



RevInfotech
revolution redefined



Portfolio
of
ZOHO CRM
SETUP- Fintech
Firm

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VERSION:

DATE	AUTHOR	VERSION	CHANGE SUMMARY
June 3 rd , 2025,	Sachin Pandey	1.0	Final Draft

Portfolio of ZOHO

Overview:-

Revinfotech Pvt. Ltd. is a leading provider of CRM and analytics solutions tailored for high-impact industries like financial services, marketing, and human resources. Novistra Capital, a distinguished financial services firm, partnered with us to modernize their data management by creating an integrated dashboard system. By using **Zoho Analytics, Excel integration, and custom API automation**, we delivered a robust, real-time data visualization solution that unified scattered metrics and empowered faster business decisions.

1. Project Overview

Industry: Financial Services, Marketing, HR

Client Location: United States

Project Duration: 1 Month

CRM Type: Zoho Analytics with Custom Excel Integration

Novistra Capital needed a comprehensive and visually dynamic dashboard solution that would integrate data from Zoho apps and custom Excel files. Their existing processes involved manual data collection and analysis, which delayed reporting and impacted decision-making. Our team built an automated and real-time dashboard system that delivered clarity, speed, and efficiency.

2. Key Objectives

- Eliminate manual data merging and reduce errors.
- Integrate custom Excel data with Zoho Analytics.
- Enable real-time insights into financial and operational metrics.
- Build visually interactive dashboards for executive decision-makers.
- Automate recurring tasks with workflows and custom APIs.

3. Our Solution:

Zoho Analytics + Excel + Custom API Integration

We developed an integrated solution using Zoho Analytics as the primary reporting engine, with automated data feeds from Excel and Zoho applications.

Custom API Development

- Built APIs to sync Excel data with Zoho Analytics on a daily schedule.
- Enabled smooth integration of multi-source data, ensuring consistency.

Tech: Custom REST APIs + Scheduler Scripts

Excel Data Structuring & Sync

- Reformatted Excel files to match Zoho Analytics schema.
- Set up automated scripts to update Excel and trigger sync.
- Ensured daily reflection of accurate data in dashboards.

Tech: Excel Automation + Sync Logic

Zoho Analytics Dashboards

- Created interactive dashboards with KPIs and visual summaries.
- Integrated Zoho CRM, Excel, and other sources into a single view.
- Designed UI for ease of navigation and executive usability.

Platform: Zoho Analytics + Embedded Dashboards

Automation Workflows

- Streamlined data collection and transfer processes.
- Reduced human intervention with event-based triggers.
- Minimized errors through validation checkpoints.

Tools: Zoho Automation

4. Technical Stack

Component	Details
Backend	Custom APIs, Zoho Deluge
Frontend	Zoho Analytics Dashboards
API Integration	Excel, Zoho CRM, External Data Sources
Reporting	Zoho Analytics with Excel Data Pipelines
Hosting	Zoho Cloud
Security	SSL, Role-based Data Access
QA	Manual Testing + Sync Validation

5. Business Impact

Metric	Before Implementation	After Implementation	Improvement
Data Consolidation Time	Manual & slow	Automated & seamless	90% time saved
Data Accuracy	Prone to errors	Synced & verified	95%+ consistency
Report Delivery	Delayed	Real-time dashboards	Immediate access
Decision-Making Speed	Reactive	Proactive	Faster market response
Dashboard Accessibility	Fragmented	Centralized	Improved visibility

6. Revinfotech's Role

- Analyzed client's existing Excel and Zoho data structure.
- Created a data model compatible with Zoho Analytics.
- Developed custom APIs for seamless daily synchronization.
- Built executive dashboards tailored to key metrics.
- Implemented automation and trained internal teams.

7. Why Revinfotech?

- Proven expertise in Zoho Analytics and data automation.
- Specialized in financial services and dashboard strategy.
- End-to-end delivery: Architecture → Development → Training.
- Strong focus on real-time business intelligence.
- Fast, secure, and scalable implementation model.

8. Client Testimonial

Vighnesh Hariharan – Director, Novistra Capital

“Revinfotech’s Team – were extremely helpful and patient with our requirements and completed our requests with promptness and great efficiency

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