



Client Name : Christopher Metzler

Country : USA

Users : 22

Subscription : Zoho One



ABOUT

Progressive Electronics Inc. (PEI), founded in 1978 by Navy Veteran Craig Metzler, is a trusted provider of cutting-edge fire alarm, mass notification, audiovisual, and telecommunication systems. With over four decades of industry experience, PEI has established itself as a leader in delivering high-quality solutions across various sectors, including education, healthcare, corporate organizations, property management, the Department of Defense, and entertainment venues. As a family-owned business, PEI is deeply committed to innovation and exceptional customer service, ensuring that every client receives the best possible solutions for their unique needs.




PROJECT OVERVIEW:

PEI needed a comprehensive solution to enhance its internal workflows and project management capabilities, leveraging Zoho CRM and Zoho Projects. The company was looking to improve task management, deal tracking, and communication between teams, ensuring more efficient operations and better project visibility. Customizations were required to automate several processes across Zoho applications, including the creation of service deals, managing project milestones, and integrating CRM and project management systems.

PROJECT OBJECTIVE:

The primary objective of this project was to customize and enhance Zoho CRM and Zoho Projects to better align with the specific needs of PEI's sales and project management teams. This included tailoring page layouts to display only relevant information for the sales team, improving the synchronization of tasks between Zoho CRM and Zoho Projects, and automating workflows to streamline project creation, email notifications, and task management. Additionally, the project aimed to ensure seamless communication and maintain data consistency across the systems, allowing PEI's teams to work more efficiently and effectively.



CHALLENGES:

Before implementing the Zoho CRM and Projects solutions, PEI encountered several challenges that hindered their operations. The sales team was burdened with irrelevant data in the CRM, making it difficult to focus on essential deal information. The change order process was not efficient, as users had to manually scroll through deals to find the relevant data. Additionally, task management and project milestones were not properly synchronized between Zoho CRM and Zoho Projects, leading to delays and communication gaps. Project managers also faced difficulties accessing task and deal data, resulting in inefficiencies in managing both new and ongoing projects. Furthermore, there was no consistent method for tracking project milestones, especially for Fire Alarm projects, which often led to confusion and missed deadlines.





SOLUTIONS:

To address PEI's challenges, customizations and integrations were made in Zoho CRM and Zoho Projects. Irrelevant data was hidden from the sales team, ensuring only essential information was visible. The change order process was streamlined by appending "- Change Order" to deal names and providing direct access to change order pages. Tasks in Zoho Projects were linked to CRM deals, ensuring synchronization between the two systems. Specific milestones for Fire Alarm projects were automatically created to track key stages. Automated email notifications were set up to keep the team updated on deal statuses and project progress.

FEATURES AND FUNCTIONALITIES

1. Zoho CRM Customizations:

Page Layouts:

- Customized page layouts to hide irrelevant data (e.g., Nathan, Corey Projects, Work Drive) that do not apply to the sales team, providing a cleaner and more focused interface.

Change Order:

- Deal Name Convention: Modified the deal naming convention to append “- Change Order” automatically when a change order is created.
- Direct Navigation: Enabled direct access to the change order page upon selection, eliminating the need to scroll through the deal page.
- Consistent Deal Owner: Ensured the deal owner remains consistent with the original deal, addressing the issue where it previously defaulted to a specific user.

The screenshot displays the Zoho CRM interface for a record titled "Dummy Test Today". The page includes a left sidebar with navigation options like "Related List", "Notes", "Invoices", and "Attachments". The main content area shows a form with two tabs: "Overview" (selected) and "Timeline". The "Overview" tab contains a grid of fields. The "Fedex Account No" field, containing the value "ACC8900", and the "Payment Terms" field, containing the value "Net 15", are both highlighted with red rectangular boxes. Other visible fields include "PO Date", "PO Type", "Shipping Type", "UPS Account No", "Outbound Tracking", "Shipped Date", "All Serial Numbers", "Sales Order Owner" (Chase Elam), and "Loaner/Rental Agreement". On the right side of the form, there are additional fields: "Reason Order was Cancelled", "Created By" (Chase Elam, Thu, 4 Jul 2024 03:26 AM), "Approved", "Currency" (USD), and "Modified By" (Chase Elam, Thu, 4 Jul 2024 03:26 AM). At the top right of the form, there are buttons for "Convert", "Edit", and a menu icon. The bottom right corner of the window shows a Windows watermark: "Activate Windows Go to Settings to activate Windows."

Take-Off Form:

- File Naming: Updated the file naming format for take-off forms to follow the structure “Deal Name - Narrative” instead of random file names.
- Owner/Creator Assignment: Configured Zoho Forms to assign the creator based on the user who submitted the form, instead of a default user.

Close Lost:

- Mandatory Note Box: Implemented a mandatory note field when a deal is marked as “Closed Lost” to require detailed explanations.
- Task Deadline Adjustment: Corrected task deadlines for take-off tasks, adjusting the deadline to 7 days as needed.

Stage Name	Probability (%)	Deal Category	Forecast Category
Qualification	10	Open	Pipeline
Needs Analysis	20	Open	Pipeline
Value Proposition	40	Open	Pipeline
Id. Decision Makers	60	Open	Pipeline
Proposal/Price Quote	75	Open	Pipeline
Negotiation/Review	90	Open	Pipeline
Closed Won	100	Closed Won	Closed
Closed Lost	0	Closed Lost	Omitted
Closed Lost to Competition	0	Closed Lost	Omitted

☐ Enable color for picklist options.

Cancel Save

Permissions and Forms:

- Ensured all relevant users have appropriate permissions for Zoho Forms, providing the correct access levels for submissions and data entry.

Service Deal Email Delays:

- Configured a 60-day delay before sending the first email to contractors requesting information for service deals, ensuring communication happens at the right time.

2. Zoho Projects Customizations:

Fire Alarm Deals & Projects:

- Fire Alarm Milestone: Automated the inclusion of a Fire Alarm milestone when a Fire Alarm project is created, ensuring consistent tracking.
- Email Notifications: Updated email notifications to include comprehensive deal and project details, enabling stakeholders to access relevant project information directly.
- Group Name Configuration: Ensured that the group name for newly created Fire Alarm projects is automatically set to “Fire Alarm” for accurate project categorization.
- Job Information Synchronization: Ensured that deal owner and job information are automatically pushed over to Zoho Projects, ensuring seamless synchronization between systems.

Project Management & Task Integration:

- **Task & Stage Synchronization:** Developed functionality where closing a task in Zoho Projects automatically updates the associated deal stage in Zoho CRM, ensuring consistent project tracking.
- **Closed Won Notifications:** Configured automated notifications for project managers when a deal is marked as “Closed Won,” ensuring prompt communication.
- **Closed Lost Archiving:** Automated the archival of projects in Zoho Projects when a deal is marked as “Closed Lost,” keeping the system clean and up to date.

Corey’s Fire Alarm Notifications:

- Created automatic email notifications for Corey to inform him of new Fire Alarm projects, directly linking to project details for efficient follow-up.

Task Synchronization Across Platforms:

- Implemented task synchronization across Zoho CRM and Zoho Projects, ensuring that task updates in one platform reflect in the other, improving workflow efficiency and communication between teams.

3. General Enhancements:

Project Archiving:

Automated the archival of projects in Zoho Projects for deals marked as “Closed Lost,” ensuring that irrelevant or outdated projects are removed from the system automatically.

New Service Deal Email Delays:

Configured a 60-day delay before the first email is sent to contractors requesting information for service deals, giving ample time for communication at the appropriate stage.

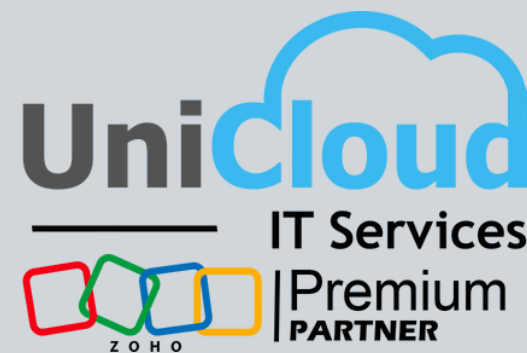


CONCLUSION:

The customizations and integrations implemented within Zoho CRM and Zoho Projects have significantly improved PEI's operations. By enhancing data visibility, sales teams now have access to only relevant information, while the change order process has become more efficient with automatic updates. Task synchronization between CRM and Zoho Projects ensures smooth communication and alignment across teams, minimizing delays. Additionally, the automated project milestone tracking, especially for Fire Alarm projects, has ensured that critical stages are monitored effectively. These improvements have not only streamlined internal workflows but also strengthened collaboration, enabling PEI to offer superior service to clients. The overall enhancements provide PEI with a more organized and efficient approach to handling projects, from initial deal creation to project completion, positioning the company to better manage its growing client base and increasing project demands.

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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