

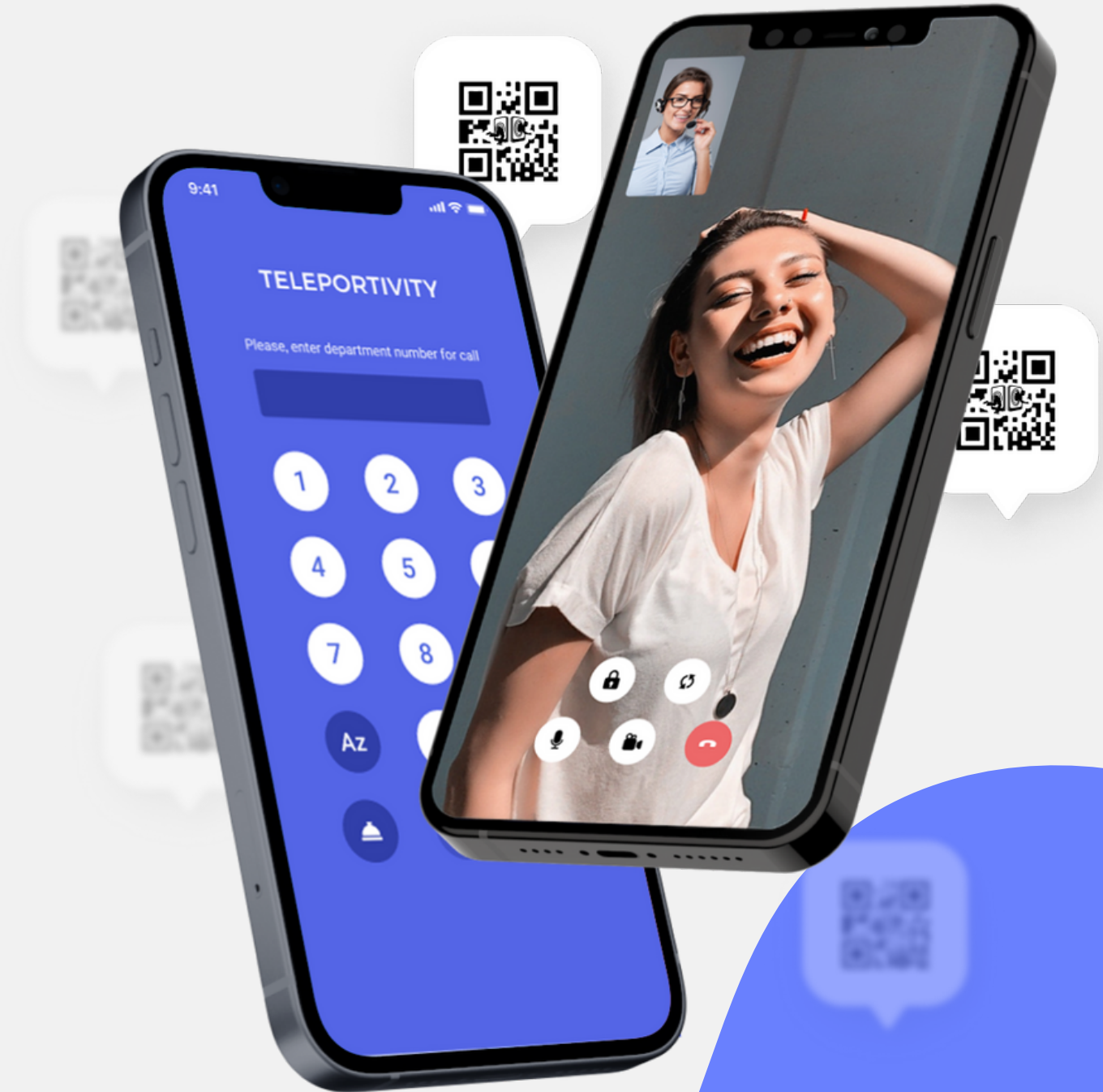


TELEPORTIVITY

Client: David Borg

Country: Australia

Total Users: 07



About the Client

Teleportivity, a leading provider of connection solutions, recognized for innovation by the Security Industry Association (USA) as the 2021 "Judges Choice" winner, specializes in redefining intercoms, video concierge services, and help-as-a-service solutions.



Challenges:

Teleportivity faced intricate challenges in its quest to enhance the sales process and integrate Zoho CRM with Zoho Booking for streamlined automation. The specific challenges included:

1. Integration Complexity:

API Interfaces: Navigating intricate API interfaces to ensure seamless communication between Zoho CRM, Zoho Booking, and Zoho Billing.

Data Exchange: Establishing a robust data exchange mechanism to avoid latency and discrepancies in real-time data synchronization.



2. Customization Requirements:

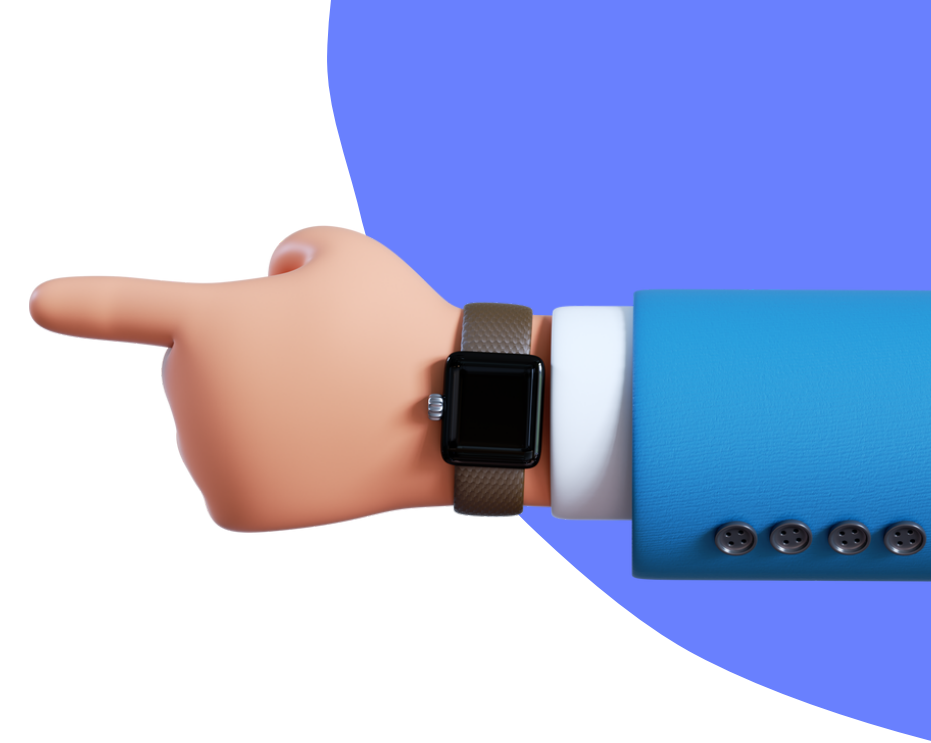
Button Creation: Deep customization of Zoho CRM, requiring the creation of buttons within the interface for generating quotes and automating field updates.

Scripting Expertise: Utilizing advanced scripting functionalities to accommodate complex workflow automation based on quote acceptance.

3. Email Automation:

Spam Avoidance: Implementing automatic email notifications for quote delivery without triggering spam filters.

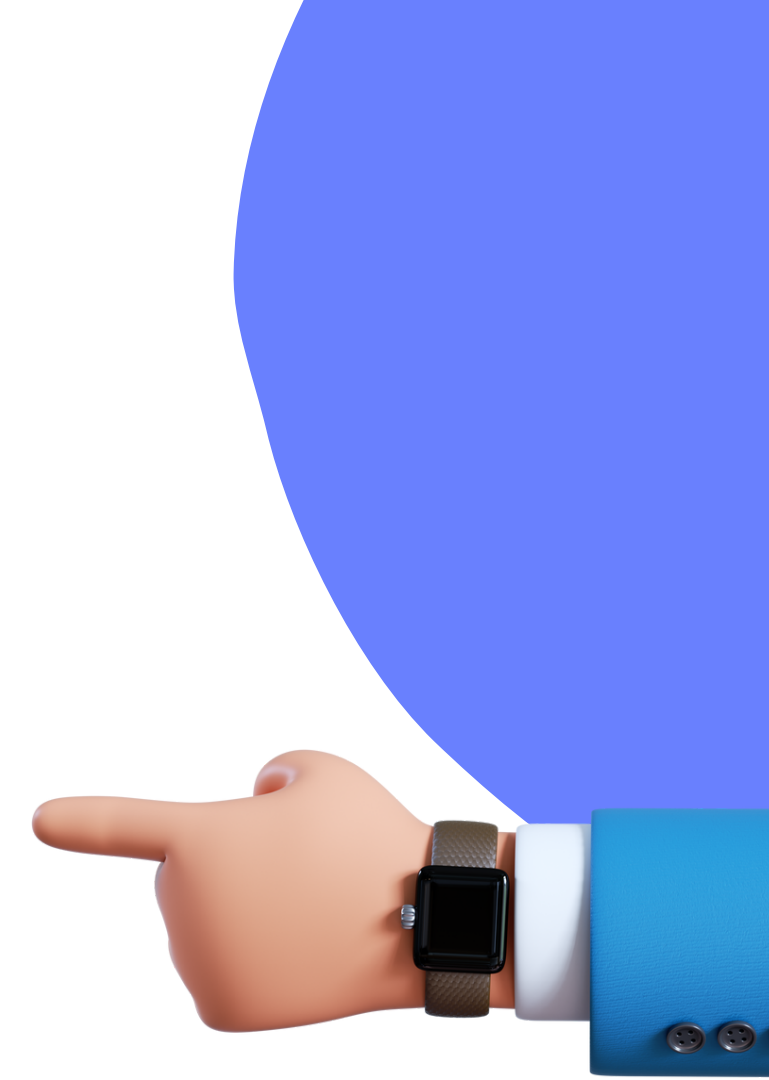
Template Setup: Configuring email templates within Zoho CRM for a professional and consistent communication process.



4. Data Synchronization:

Real-time Accuracy: Ensuring real-time data synchronization to prevent discrepancies in transaction details, pricing information, and deal statuses.

Error Handling: Developing strategies to handle potential errors or disruptions in data synchronization seamlessly.




5. Subscription Management:

Billing Cycles: Managing subscription creation in Zoho Billing, considering diverse billing cycles and ensuring accurate billing calculations.


Lifecycle Management: Implementing strategies for efficient subscription lifecycle management, including pausing and resuming subscriptions as needed.

Solution:

UniCloud IT Services began a comprehensive journey to address Teleportivity's complex difficulties. With a thorough understanding of the integration challenges, the team successfully deployed Zoho CRM and Zoho Booking Integration. Customizing the CRM interface enabled customers to easily establish deals and add goods, hence improving the overall user experience. Automated email notifications were deliberately configured within Zoho CRM to ensure that quotes are delivered to clients on time and without reaching spam filters. Workflow optimization became a focus feature with the introduction of scripting capabilities to automate transaction closing following quote confirmation.



UniCloud IT Services has added a user-friendly button to the deal module, which allows customers to generate quotes with a single click and redirects them to the quotations module. The complexity of Zoho Billing integration was handled with ease. Smooth transitions between Zoho CRM and Zoho Billing made precise financial calculations possible, while subscription creation and status updates in Zoho Billing were painstakingly managed, taking into consideration various billing cycles and payment processing complexities. This comprehensive methodology enabled an easy workflow between CRM and invoicing platforms, allowing Teleportivity to effectively handle deals and subscriptions, ultimately improving operational efficiency and customer communication.



Functionalities

Recognizing the need for additional functionality, UniCloud IT Services offered a set of features that enhanced Teleportivity's capabilities. Users now have the ability to build deals and add products effortlessly within the CRM system, expediting the beginning steps of the sales cycle. A user-friendly "Quote Creation" button was strategically placed within the deal module, offering a quick pathway to generate quotations while seamlessly transferring users to the quotes module. When a quote was created, the system immediately delivered it to clients via email for timely evaluation. Furthermore, UniCloud IT Services created an update mechanism for deal fields following quote acceptance to ensure accuracy and consistency. The system also offered a faster deal closure procedure, which instantly updated the deal stage to "Closed Won" after quotation confirmation.

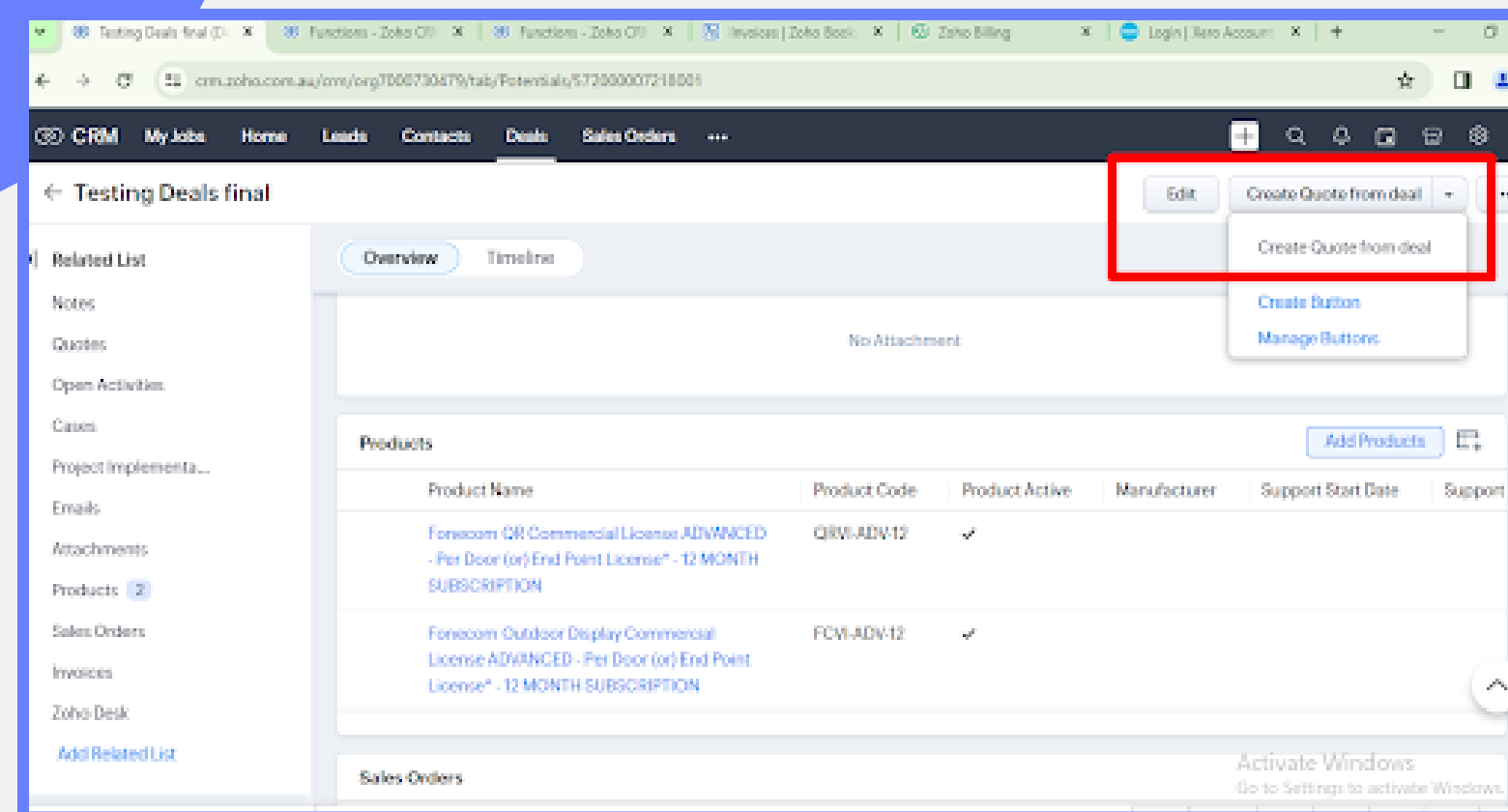


Subscription management was improved with automated subscription setup in Zoho Billing following quote stage confirmation, and the system easily transitioned subscription status from "Paused" to "Resumed" upon client invoice payment.

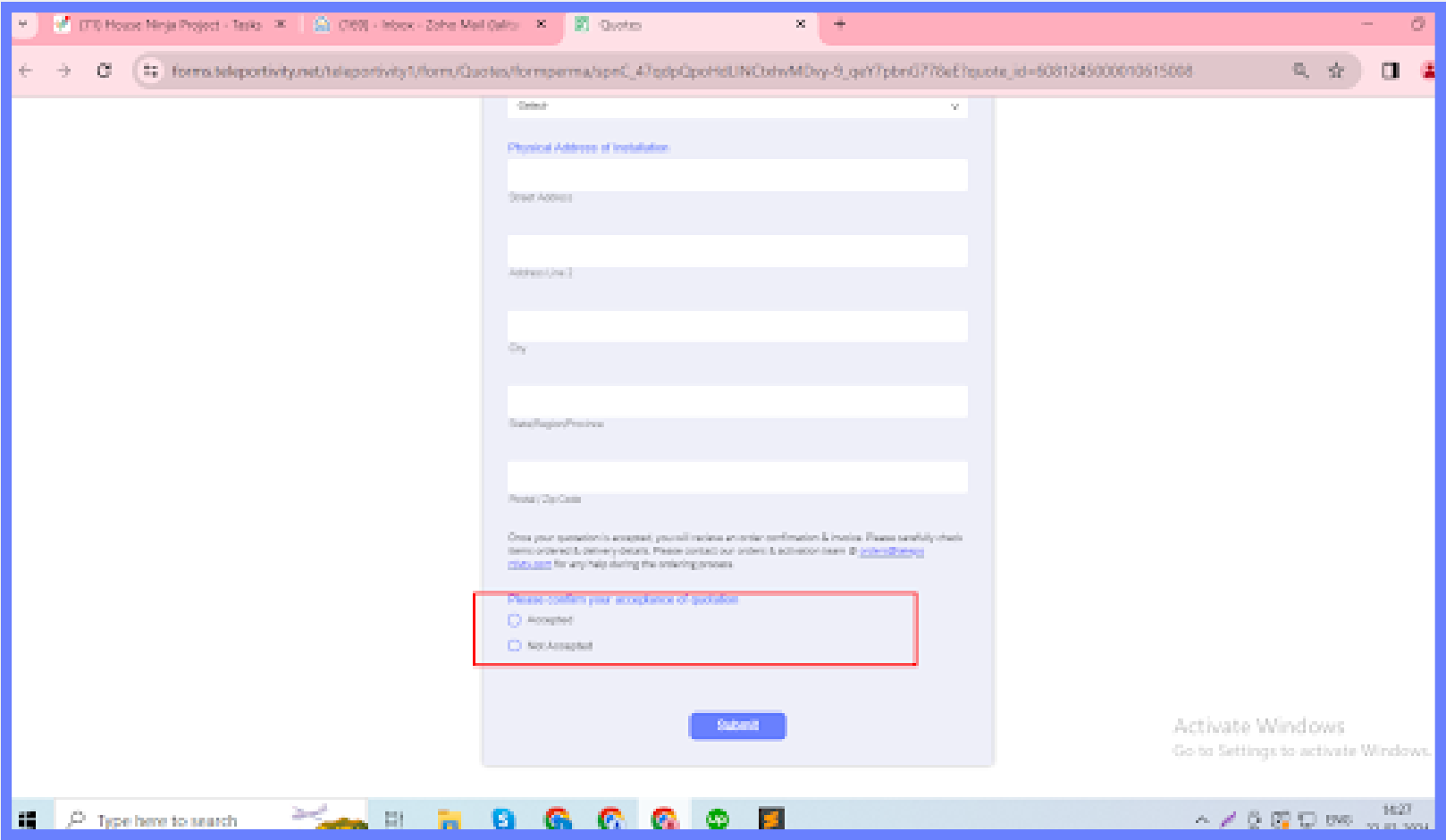
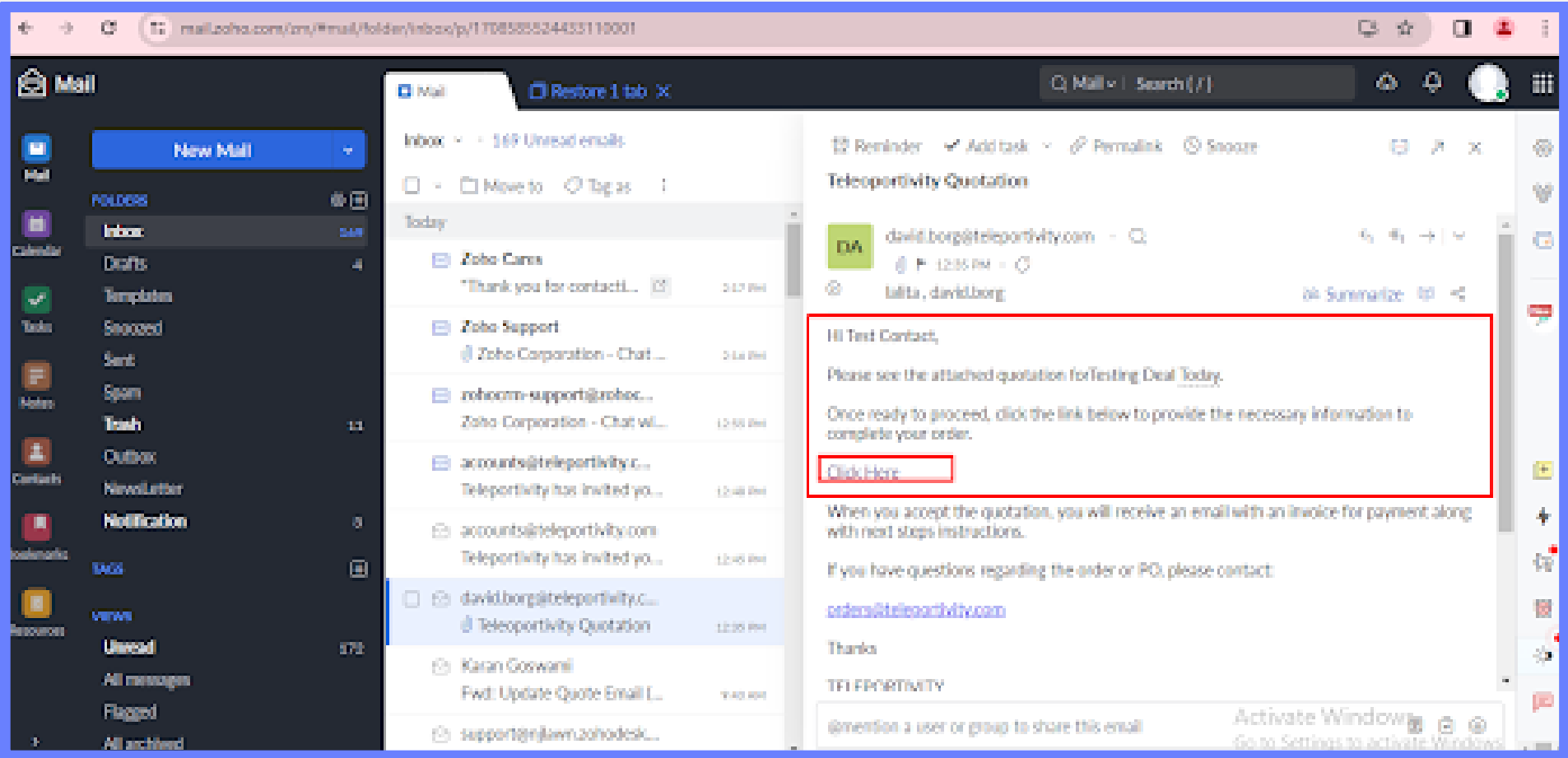
Product Name	Product Category I	Product Code	Quantity (000)	Distribution_Buy (0)	Distribution
Fonecom Outdoor Display Commercial License STANDARD - Per Door (or) End Point License* - 12 MONTH SUBSCRIPTION	Annual Subscription	FCVL-STD-12	1	182.00	182
FONECOM10 - Outdoor Display - 10" IP65 - Includes 1 Year Std Wty	Hardware	FONECOM-10	1	2,608.17	2,608.17
TPM10 Web Relay - Quad - POE	Hardware	IPW-4-POE	1	318.27	318.27

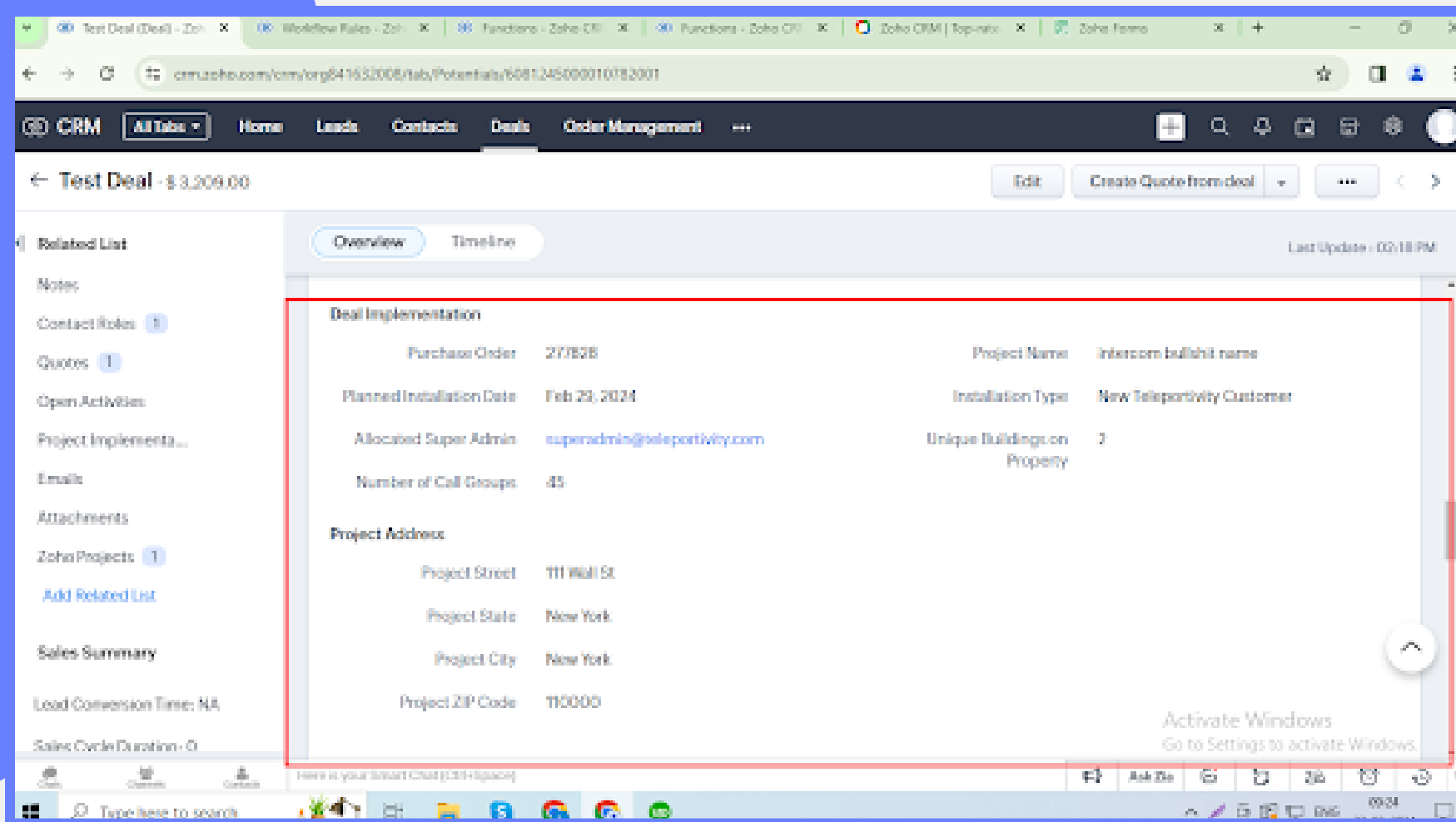
Here is the screenshot showcasing creation of deals and adding products within the CRM system. This step involves capturing essential details about the deal and selecting the relevant products or services to be included.

To streamline the process further, a button is implemented within the deal module. Upon creating a deal, users can effortlessly generate a quote by clicking this button. This action redirects them to the quotes module, where they can proceed with creating the quote.

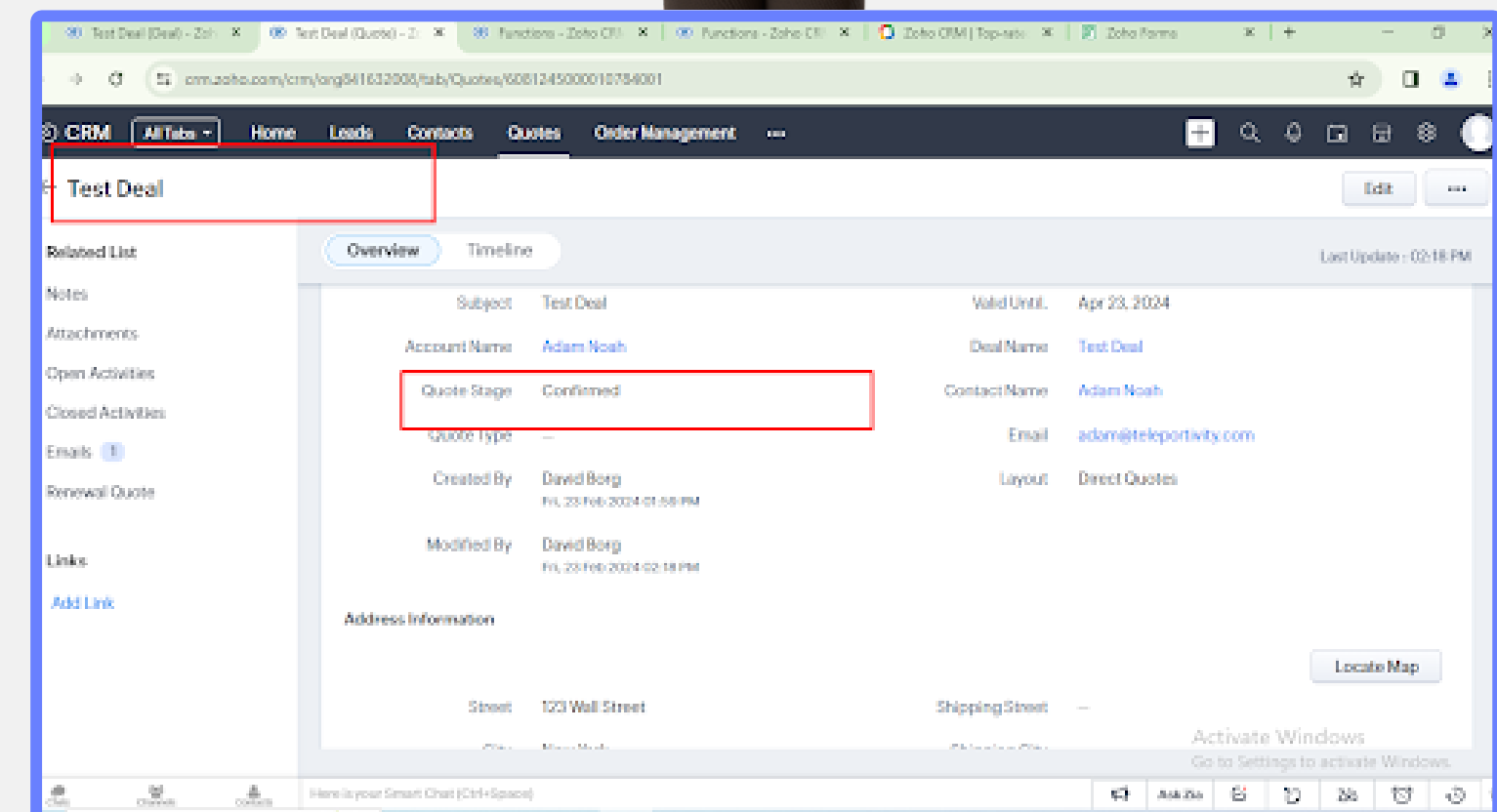


Once the quote is created, an automated email notification is triggered to send the quote to the client's email address.



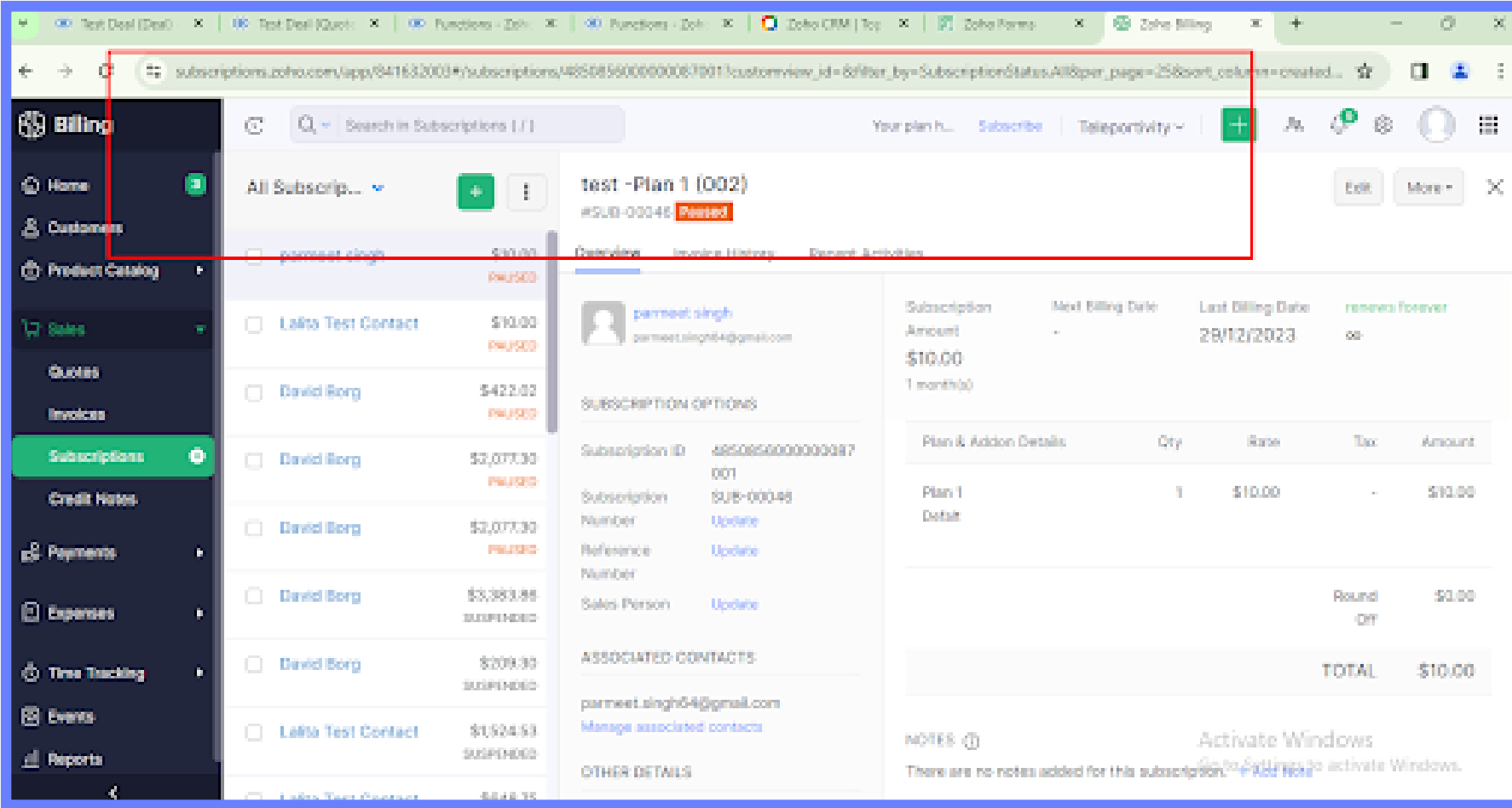


Upon accepting , the quote stage within the quotes module is updated to "Confirmed." This serves as a confirmation of the client's acceptance and triggers further actions in the system



With the quote stage confirmed, the deal stage within the CRM system is automatically updated to "Closed Won." This signifies the successful closure of the deal and facilitates accurate tracking of deal statuses.

Upon confirmation of the quote stage, a subscription is automatically created in Zoho Billing. This step ensures that the necessary billing arrangements are in place to facilitate the provision of products or services outlined in the deal.



Conclusion:

In the aftermath of UniCloud IT Services' transformative intervention, Teleportivity witnessed a significant evolution in its sales processes. The effortless integration of Zoho CRM and Zoho Booking, together with diligent management of customisation, scripting, and workflow automation difficulties, resulted in increased efficiency and better customer communication. The strategic partnership with UniCloud IT Services not only optimized deal closure and quote generation but also streamlined subscription management in Zoho Billing.



Today, Teleportivity stands on a robust platform, equipped with automated quote confirmations, precise deal closures, and a comprehensive subscription lifecycle management system. UniCloud IT Services, as a dedicated partner, played a pivotal role in positioning Teleportivity for continued business growth. The success story unfolds in the efficient orchestration of sales processes, increased operational efficiency, and a strengthened foundation for future endeavors.



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 ZOH0 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/>

