

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 full-fledged application for Occam immigration and integrated it with other zoho platforms which fulfill all the desires of the immigration business.

ZOHO PLATFORMS USED

- ZOHO Creator
- ZOHO CRM
- ZOHO Books
- ZOHO Sign



BUSINESS:

OCCAM IMMIGRATION

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

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

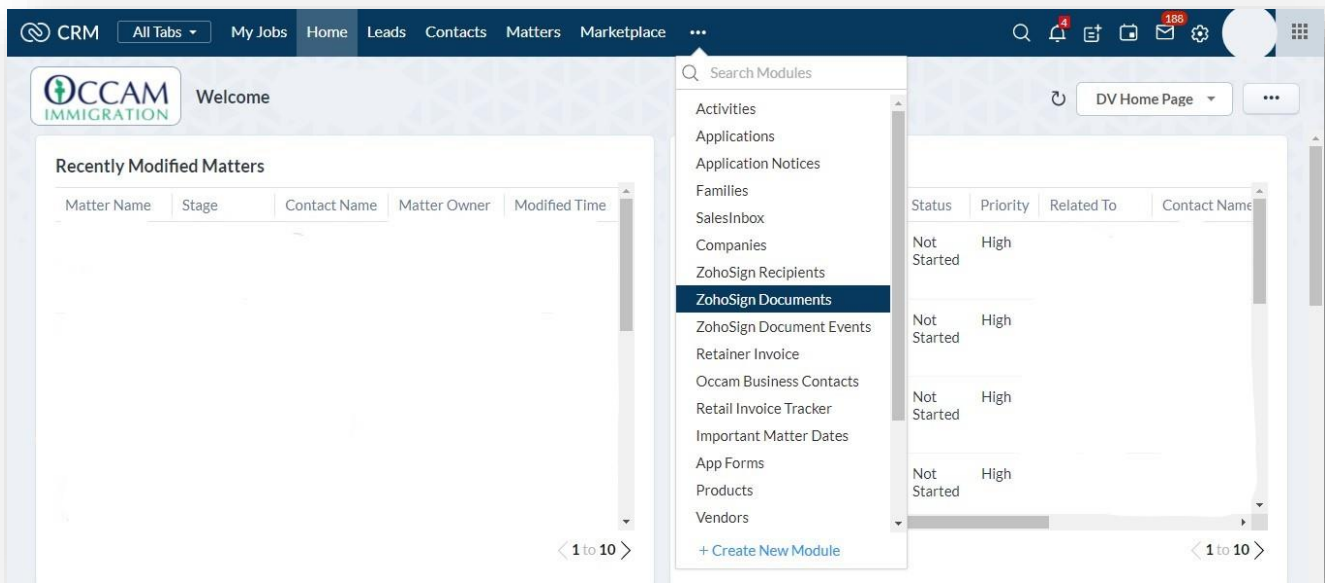
The client's request is for a solution that allows them to unify all of their business's processes. Where their consumers may simply check the status of their cases and receive bills in a timely manner.

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.

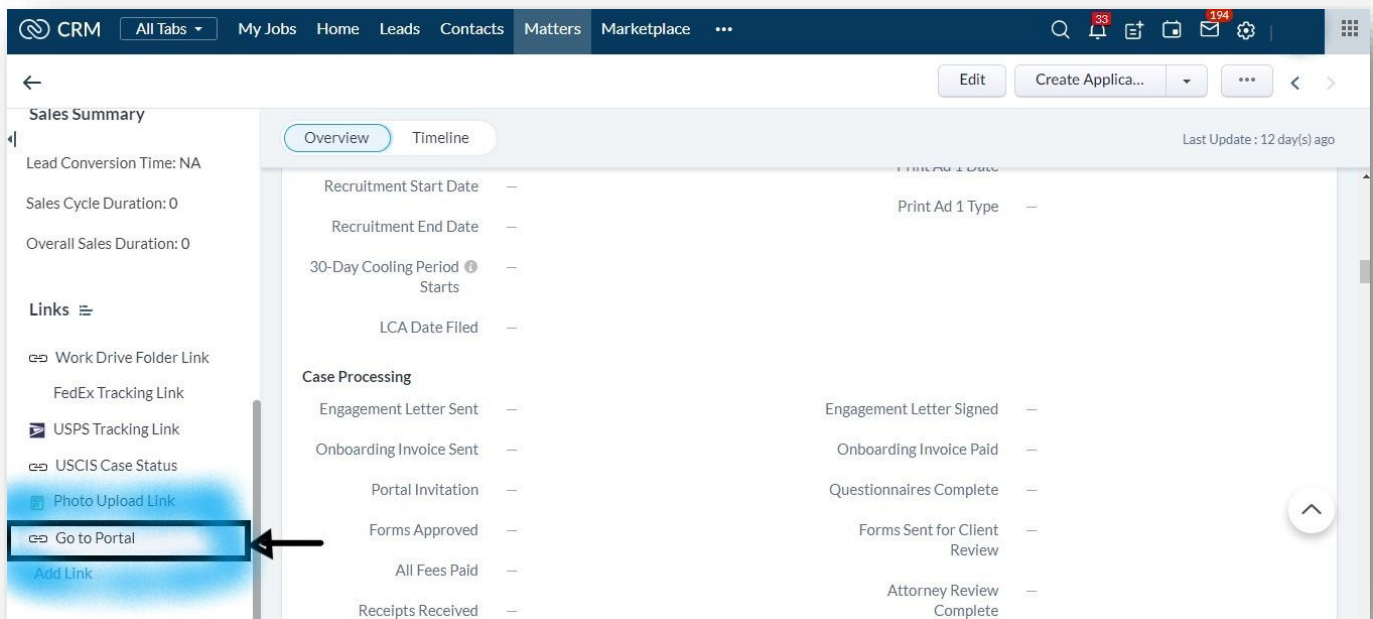
IMPLEMENTATION

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

ZOHO CRM

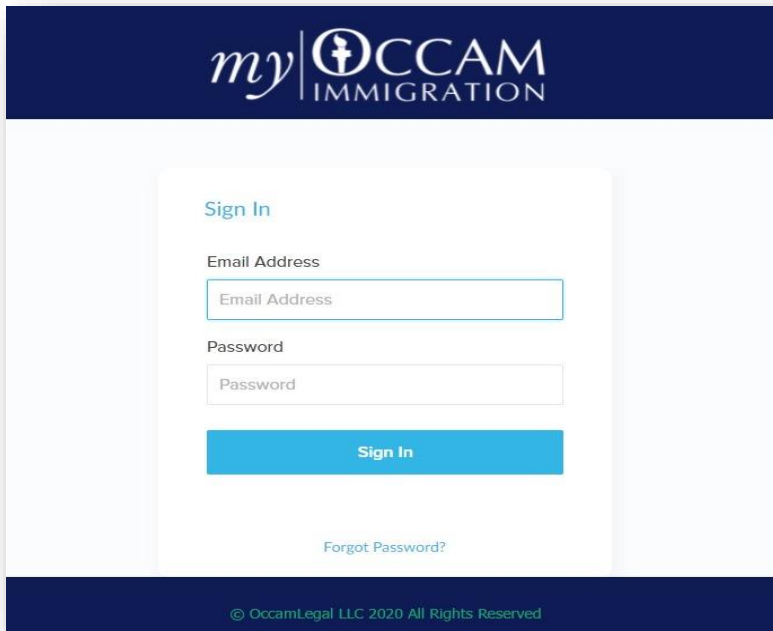


INTEGRATION



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.

CREATOR CUSTOMER PORTAL



myOCCAM IMMIGRATION

Sign In

Email Address

Password

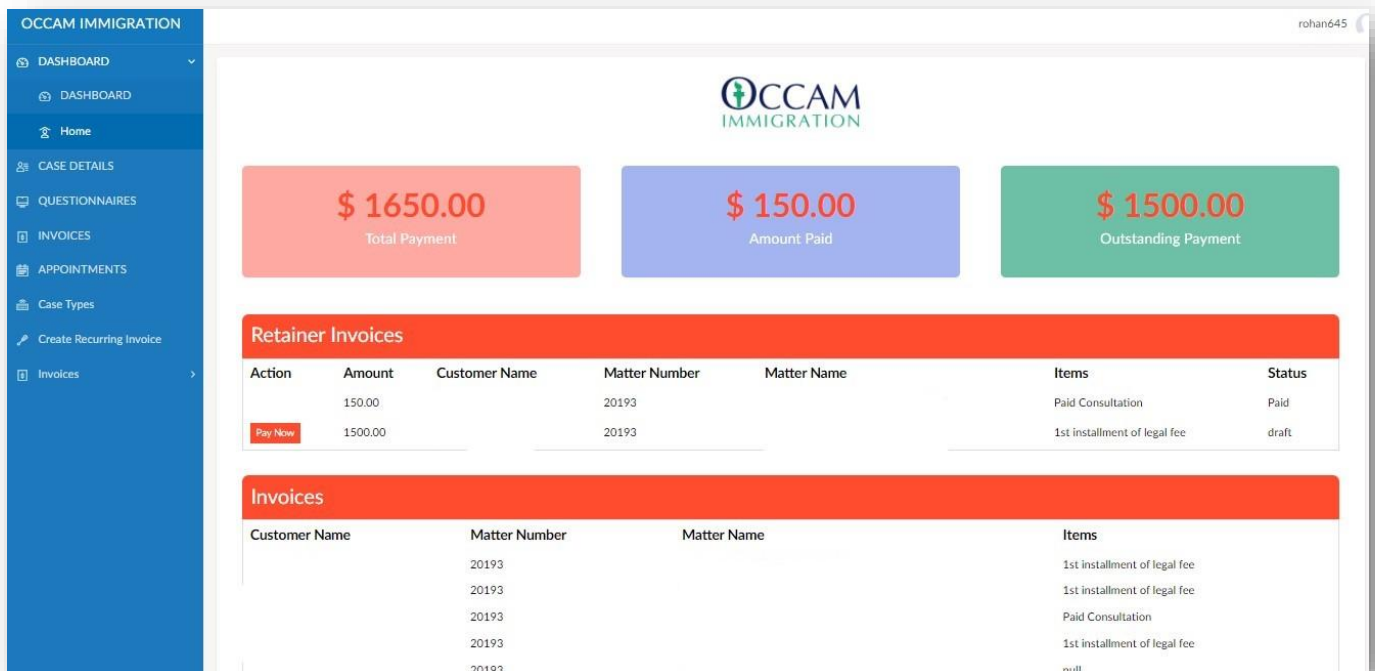
Sign In

[Forgot Password?](#)

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

- Its own matters
- Status of the matter
- Retainer invoices
- Invoices
- Get signed documents with zoho sign.



OCCAM IMMIGRATION

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DASHBOARD

Home

CASE DETAILS

QUESTIONNAIRES

INVOICES

APPOINTMENTS

Case Types

Create Recurring Invoice

Invoices

\$ 1650.00
Total Payment

\$ 150.00
Amount Paid

\$ 1500.00
Outstanding Payment

Retainer 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

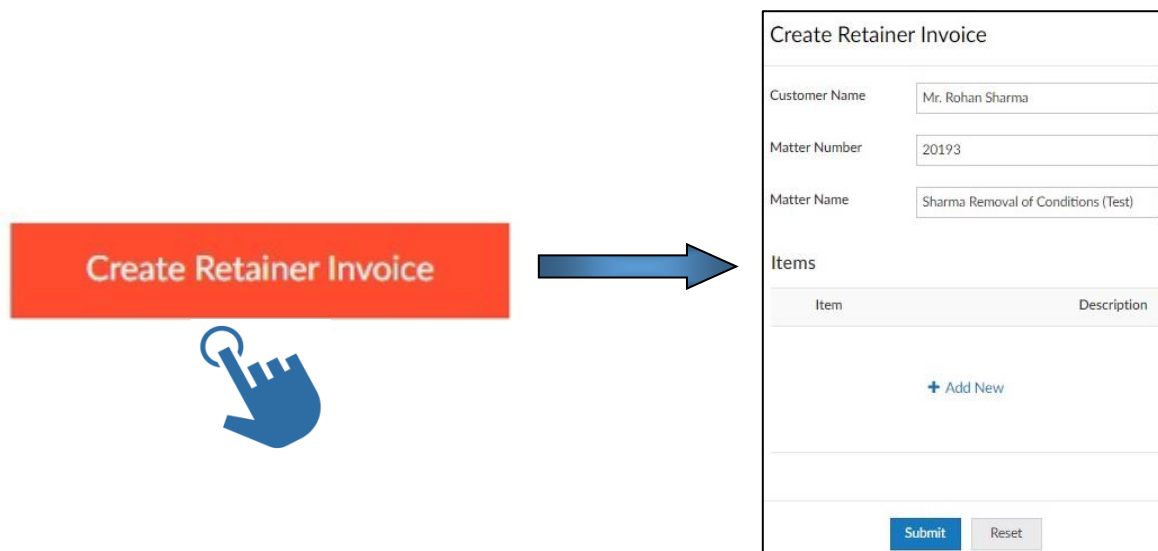
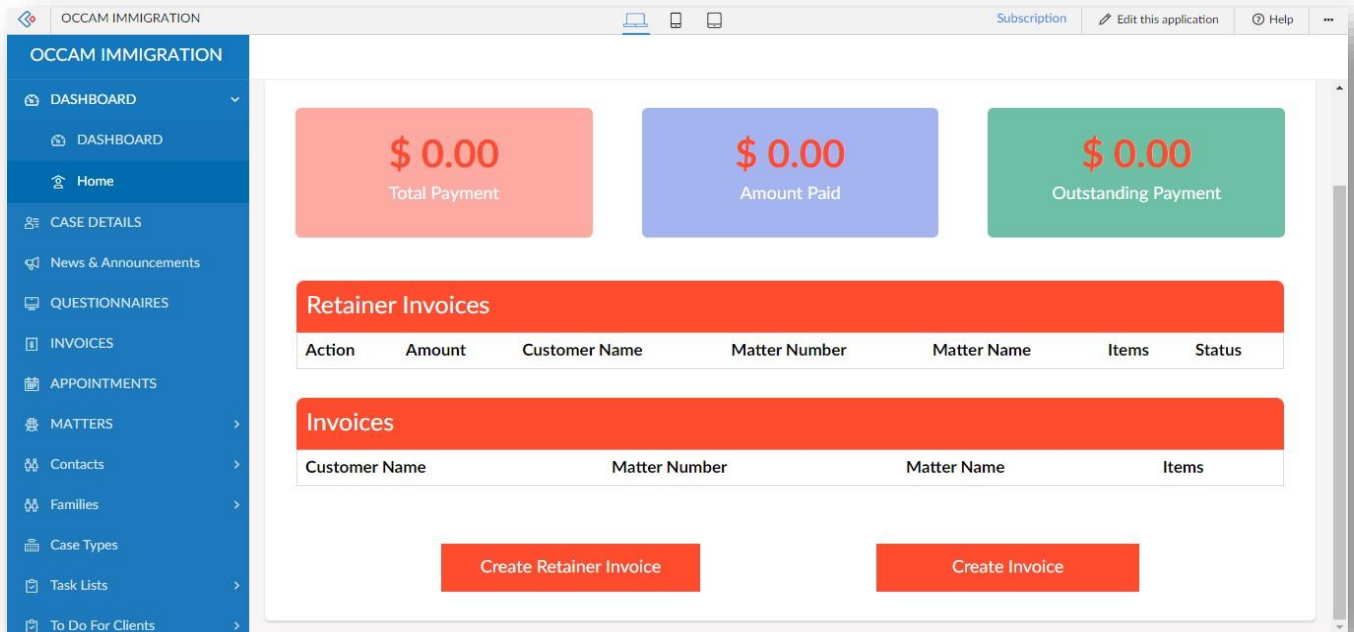
Customer Name	Matter Number	Matter Name	Items
	20193		1st installment of legal fee
	20193		1st installment of legal fee
	20193		Paid Consultation
	20193		1st installment of legal fee
	20193		null

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

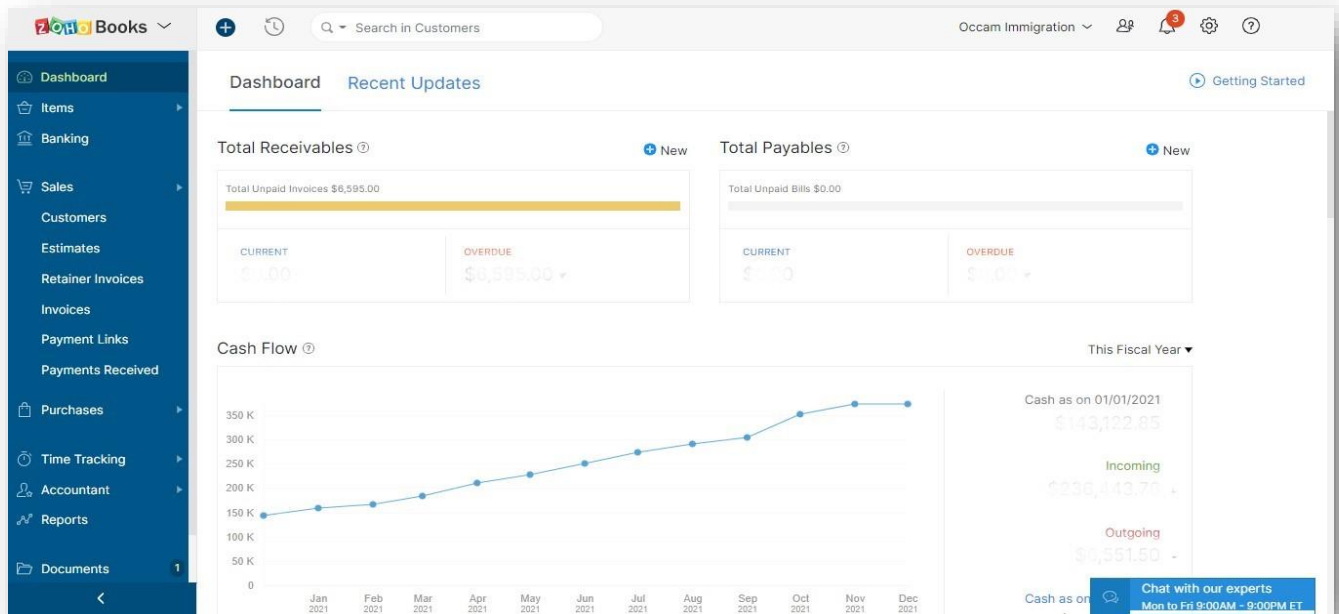
ADMIN PORTAL

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.



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



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.

RESULTS

- ✓ 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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