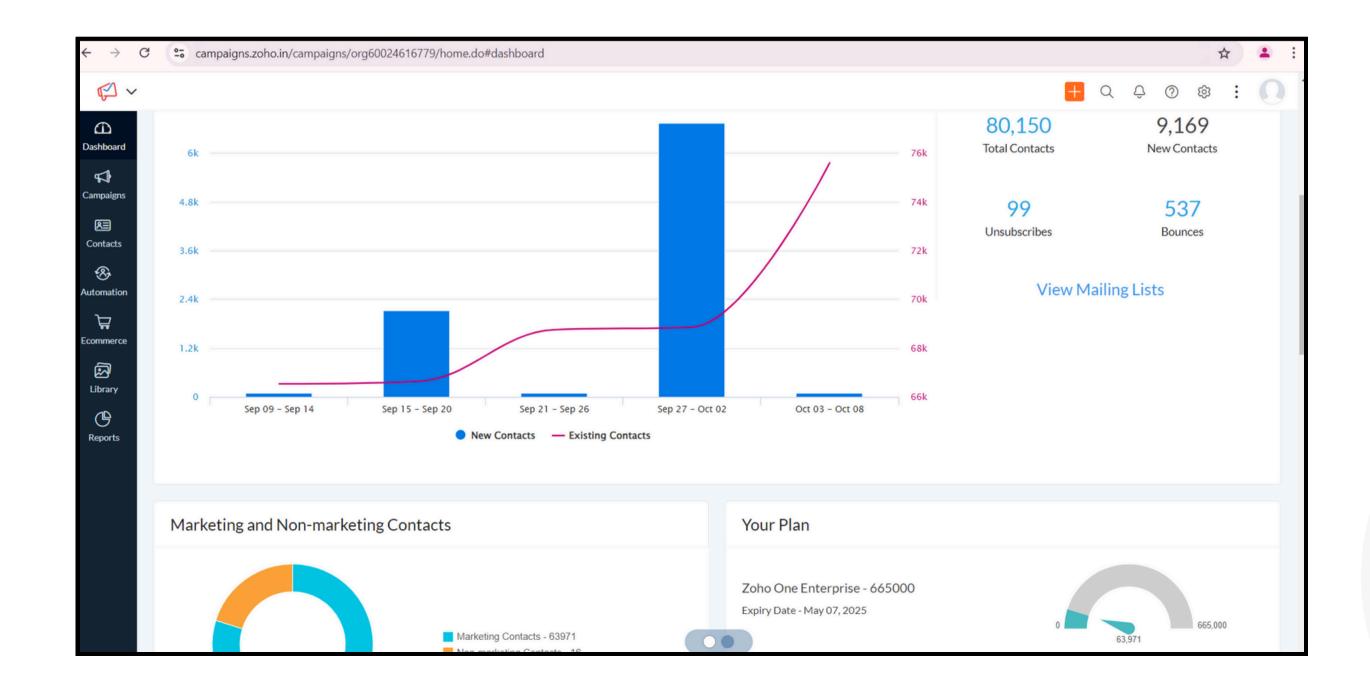
• Hiring Pipeline: Established a hiring pipeline that incorporates workflow rules, approvals, and scheduling to streamline the interview process.

| E Home My A                               | ctions Job Opi                           | mings Candidates | Applications                  | Interniews |                                    |       |                               | <u>+</u> د د | 7 🕹 🖯 🖬              | ۰ ه جي   |
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| Pipeline View 2 <sup>3</sup>              |  |                  |                               |            |                                    |       |                               | Altums       | All Department       | a +      |
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| (7) Business Associate(<br>Ph.D.Admission | 19 <u>B</u>                              | 2                |                               |            |                                    |       |                               |              | o                    |          |
|   | \$                                       |                  |                               |            |                                    | 2     | •                             |              | 0                    |          |



| Candidates Application       | o Interniews   | Verators      | 🗄 Q 🖉 🖗 E                           | i 🗆 🐥 e 🔵 |
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|                              |                |               |                                     |           |

### **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.



https://www.uniclouditservices.com/