

# HIGH DIGITAL ONE95 PROJECT

# INTRODUCTION

## HIGH DIGITAL LIMITED

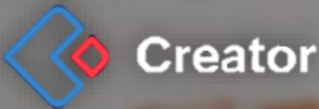
A digital solutions provider. They design, build, launch, and manage digital projects.

**ONE95** is an agency based in Shoreditch, London, specialising in Demand Generation for Global B2B Brands. Their mission is to connect B2B companies with B2B buyers, in any country, in any language in the world.

So both the companies are operating hand in hand.

They require an automated platform for the bidding process, since they previously had to manually approve and refuse offers.

# REQUIREMENTS



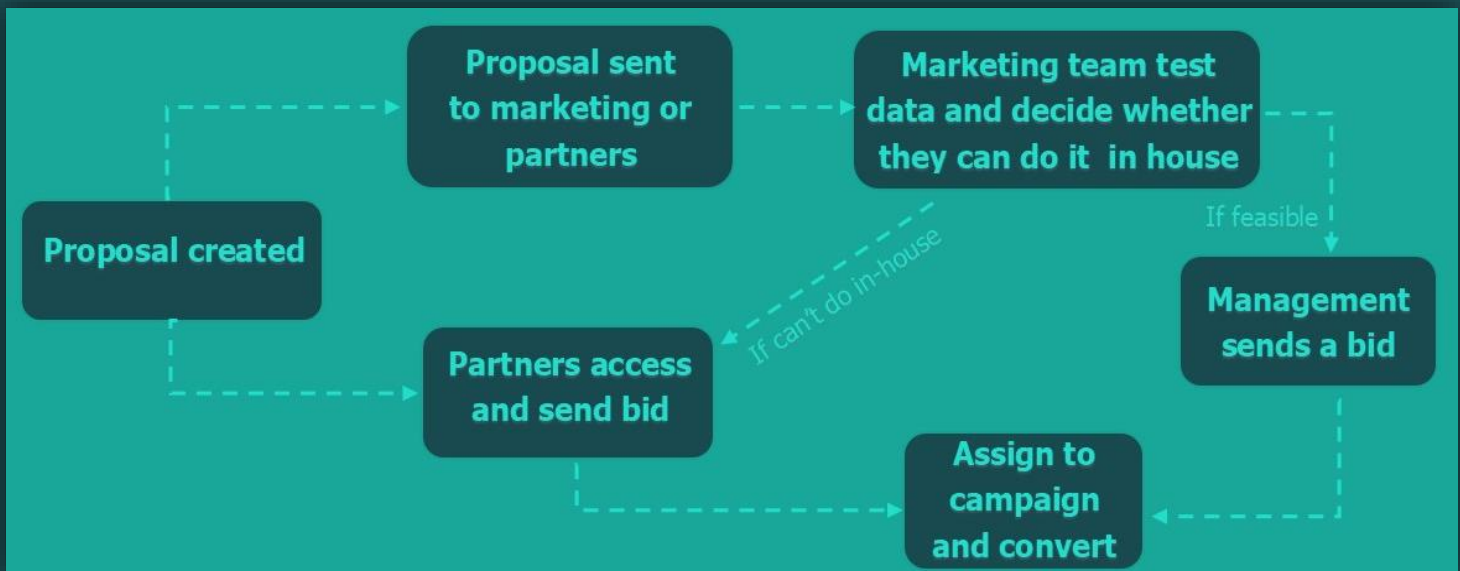
With the integration of **ZOHO CRM** and **ZOHO Creator**, ONE95 demands an automated bidding flow for their Portal.

The entire process revolves around the acceptance and rejection of bids, as well as supporting the team in reaching out to clients once the offer has been approved.

When a client's demands cannot be met in-house, the task must be automated and sent to a partner based on a set of criteria.

So Partner-bid application is integrated with ZOHO CRM & Creator

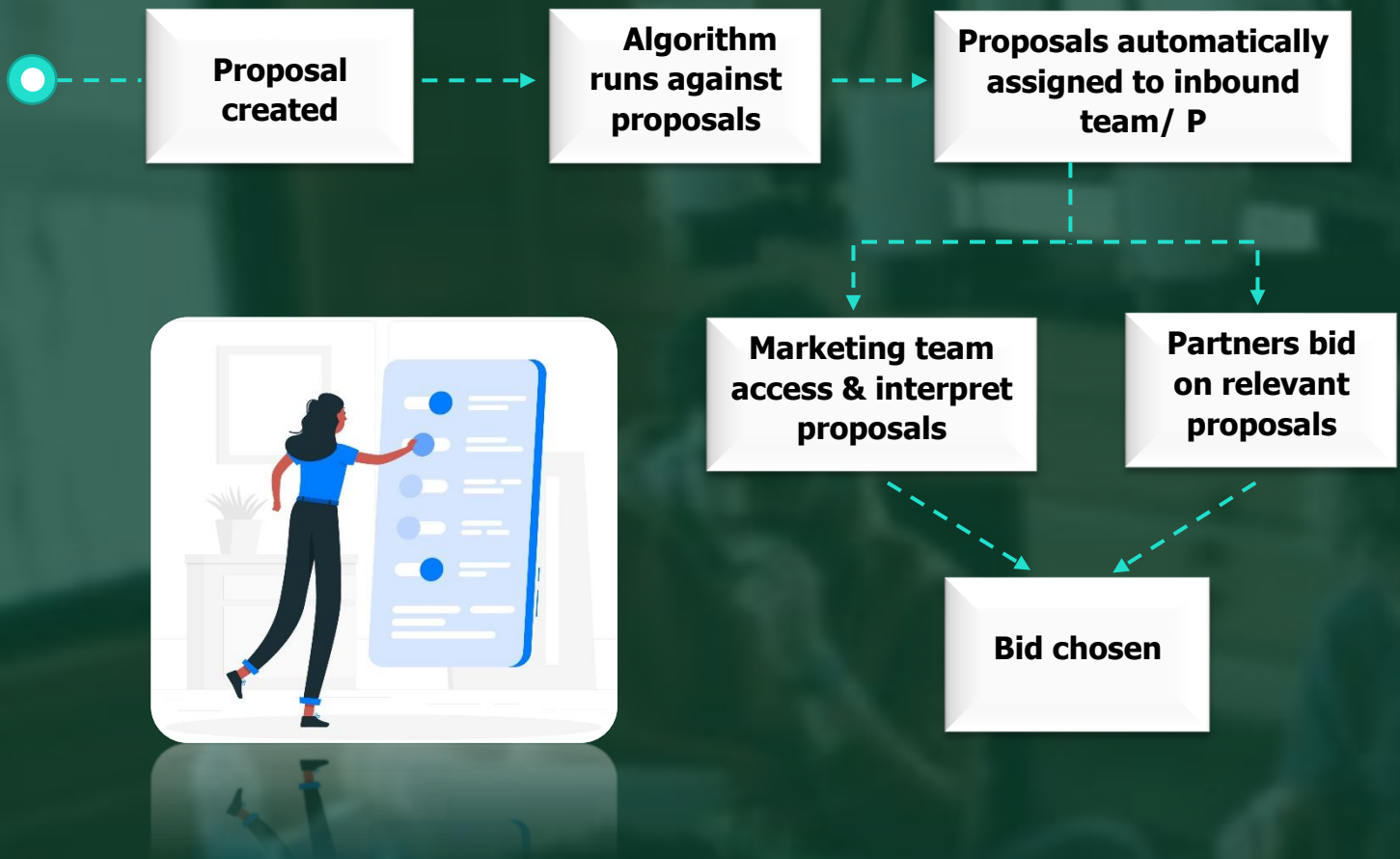
## EARLIER BIDDING FLOW



Earlier management needs to filter the proposals, check the feasibility and transfer to partners manually. So now they need this process to be automated.



## DESIRED AND IMPLEMENTED FLOW



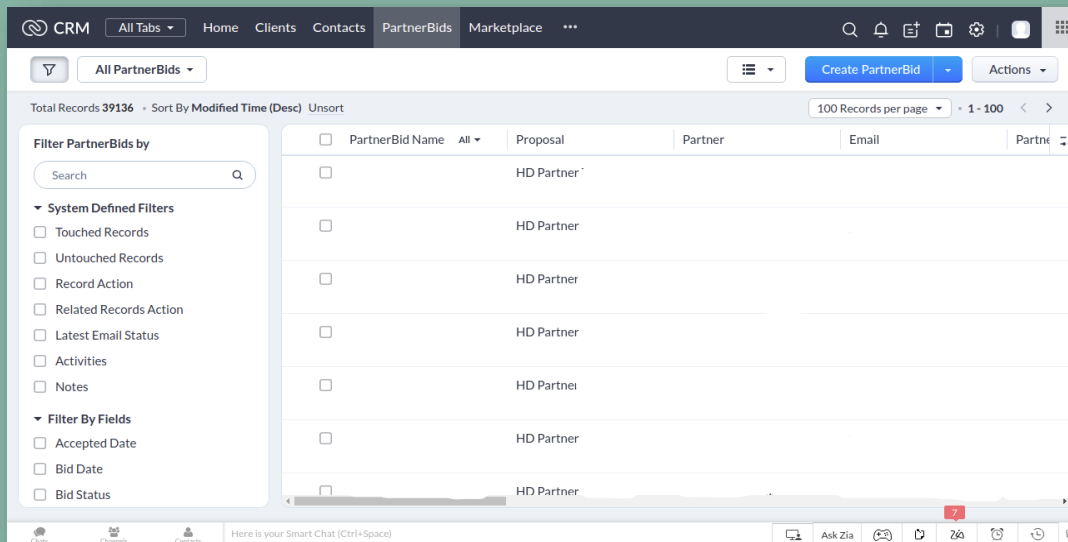
- After a proposal is generated, the smartech database contains conditions that determine which proposals are to be chosen.
- The selection criteria includes – Proposal campaign delivery, proposal country, industry, employee size, job functions, etc.
- If criteria got matched then it automatically assigned to inbound partner otherwise they select the outbound partners and partner bid get created.
- It is integrated with partner-bid application and the entire workflow mirrored there as well. ( partners can accept or decline the bid)
- Proposals are also amended in **ZOHO CRM**, and any updates are instantly communicated with partners through email.
- Partner-Bid application is linked to **ZOHO CREATOR**, any changes made in **ZOHO CRM** will also be reflected in **ZOHO CREATOR**.

So this is the precise flow that the customer needs, which we have successfully executed.

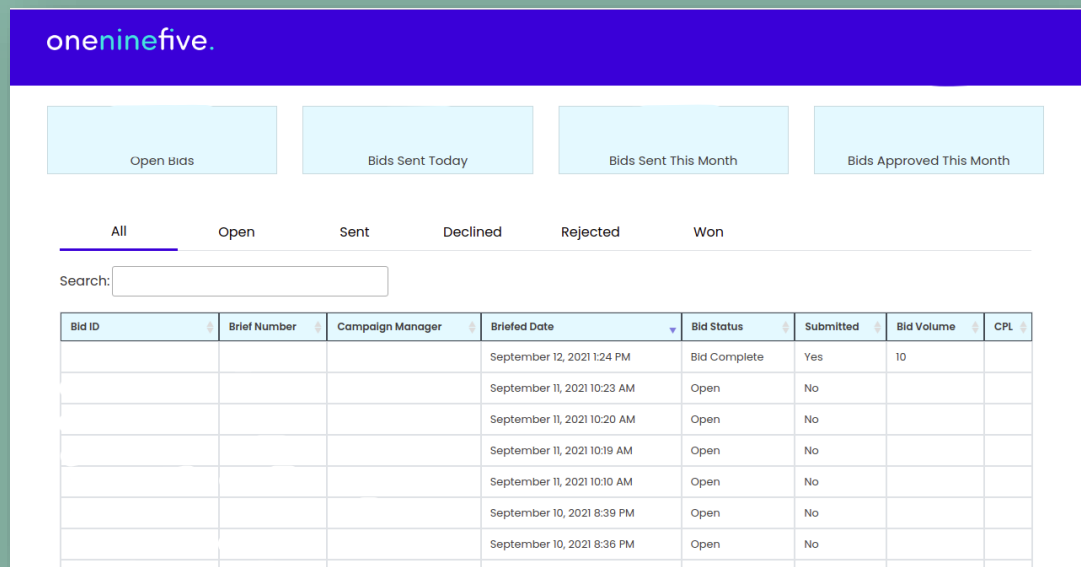
# IMPLEMENTATION.....

## (Customizations and Integrations)

### ZOHO CRM

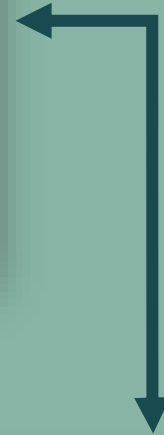


### PARTNER BID PORTAL



## ZOHO CREATOR

The screenshot displays a web application titled "Choose Partner". On the left is a dark sidebar with a list of menu items: "Choose Partner" (highlighted in green), "Partner Data", "Choose Partner", "SendEmail", "Delete Partners", "thankyoupage", and "Failed Bids". The main content area has a header "Choose Partner" and a form with a label "Choose Partner" and a dropdown menu currently showing "-Select-". Below the form are two buttons: a green "Submit" button and a white "Reset" button. The top of the application has a navigation bar with "Edit this application" and "Help" links. At the bottom left, a user profile for "oliver" is visible.



## PARTNER BID PORTAL

Campaign: BNI010-1000

Reference No: 00000000000000000000

Region	
Country	
Industry	All
Industry Exclusion	
Sub-industry	
Sizes	
Job Titles	
Job Titles Exclusion	
Job Keywords	
Job Levels	Manager
Job Function	IT,Marketing
TAL	No
Suppression List	No
Leads per Organisation	
Languages Accepted	English
Questions	0
Question Detail	
Technology Install	
Content Type	

Enter your bid cost per lead, volumes and any additional info you think would be useful in the boxes below to be considered for this brief.

We appreciate your support, and will endeavour to get back to you with feedback as quickly as possible!

For any further information around this campaign, please [email](#)

X Decline to Bid

Partner Name High Digital Test

Currency GBP

Bid Cost per Lead

Bid Lead Volumes

Set Live Days Days

Bid Channels

It has been executed effectively and the client is satisfied with all services delivered by UNICLOUD IT SERVICES.

The project's next phase is to set up **ZOHO ANALYTICS** for data tracking and timely reporting and, following that, there is a slew of other modifications and set-ups that will be deployed in the near future.

# ABOUT UNICLOUD IT SERVICES



Was officially launched in the year 2018 on 12th of September.

Unicloud IT Services is a cloud service provider company and ZOHO Advanced Partner. With more than 7 years of professional expertise, Unicloud is committed to provide the dedicated services for the ZOHO products to its clients. Unicloud has high rate of client retention and successful deliveries. We have more than 2000+ customers to whom we have provided the services and been providing the support.

Unicloud has completed 697+ Projects along with more than 2000+ satisfied customers and with a project succession rate of 95% to date and continuously working on more projects from different industries.



## FOLLOW US



Website:  
<https://www.uniclouditservices.com/>

Contact:  
[911724660874](tel:911724660874)

Email:  
[info@uniclouditservices.com](mailto:info@uniclouditservices.com)