HOUSE OF SYLAS DJEVA

Client Name: Eric Bardawil

Country: USA

Total user: 1

Subscription: ZOHO One

ABOUT

House of Sylas is a lapidary and stone-setting workshop located in sunny Santa Barbara, California. Specializing in the manufacturing of synthetic gemstones and titanium, the company is dedicated to quality and craftsmanship. House of Sylas offers a unique experience, allowing customers to commission personalized gems that reflect their individual visions. With a knowledgeable team committed to gemology, clients receive expert guidance and tailored service throughout their journey, ensuring a seamless transition from concept to creation in the jewelry and gemstones industry.

PROJECT OVERVIEW

The project aimed to create a unified and automated system integrating Shopify with Zoho CRM, Zoho Books, Zoho Inventory, Zoho Campaigns, Zoho Analytics, and Zoho Flow. By optimizing business operations, the integration sought to enhance reporting capabilities and ensure accurate data flow across all platforms.

PROJECT OBJECTIVE

Our objective was to automate the synchronization of customer and product data between Shopify and Zoho platforms for House of Sylas. This initiative aimed to enhance order processing and invoicing, significantly minimizing manual intervention. By implementing real-time notifications and improved reporting capabilities, the project sought to elevate operational efficiency and provide greater visibility into business performance, ultimately creating a more effective workflow.

CHALLENGES

During this project, we encountered several challenges that required our keen attention while enhancing House of Sylas's integration and ensuring connectivity among various systems. Key issues included maintaining data integrity during synchronization, efficiently importing historical data without disrupting existing workflows, and designing user-friendly interfaces to improve usability in Zoho CRM. Additionally, ensuring consistent updates across multiple platforms presented operational hurdles, requiring careful planning and execution to align all systems effectively.

SOLUTIONS

To address the challenges faced, a structured integration plan was developed, outlining specific tasks for Zoho CRM, Zoho Campaigns, Zoho Analytics, Zoho Books, and Zoho Inventory. The integration of Zoho CRM with Shopify, Zoho Books, Zoho Inventory, and Zoho Campaigns established an automated system for synchronizing customer data, product listings, and orders. Key features included real-time payment notifications via Zoho Cliq, importing historical data, creating custom fields, and utilizing Zoho Analytics for enhanced reporting. This robust setup not only improved operational efficiency but also ensured accurate data management and provided greater insights into sales performance, ultimately supporting informed business decisions and driving growth for House of Sylas.

FUNCTIONALITY & FEATURES

ZOHO CRM INTEGRATION

Flow Setup for Shopify Orders, Products , Customers
Automating the synchronization of Shopify customers, products, and orders with Zoho   CRM. This ensured that all new Shopify customers were automatically created as contacts, product listings appeared in Zoho CRM's products module with complete details, and Zoho CRM invoices were generated for every Shopify order.

Real-Time Payment Notification
The integration included a real-time notification system that sends a message to a designated Zoho Cliq channel whenever an invoice is marked as paid in Zoho CRM. This feature ensures that team members are promptly informed of payment statuses

Data Import from Shopify to Zoho CRM
This process focuses on importing historical data, encompassing products, contacts, and orders from Shopify into Zoho CRM. This ensure that all previous records from Shopify are accessible within Zoho CRM,

Custom Fields Creation in Zoho CRM
Created custom fields to various CRM modules to capture additional data necessary for Shopify synchronization and workflow automation.

Custom Canvas Views for Zoho CRM Modules

For better visualization and usability, custom canvas views were designed for three key Zoho CRM modules:

Products: Organizes product images, stock availability, and descriptions for easy reference.

Contacts: Highlights recent activities, communication history, and other essential details for efficient customer management.

Invoices: Displays crucial invoice data like due dates, payment statuses, and client details, allowing for streamlined financial tracking.
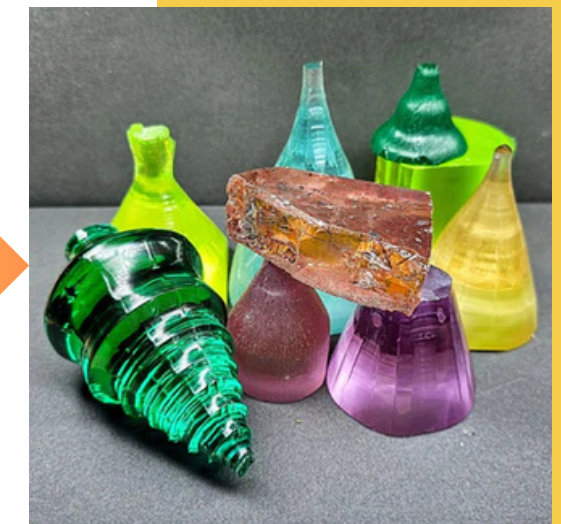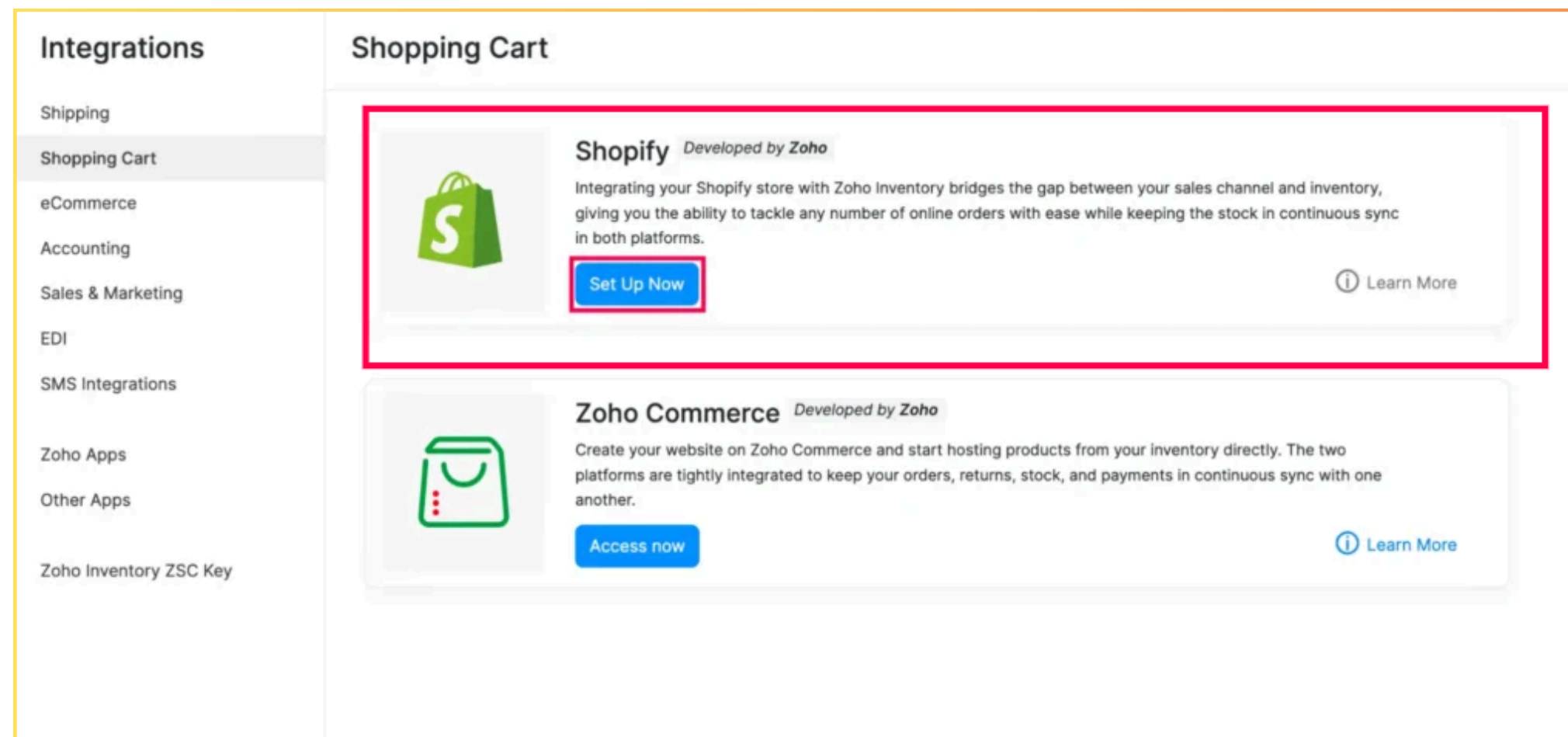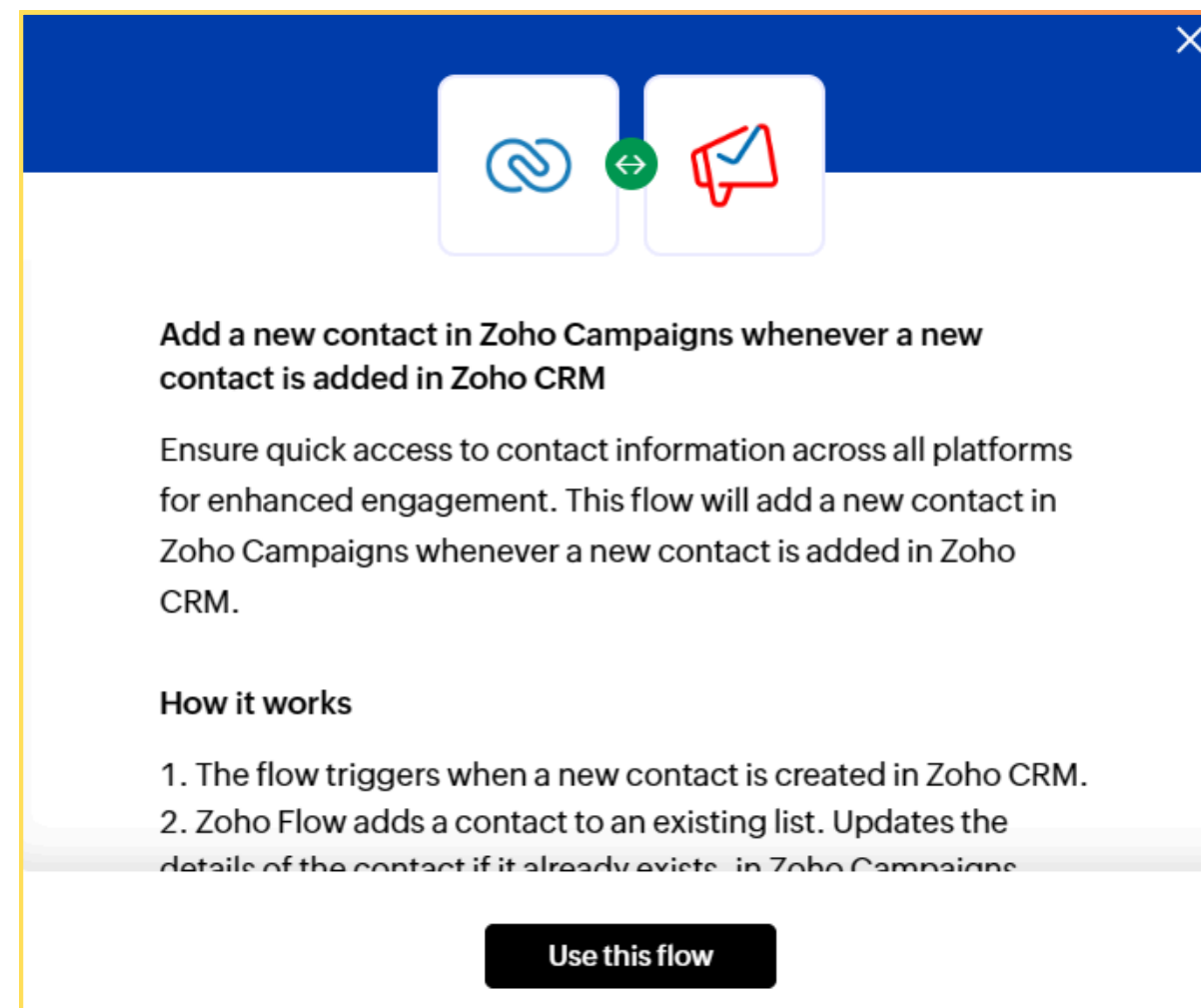
ZOHO CAMPAIGNS INTEGRATION

<u>Zoho CRM contacts were synced with Zoho Campaigns.</u>

This synchronization allows for real-time updates between the two systems, ensuring that contact lists remain consistent and up-to-date

Add a new contact in Zoho Campaigns whenever a new contact is added in Zoho CRM

Ensure quick access to contact information across all platforms for enhanced engagement. This flow will add a new contact in Zoho Campaigns whenever a new contact is added in Zoho CRM.

How it works

1. The flow triggers when a new contact is created in Zoho CRM.
2. Zoho Flow adds a contact to an existing list. Updates the details of the contact if it already exists, in Zoho Campaigns

Use this flow
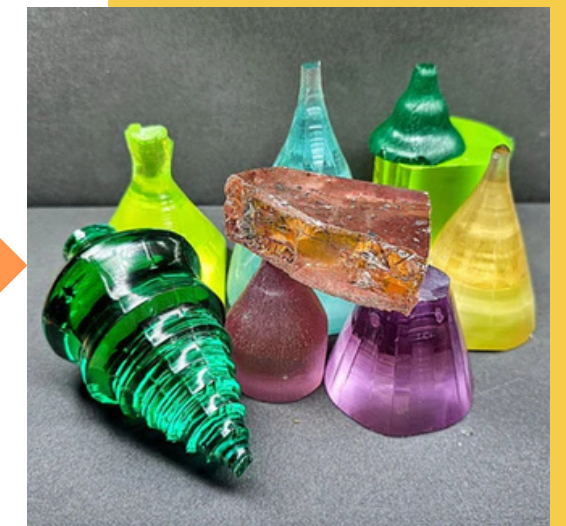
ZOHO ANALYTICS INTEGRATION

Reports were created in Zoho Analytics for tracking sales performance and customer behavior.

These reports included key metrics such as Most Ordered Product, Total Sales by Month, and Least Selling Product to help the business track trends and identify areas for improvement.

Additionally, functionality was added to automatically generate reports on Weekly and Monthly Revenue,

Zoho Analytics Integration

Your integration with Zoho Analytics is up and running. Go ahead and access the workspace in Zoho Analytics to create customized reports. Learn more.

Owned By

Zoho Analytics Plan   **Premium**

Sync Status   Sync successful

Next Sync

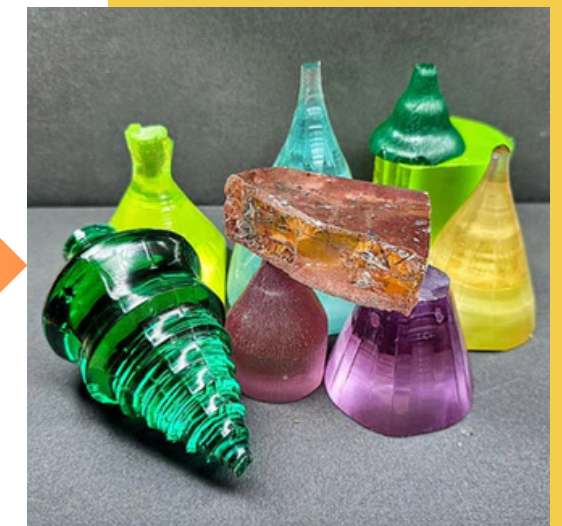Edit Settings | Delete Integration   Access Zoho Analytics

Selected Modules

✓ Accounts   ✓ Items
✓ Contacts   ✓ Invoices

                    ✓ Add-on

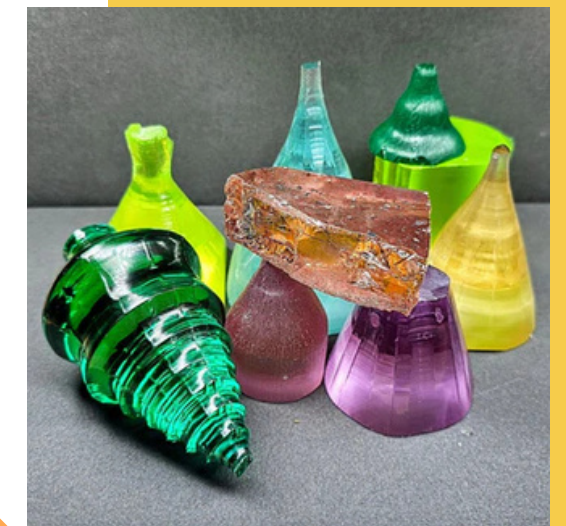   ✓ Online Transactions

ZOHO BOOKS INTEGRATION

- **Sync Zoho Books Customers with Zoho CRM Contacts**: Ensured customer data consistency across accounting and CRM platforms.

- **Sync Zoho Books Items with Zoho CRM Products:** Maintained accurate and up-to-date product information in both systems.

- **Sync Zoho CRM Invoices with Zoho Books Invoices:** Automated the synchronization of invoices between Zoho CRM and Zoho Books, ensuring that financial records were updated promptly for accounting purposes.

ZOHO INVENTORY INTEGRATION

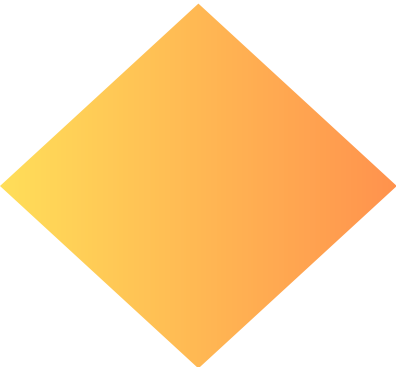**SYNC PRODUCTS BETWEEN SHOPIFY AND ZOHO INVENTORY**

- **Initial Import:** Imported existing Shopify products, including SKUs, descriptions, and pricing, into Zoho Inventory.

- **Ongoing Sync:** Automated synchronization of any new Shopify products with Zoho Inventory.

SYNC ORDERS BETWEEN SHOPIFY AND ZOHO INVENTORY

- **Order Sync**: Automatically created sales orders in Zoho Inventory for each Shopify order, capturing customer details, shipping information, products, taxes, and discounts.

- **Fulfillment Sync:** Updated fulfillment status in Shopify using Zoho Flow once an order was fulfilled in Zoho Inventory.

ZOHO FLOW STRUCTURE FOR SHIPMENT SYNC

- **Trigger:** A shipment is marked as "Shipped" in Zoho Inventory.

- **Actions:**
  - Retrieve shipment details.
  - Optionally retrieve the associated sales order.
  - Create fulfillment details in Shopify.

CONCLUSION

The successful integration of Shopify with multiple Zoho platforms has significantly transformed the operational efficiency of House of Sylas. This integration allowed for the automation of essential workflows, reducing manual tasks and minimizing the risk of errors. As a result, the team can now allocate more time and resources to focus on growth initiatives and enhancing customer satisfaction. This project not only optimized day-to-day operations but also equipped the company with the tools needed to analyze trends and customer behaviors. By fostering a more data-driven approach, House of Sylas is better positioned to adapt to market changes and customer needs, paving the way for future growth and success.
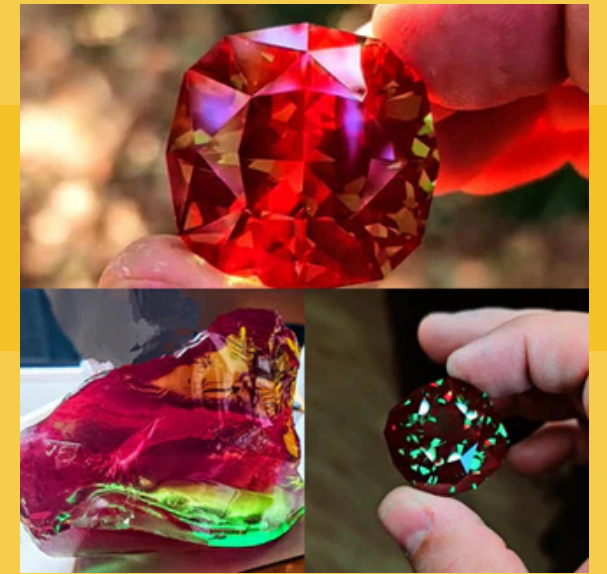
ABOUT US

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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