# REVIVE
## BIOMEDICAL

Client Name : Chase Elam

Country : USA

Users : 8

Subscription : Zoho One

# ABOUT

Revive Biomedical, based in San Clemente, California, is a well-established provider of medical equipment services and repairs. With over 50 years of combined biomedical technology expertise, their offerings include sales, service, repair, parts, refurbishing, and installation. They also purchase used or broken medical equipment, providing a convenient and eco-friendly solution for equipment disposal. Whether healthcare providers are looking to purchase new equipment, maintain and repair existing devices, or refurbish older models, Revive Biomedical is the trusted partner for all their medical equipment needs

# PROJECT OVERVIEW

Unicloud IT Services was tasked with implementing a customized solution using Zoho One to address the operational challenges faced by Revive Biomedical. The goal was to create an efficient, integrated system to manage sales orders, service orders, invoices, contacts, and other key processes. With a wide range of offerings and complex operations, Revive Biomedical needed a solution to improve data flow, reduce manual tasks, and ensure accuracy across their business functions.

# PROJECT OBJECTIVE

The objective was to configure Zoho CRM, Zoho Projects, Zoho People, and Zoho Sign to automate and centralize various processes at Revive Biomedical. This included managing sales and service orders, populating relevant information across multiple systems, and improving data flow between accounts, contacts, and orders. The goal was to eliminate manual data entry and reduce errors, thus improving operational efficiency and accuracy. Unicloud IT Services was focused on ensuring the system would provide real-time insights into sales orders, service orders, and invoices while offering an intuitive user experience.

# CHALLENGES

Revive Biomedical faced several key challenges in their operational processes. One major issue was the manual entry of data when creating sales and service orders, which required reselecting account information to populate details like contact information, address, FedEx number, and payment terms. Additionally, the service order did not automatically fetch important details such as the assigned sales representative and contact email. Another challenge was the invoice status, which defaulted to "Paid" rather than "Payment Pending," leading to inaccuracies. Payment terms were also inconsistently populated across the system. The service order had a limitation where only one file could be uploaded at a time, and changes made to contact details were not automatically reflected in the sales and service orders, requiring manual updates.

# SOLUTIONS

Unicloud IT Services provided a tailored solution using Zoho One to address Revive Biomedical's challenges. The system was configured to automatically fetch account details, including contact information, FedEx numbers, net terms, and sales representatives, for both sales and service orders. This reduced manual data entry. Invoice statuses were corrected to default to "Payment Pending," and payment terms were made consistent across the system. The service order was updated to support multiple file uploads, resolving the previous limitation.
Unicloud also implemented a solution to ensure contact information updates automatically across sales and service orders. Custom fields for address auto-population were added to sales orders, and Zoho Sign was integrated to manage document workflows, improving efficiency in handling contracts and HR agreements.

# FEATURES AND FUNCTIONALITIES

**1. Sales Order Automation**

- Automatic Account Selection: When creating a sales order (SO), the account is automatically selected based on the associated data.
- Auto-Population of Contact Details: Contact name and email are fetched from the associated account and populated in the sales order.
- Auto-Population of Account Information: Address, FedEx account number, net terms, and sales representative details are automatically populated based on the account information.
- Custom Address Fields: Custom fields are created to handle address auto-population when required.
- Email Population: The correct contact email is automatically populated in the sales order, instead of the default contact email. The redundant Contact email" field is removed.
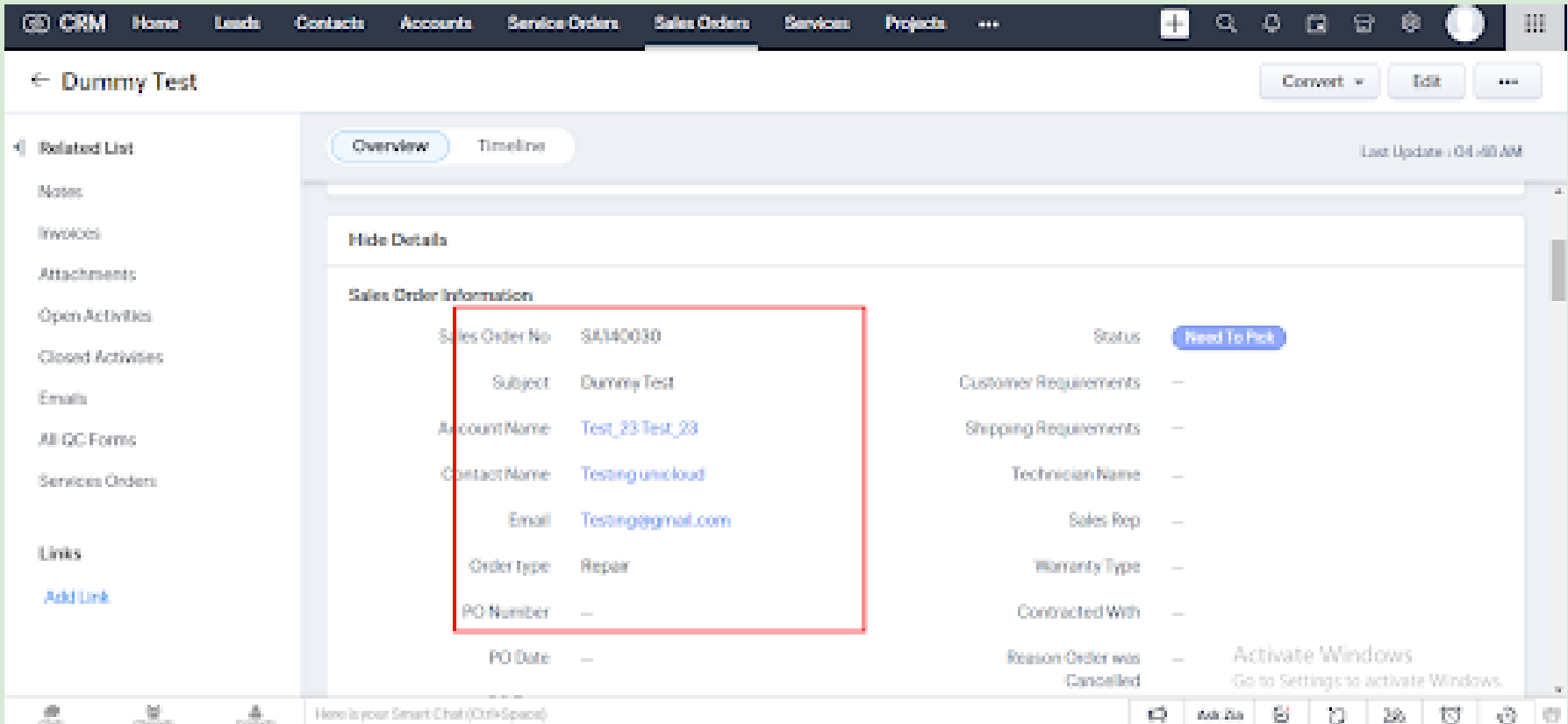
## 2. Service Order Automation

- Automatic Account Selection: Similar to SO, the account is automatically selected when creating a service order (SE).
- Auto-Population of Contact and Sales Rep: Contact name, email, and sales representative are automatically populated from the account.
- Auto-Population of Account Details: Account details like address, FedEx number, payment terms, and sales representative are automatically updated in the service order.
- Address Population: The service order (SE) correctly populates the address from the account. Sales orders (SO) require custom fields for address population.
- Contact Email Auto-Population: Selecting the contact automatically populates the correct email address in the service order.
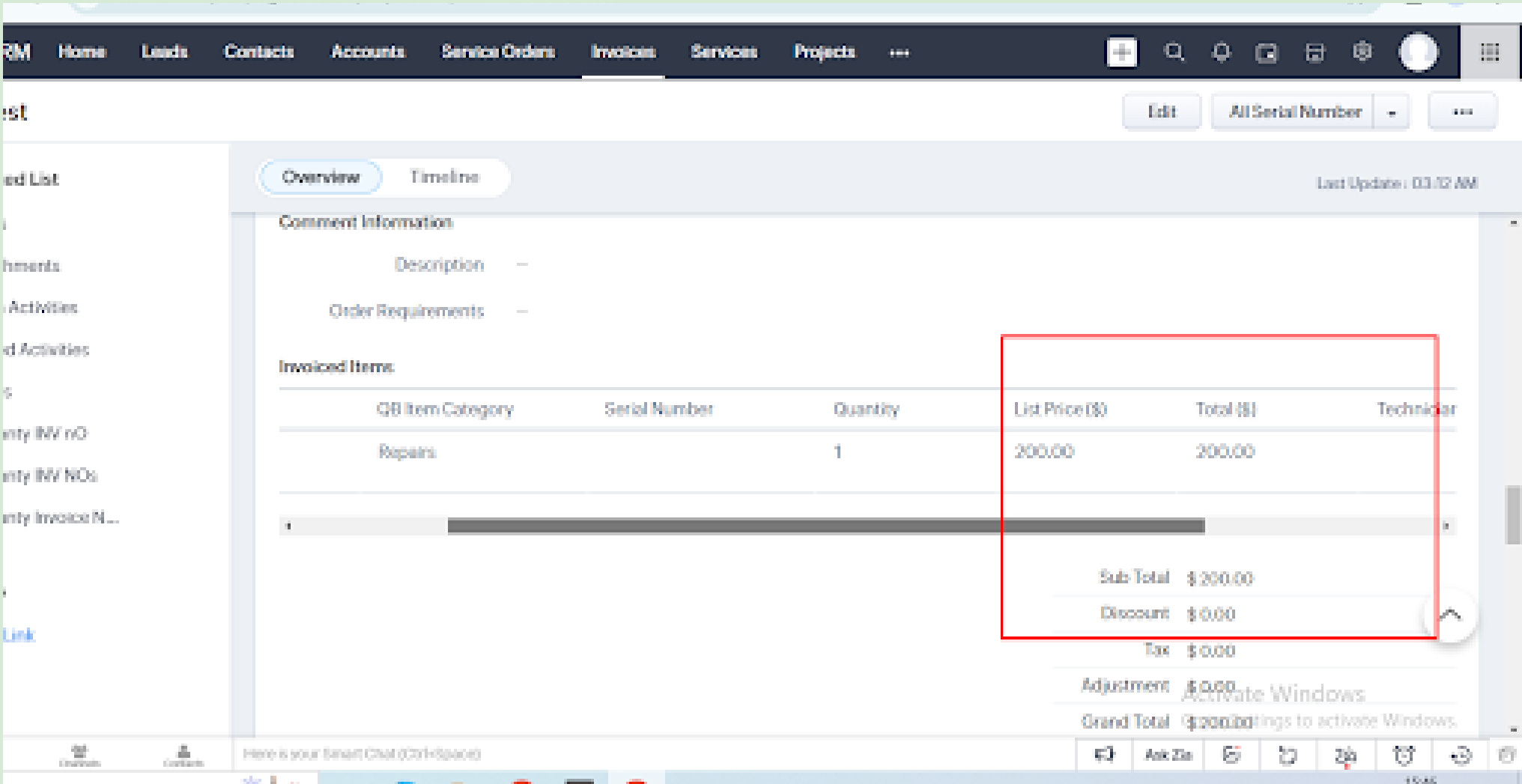
## 3. Invoice and Payment Status

- Invoice Status: The invoice on the sales order is set to "Payment Pending" status instead of "Paid."
- Payment Terms: Payment terms are populated correctly in both sales and service orders, with functionality confirmed to be working.
- Dollar Amount Transfer: Invoice amounts are transferred correctly from the sales order or service order.

## 4. File Uploads

- Multiple File Uploads: A subform has been added to allow the uploading of multiple files in service orders (SE).
- Single File Upload Restriction: Initially, SE only allowed one file, but now it can handle multiple files.

## 5. Contact Details and Updates

- Contact Email Syncing: The contact email populates correctly when selected, and updates automatically when changes are made to the contact details page.
- Sales Rep Information: The sales representative is populated from the account and appears in both service and sales orders.

## 6. Quotes and Sales Orders Enhancements

- Quote Contact Information: Email and phone number populate in quotes when the correct contact is selected.
- Sales Rep Dropdown Removal: The dropdown for sales rep is removed from quotes, as the "Owner" field is sufficient.
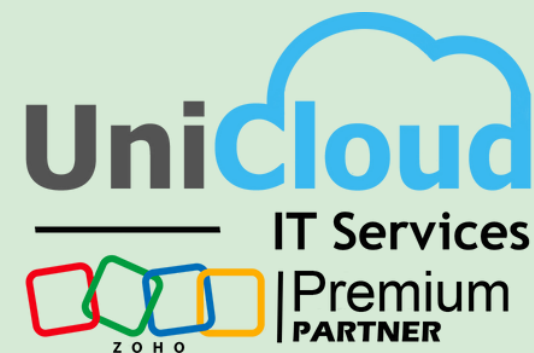
# CONCLUSION

Unicloud IT Services successfully implemented a customized Zoho One solution for Revive Biomedical that significantly improved operational efficiency. By automating the population of sales and service orders with account details, contacts, and invoice information, Unicloud IT Services eliminated much of the manual effort and reduced the potential for errors. The solution also addressed key challenges such as invoice status, file uploads, and contact synchronization. As a result, Revive Biomedical now has an integrated system that provides real-time insights, reduces manual tasks, and ensures data accuracy, allowing the company to focus on providing high-quality medical equipment solutions to its clients.

# 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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