



Portfolio of Zoho CRM SETUP- E- Commerce Industry

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VERSION:

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Portfolio of ZOHO

Overview:-

Revinfotech Pvt. Ltd. is a trusted digital transformation partner known for delivering customized CRM and automation solutions across industries like retail, logistics, education, and healthcare. For this project, a leading e-commerce retailer sought our expertise to streamline fragmented operations, reduce manual workloads, and enhance inventory accuracy. By leveraging tools such as **Zoho CRM, Zoho Inventory, Zoho Analytics, and custom-developed APIs**, we delivered an integrated, scalable system that significantly optimized inventory workflows, ensured tax compliance, and improved logistics through real-time synchronization and automation.

1. Project Overview

Industry: Retail & E-commerce

Client Location: United States

Project Duration: 2 Months

CRM Type: Customized Zoho CRM & Inventory with Logistics & Tax Integration

A leading e-commerce client managing a vast catalog of SKUs and a complex logistics network approached Revinfotech for a digital transformation solution focused on automating inventory tracking, integrating shipping systems, and simplifying tax compliance. The goal was to consolidate various operations into a centralized CRM-powered environment that supports scalability, automation, and real-time decision-making.

2. Key Objectives

- Enable custom product attribute management within Zoho Inventory
- Automate product and image synchronization with the e-commerce website
- Implement tax rules based on product categories and customer location
- Integrate with third-party logistics systems (UPS, ShipStation)
- Provide advanced analytics and reporting via Zoho Analytics

3. Our Solution:

Zoho CRM + Inventory Customization

We implemented a tailored Zoho solution that automated and optimized core operations while ensuring scalability and compliance.

- Added custom fields (Brand, Line, Subtype, Tags) for detailed product classification
- Applied dynamic tax rules for product categories and shipping locations
- Synchronized only active items and associated images with the website

Tech: Zoho Inventory + Custom Fields + Workflow Rules + API Triggers

Website Integration via Custom APIs

- Developed secure APIs to sync product data and images between Zoho Inventory and website
- Enabled bi-directional sync automation for real-time updates

Integration: Custom REST APIs + Webhooks

Logistics & Shipping Integration

- Integrated ShipStation and UPS APIs for end-to-end shipment tracking
- Enabled automatic sync of order status and shipping labels

Tech: ShipStation API + UPS Integration + Zoho Flow Automation

Advanced Reporting in Zoho Analytics

- Connected Zoho Inventory, ShipStation, and website data to Zoho Analytics
- Built query tables and pivot charts for insights into invoicing, payments, and inventory trends

Tech: Zoho Analytics + SQL Queries + Visual Dashboards

4. Technical Stack

Component	Details
Backend	Deluge (Zoho Scripting), Custom APIs
Frontend	Zoho CRM Interface + HTML Product Pages
API Integration	ShipStation, UPS, Custom Web API
Reporting	Zoho Analytics + Pivot Tables + Query Tables
Hosting	Zoho Cloud
Security	Role-based Access + API Token Authentication
QA	Manual Testing + Postman Validation

5. Business Impact

Metric	Before Zoho CRM	After Zoho CRM	Improvement
Data Sync Time	Manual, 3–5 hrs/week	Fully Automated	90% time saved
Product Info Accuracy	Inconsistent	Real-Time Sync	100% consistency
Tax Compliance Errors	Frequent	Custom Rule Automation	95% reduction in errors
Shipping Coordination	Manual	Integrated with UPS	Faster delivery & fewer errors
Reporting Capability	Limited	Advanced Dashboards	Real-time analytics

6. Revinfotech's Role

- Conducted thorough analysis of e-commerce operations and website back-end
- Customized Zoho Inventory to handle product complexity and tax requirements
- Built custom APIs for product synchronization
- Integrated third-party logistics platforms
- Delivered advanced analytics dashboards in Zoho Analytics
- Provided training and ongoing post-live support

7. Why Revinfotech?

- Extensive experience in CRM and e-commerce automation
- Certified Zoho Partners with full-stack customization expertise
- Proven capability in logistics, tax, and analytics integrations
- Scalable, business-first solutions with measurable ROI

8. Client Testimonial

Pique Smith – E-commerce Business Owner

“Navdeep and Lalit – from the first day we spoke, I knew instinctively that your product and services were a perfect fit for my business needs. Furthermore, I have been pleasantly surprised by your courteous manners and professionalism coupled with your prompt attention to my countless requests. You patiently 'listened' to all my queries and have relentlessly, in collaboration with your team, found practical solutions. I thank you for all your efforts and wish you continued success.”