

ZOHO Creator Implementation for Occam Immigration

By: Unicloud IT Services



INTRODUCTION

OCCAM IMMIGRATION is an experienced Immigration Attorneys which aims at simplifying Immigration for Businesses, Families, Investors, & Visitors in South Carolina & around the World. Occam Immigration is a recognized choice for education and experience when it comes to immigration law.

The Business was looking for a solution with a customer portal through which the customers can access his/her own matter. Occam wanted an application which can be integrated with other applications for creation of invoices and storing the client records.

Unicloud IT Services used ZOHO Creator to construct a fullfledged application for Occam immigration and integrated it with other zoho platforms which fulfill all the desires of the immigration business.



BUSINESS:

OCCAM IMMIGRATION

- Location: Charleston, South Carolina, U.S.
- Industry: Immigration Services
- Website: <u>https://occamimmigration.com/</u>

SELECTION CRITERIA

- Fast Implementation
- Value for money
- Easy to learn and use
- Timely support



PROBLEMS



- Manual Recording of data: Number of units, due amount, and commission payment—every detail had to be recorded on paper.
- Scattered Information
- As our business grew, managing the records of customers on paper became inefficient and Time-consuming.
- Real time updating client regarding his/her matter was a nightmare.
- We weren't able to track our critical matters effectively, which had us facing considerable losses.
- Mismatching of invoiced amount in books created a huge mess.

- Streamlined process for tracking all transactions
- Handling contract creations, data collections
- Customizing ZOHO CRM
- Sign, send, and manage documents online.
- Sync all the data from one platform to another and make a unite solution.

REQUIREMENTS

The client's request is for a solution that allows them to unify all of their business's processes. Where their consumers may simply check the status of their cases and receive bills in a timely manner.

So, with the support of the ZOHO platforms, we were able to address the client's challenges and create a solution that met all of their needs.

IMPLEMENTATION

- ✓ Customized ZOHO CRM
- ✓ Admin Portal
- ✓ Client Portal
- ✓ ZOHO Books setup and integration
- ✓ Integrated ZOHO sign

4 ZOHO CRM

		10000			Q Search Modules	1>2			
CCAM	Welcom				Activities Applications Application Notices			U DV He	ome Page 👻 🚥
Matter Name	Stage	Contact Name	Matter Owner	Modified Time	Families SalesInbox Companies ZohoSign Recipients ZohoSign Documents ZohoSign Document Events Retainer Invoice Occam Business Contacts Retail Invoice Tracker Important Matter Dates	Status Not Started Not Started	Priority High High High	Related To	Contact Name
				Ŧ	App Forms Products Vendors	Not Started	High		, *
				< 1 to 10 >	+ Create New Module				< 1 to 10 >

INTEGRATION

(Edit	Create Applica	• ··· < >
Sales Summary					
	Overview Timeline				Last Update : 12 day(s) ago
Lead Conversion Time: NA			T THE AU L DOLL		
Sales Cycle Duration: 0	Recruitment Start Date		Print Ad 1 Type		
Sales Cycle Duration. 0	Recruitment End Date		Print Ad 1 Type	_	
Overall Sales Duration: 0					
	30-Day Cooling Period 🔞				
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FedEx Tracking Link	Engagement Letter Sent		Engagement Letter Signed	-	
USPS Tracking Link					
🛥 USCIS Case Status	Onboarding Invoice Sent	-	Onboarding Invoice Paid		
	Portal Invitation		Questionnaires Complete	-	
Photo Upload Link			20 5 72 50 1		^
🗢 Go to Portal	Forms Approved		Forms Sent for Client Review		\sim
Add Link	All Fees Paid	_	Review		
			Attorney Review	-	
	Receipts Received		Complete		

With this button the admin can access the creator portal for the specific client's matter, and can immediately create invoices and do other operations with the matter.

https://www.uniclouditservices.com/

my OCCAM
Sign In
Email Address
Email Address
Password
Password
Sign In
Forgot Password?

We have created a customer portal, through which a customer can access

- o Its own matters
- o Status of the matter
- $\circ \quad \text{Retainer invoices} \quad$
- \circ Invoices
- Get signed documents with zoho sign.

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8월 CASE DETAILS			ſ			-
	\$ 1650	0.00		\$ 150.00	\$ 1500.0	0
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🚔 Case Types						
Create Recurring Invoice	Retainer Invoices					
Invoices	Action Amount	Customer Name	Matter Number	Matter Name	Items	Status
	150.00		20193		Paid Consultation	Paid
	Pay Now 1500.00		20193		1st installment of legal fee	draft
	Invoices					
	Customer Name	Matter Number	Matter	Name	Items	
		20193			1st installment of legal fee	
		20193			1st installment of legal fee	
		20193			Paid Consultation	
		20193			1st installment of legal fee	
		20193			null	

The portal has been designed to be completely responsive on mobile devices as well. It supports all functions without any issues.

4 ADMIN PORTAL

In the admin portal, we have created a dashboard that displays the total amounts, the amount paid, and outstanding payments. From the admin portal, the admin can easily create the retainer invoice or invoice.

We have created different forms to track the record and get all the records in creator from CRM and Books.

CCCAM IMMIGRATION			Subscription	Edit this application ③ Help	
OCCAM IMMIGRATION					
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🕾 DASHBOARD	\$ 0.00	\$ 0.00	\$	0.00	
含 Home	Total Payment	Amount Paid		nding Payment	
음 CASE DETAILS					
News & Announcements					
	Retainer Invoices				
INVOICES	Action Amount	Customer Name Matter Number	Matter Name	Items Status	
费 MATTERS >	Invoices				
ర్టి Contacts >	Customer Name	Matter Number	Matter Name	Items	
۵۵ Families >					
🚔 Case Types	Creat	e Retainer Invoice	Create Invoice		
Task Lists >					
🔁 To Do For Clients >	9				

		Create Retain	ner Invoice
		Customer Name	Mr. Rohan Sharma
		Matter Number	20193
		Matter Name	Sharma Removal of Conditions (Test)
Create Retainer Invoice		Items	
	, r	Item	Description
- Charles			+ Add New
			Submit Reset

As a result, the customer receives a platform with all of the essential features.

4 ZOHO BOOKS

board	Dashboard Recent	Updates		Getting Star
•				
ng	Total Receivables 💿	🙂 New	Total Payables [®]	New
	Total Unpaid Invoices \$6,595.00		Total Unpaid Bills \$0.00	
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We have synced all the data from CRM and Books that are to be needed in ZOHO Creator application, such as matters, contacts, case types etc.

<u>RESULTS</u>

- ✓ All of their processes are now digitized and automated
- ✓ Monitor, control, and reports are generated on a daily basis, in real-time.
- ✓ Customers can track their matter's status.
- ✓ Now the platform gives 360° view of the business operations.

About "UNICLOUD IT SERVICES"

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 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.



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