



“Sokkat Alteeb” is into selling perfumes . They have both Online (Web/Mobile) and Branch sales. Zoho books & Inventory helped them to handle their finance & stock. Zoho Flow helped them to sync their orders between shopify & zoho books to keep all orders and payments under one roof.

# Overview

Client were facing problem in keeping their finance , inventory, orders in one software. Also they were having trouble keeping branch orders and their stock in another software. They wanted to have all sources of orders and its finance & stock under one roof.

Here, we proposed a solution through ZOHO Products for all of their pain areas such as sales, finance and inventory. The product we suggested are Zoho books , Zoho inventory , Zoho Flow & Zoho Analytics .

They also required a reporting tool for their management , where we suggested Zoho analytics synced with zoho books, inventory and also with shopify.

# Executive Summary

**Location :** Riyadh

**Business History :** Client into selling perfumes to various customers , their sales are via store outlets and also as online orders. Online orders are coming either through Web/Mobile app of Shopify software. Their customers are present worldwide and orders are keep coming on an hourly basis from Shopify. Field of Business : Sales

**Nature of Business :** Product Selling

**other customer business-related information :** We had similar kind of clients had online product selling and wanted to maintain their finance & stock and to have integration with their selling platform.

**An opening quote from the customer:**

# Problem Statement & Key Challenges

## Problem Statement:

**Client was lacking in 100% digitalization of their whole end-to-end process**

Due to their orders are in different sources and finance & stock is not synced to it, they are forced to have so much of man power to handle these activities through manual entries into their accounting software. This caused discrepancies in data in terms of order details, payments, shipping & delivery details etc., They were struggling in handling the COD fees and handling fees to their shipping vendors

## Key Challenges:

1. Maintaining inventory between online and branch outlets
2. Maintaining accounting through manual entries
3. High usage of Man power
4. Data discrepancies
5. Data Redundancy
6. Reports for management was not easy
7. Various sources of orders and stages of orders was maintained are present in shopify which was hard to handle manually
8. Customer details were not maintained regularly to have a future sales
9. Manual maintenance of location/warehouse and its ledgers in inventory
10. Manual maintenance of ledgers to have customer payments
11. Returns and refunds were handled manually
12. Cancel order were handled manually
13. Manual entries for Expenses of COD fees & handling fees to vendor.

# Evaluation of the Problem

We have evaluated and understood the problems which are listed below,

1. Orders are from various sources and various locations.
2. Payments are at different stages
3. Various types of orders has its own specification which needs to be handled in its way for both finance and inventory
4. Orders are places, archived , shipped and delivered each stage has some finance or inventory activity to be done
5. Customer database was not maintained properly
6. Products database was not maintained properly
7. Accounting Ledgers with inventory and customer payments were not automated from order itself.
8. Expenses not automated
9. Invoices & payments not automated
10. Shipments and delivery not automated

# Proposed Solution

We have provided 100% digitalization to their whole end-to-end business process and made their day to day life easy.

1. we provided is Integration between Zoho & Shopify
2. Integration through plugin to maintenance products and its stock sync
3. Integration through Zoho flow, We used various flows for various types of orders
4. Each flow had various loops to tag Web , Mobile & POS orders to finance
5. Each loop had various conditions
  - To handle customer creation/updation
  - To create invoice , payments based on archiving or COD order
  - To tag warehouse based on the location of the order
  - To create expenses based on shipment type to that particular vendor
  - To create expenses for COD orders to that particular vendor.
6. Due to Zoho books and inventory sync, their stock maintenance is made easy.
7. Due to Zoho analytics sync with books and with shopify made their reporting easy.
8. Order Returns, Cancels automated via credit notes through zoho flow integration from shopify to books
9. Order status is synced between shopify and books to create shipments and delivery and change the order status
10. Integrated their COD fees and handling fees to shipment vendors via Expenses module in zoho books

# Implementation

1. **Duration** : 3 months
2. **Bottlenecks** : more tasks count used handle the sync between shopify and books
3. **Mitigation** : We have suggested client to purchase task add-ons, api calls
4. **Additional services** :
  - Transaction of migration of orders, invoices, payments before go-live
  - Customization of Zoho books & Inventory

# Result

1. Client per day receiving 500+ orders are seamlessly integration to their finance & inventory
2. During season sales , client will receive 1000+ orders which is also seamlessly integrated to their finance & inventory
3. Taking their year end reports easily as all of their orders and payments are in one place now.



# Final Output

”Sokkat Alteeb” business is now digitalized by Zoho to have a automated single solution for all of their day to day activities in “ZOHO”