



Client Name: Vishal

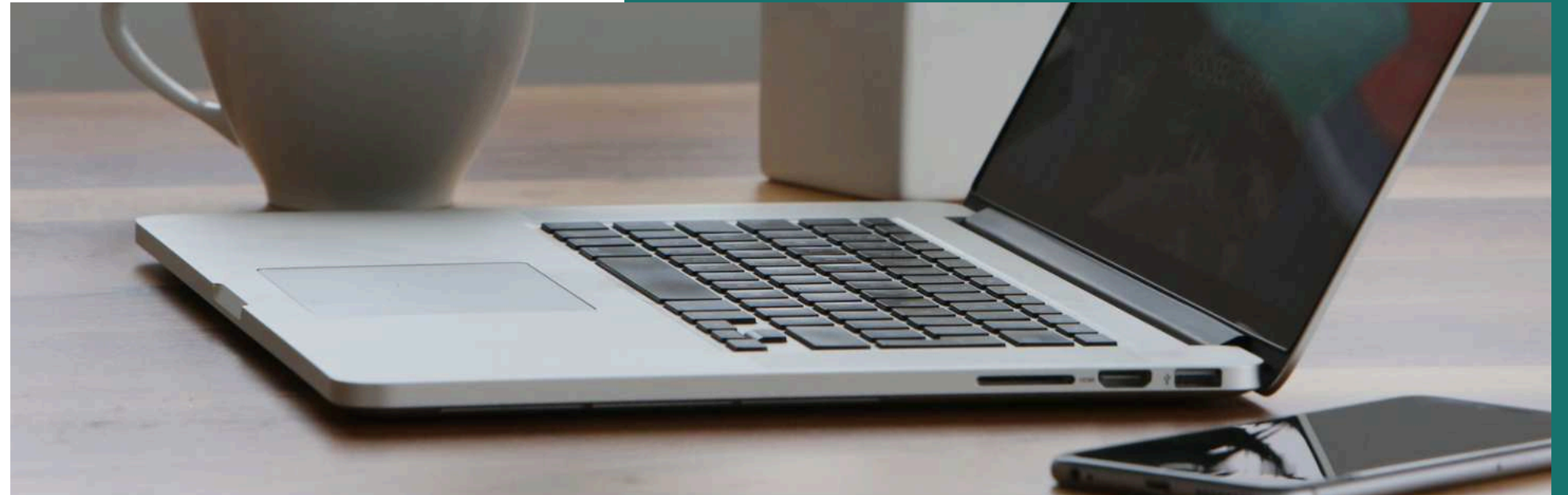
Country: India

Total user: 140

Subscription: ZOHO One



ABOUT AIMLAY



Aimlay is a leading education platform that transforms the learning experience through innovative digital solutions. They provide interactive tools and resources designed to enhance education for both students and educators. Their platform features engaging online courses, advanced learning management systems, and interactive content tailored to diverse educational needs. Committed to accessibility and effectiveness, Aimlay empowers users with cutting-edge technology to achieve their academic goals and drive success in the evolving educational landscape. By focusing on quality and user experience, Aimlay strives to create a dynamic and impactful learning environment.



PROJECT OVERVIEW

The comprehensive implementation of Zoho solutions for Aimlay focused on improving operations across various departments. This project integrated multiple Zoho applications, including Zoho CRM, Zoho Desk, Zoho Projects, Zoho Creator, and Zoho Campaigns. The goal was to enhance efficiency, improve customer interactions, and support internal processes, resulting in a more effective operational framework for the client.

PROJECT OBJECTIVE

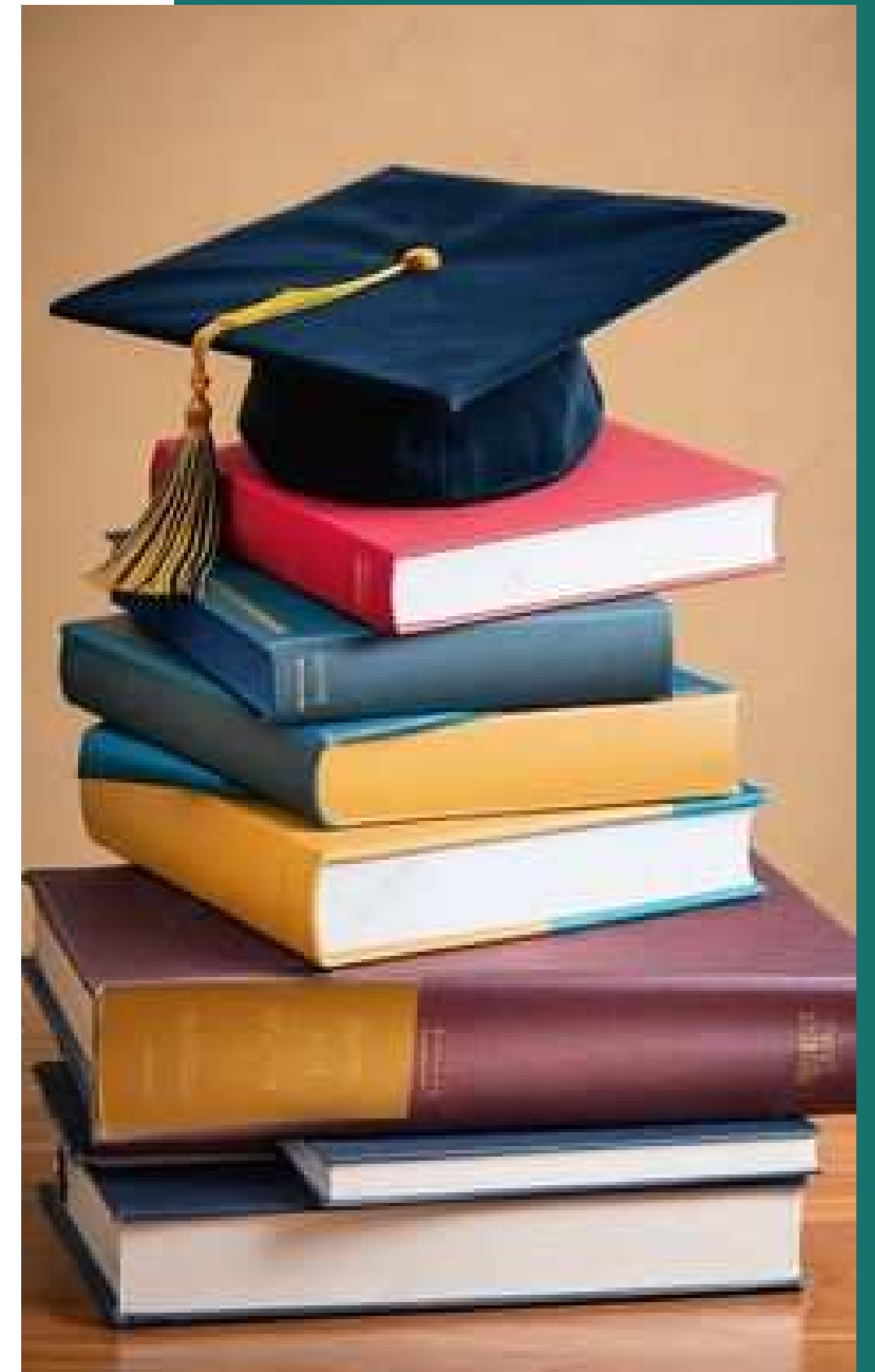
The primary objectives of this project included migrating existing data and processes to the Zoho ecosystem to ensure effective integration. A centralized system was established for managing leads, customers, and projects, which facilitated better organization and accessibility of information. Key processes were automated to enhance operational efficiency and reduce manual workloads. Additionally, effective communication and reporting tools were enabled to support improved decision-making throughout the organization.



CHALLENGES

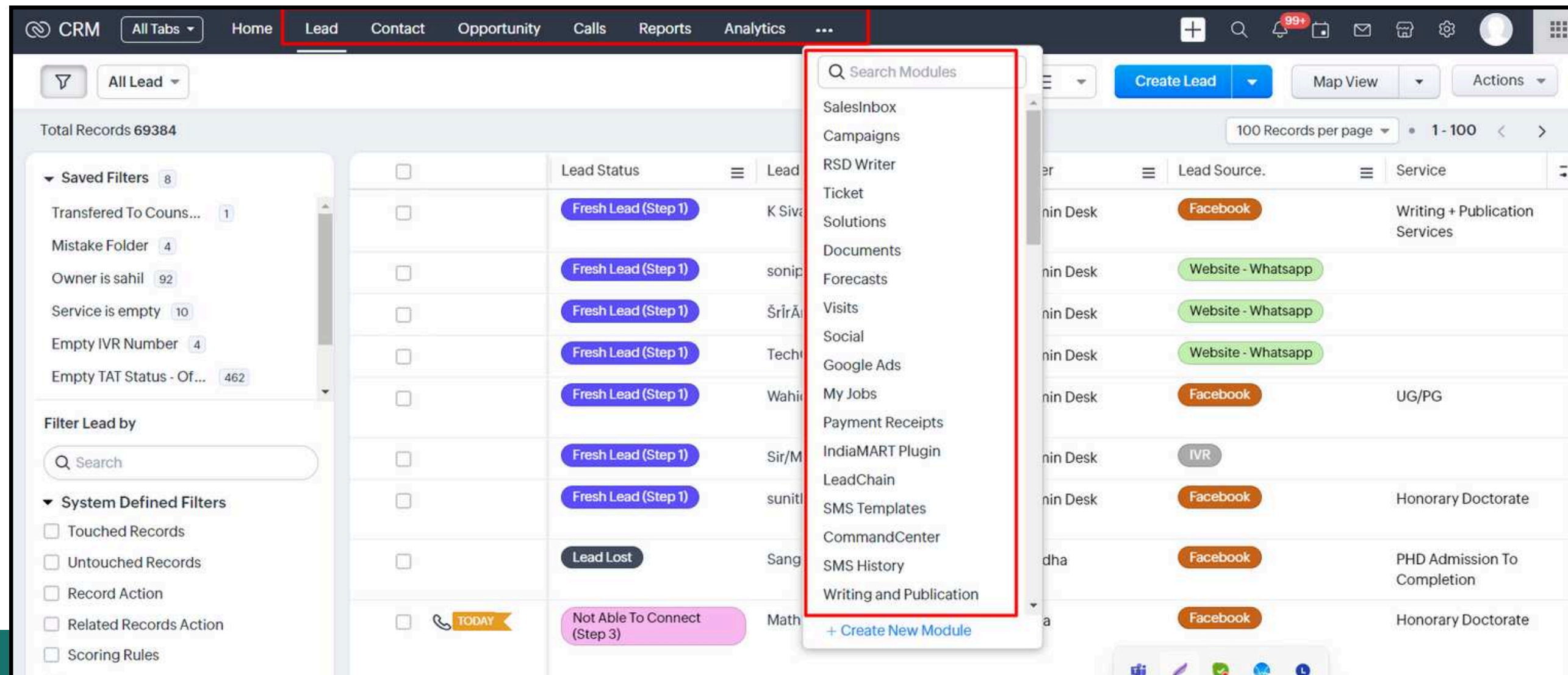
Major challenges we encountered during the implementation for Aimlay included resistance to change from staff, which can often arise when transitioning to new systems. There were also time constraints that limited the development and training phases, making it crucial to ensure that all team members could adapt quickly to the new tools. Additionally, resource allocation posed difficulties, as balancing project demands with existing responsibilities required careful management. Customization requirements added another layer of complexity, as tailoring the Zoho solutions to meet Aimlay's specific operational needs necessitated detailed planning and execution.

Ensuring that all integrated applications worked together smoothly while addressing these challenges was essential to achieving the project goals. Despite these obstacles, Unicloud IT Services remained committed to delivering a cohesive system that would enhance Aimlay's operational capabilities and customer interactions.



FUNCTIONALITY AND FEATURES

- Module Creation: Customized modules were developed and integrated across various Zoho applications to address specific business requirements effectively.



- Forms and IVR Integration: Custom forms were created within the modules, and IVR integration was established to capture and record calls efficiently.

CRM | All Tabs ▾ | Home | **Lead** | Contact | Opportunity | Calls | Reports | Analytics | ...

+ 🔍 99+ 📅 📧 📁 ⚙️ 👤

🔍 All Lead ▾ | ⋮ ▾ | Create Lead ▾ | Map View ▾ | Actions ▾

Total Records 69384 | 100 Records per page ▾ | 1 - 100 < >

<input type="checkbox"/>		Created Time	Mobile	Lead Status	Lead Name	Lead Owner
<input type="checkbox"/>	☎️ TODAY	11/10/2024 01:29 PM	📞	Not Able To Connect (Step 3)		
<input type="checkbox"/>		11/10/2024 01:57 PM	📞	Fresh Lead (Step 1)		
<input type="checkbox"/>	☎️ TODAY	11/10/2024 01:56 PM	📞	Not Able To Connect (Step 3)		
<input type="checkbox"/>		11/10/2024 02:38 PM	📞	Fresh Lead (Step 1)		
<input type="checkbox"/>		11/10/2024 02:33 PM	📞	Fresh Lead (Step 1)		
<input type="checkbox"/>		11/10/2024 02:29 PM	📞	Fresh Lead (Step 1)		
<input type="checkbox"/>	☎️ TODAY	11/10/2024 01:46 PM	📞	Not Able To Connect (Step 3)		
<input type="checkbox"/>		11/10/2024 01:31 PM	📞	Lead Lost		
...	☎️ TODAY	11/10/2024 02:02 PM	📞	Not Able To Connect (Step 3)		

Saved Filters 8

- Transferred To Couns... 1
- Mistake Folder 4
- Owner is sahil 92
- Service is empty 10
- Empty IVR Number 4
- Empty TAT Status - Of... 462

Filter Lead by

🔍 Search

System Defined Filters

- ☐ Touched Records
- ☐ Untouched Records
- ☐ Record Action
- ☐ Related Records Action
- ☐ Scoring Rules

- Lead Filters: Filters were applied based on lead fields to enhance data management and organization.

DATA INTEGRATION

integration of Various Online Platforms and Data Sources: Connected multiple online platforms and data sources, including:

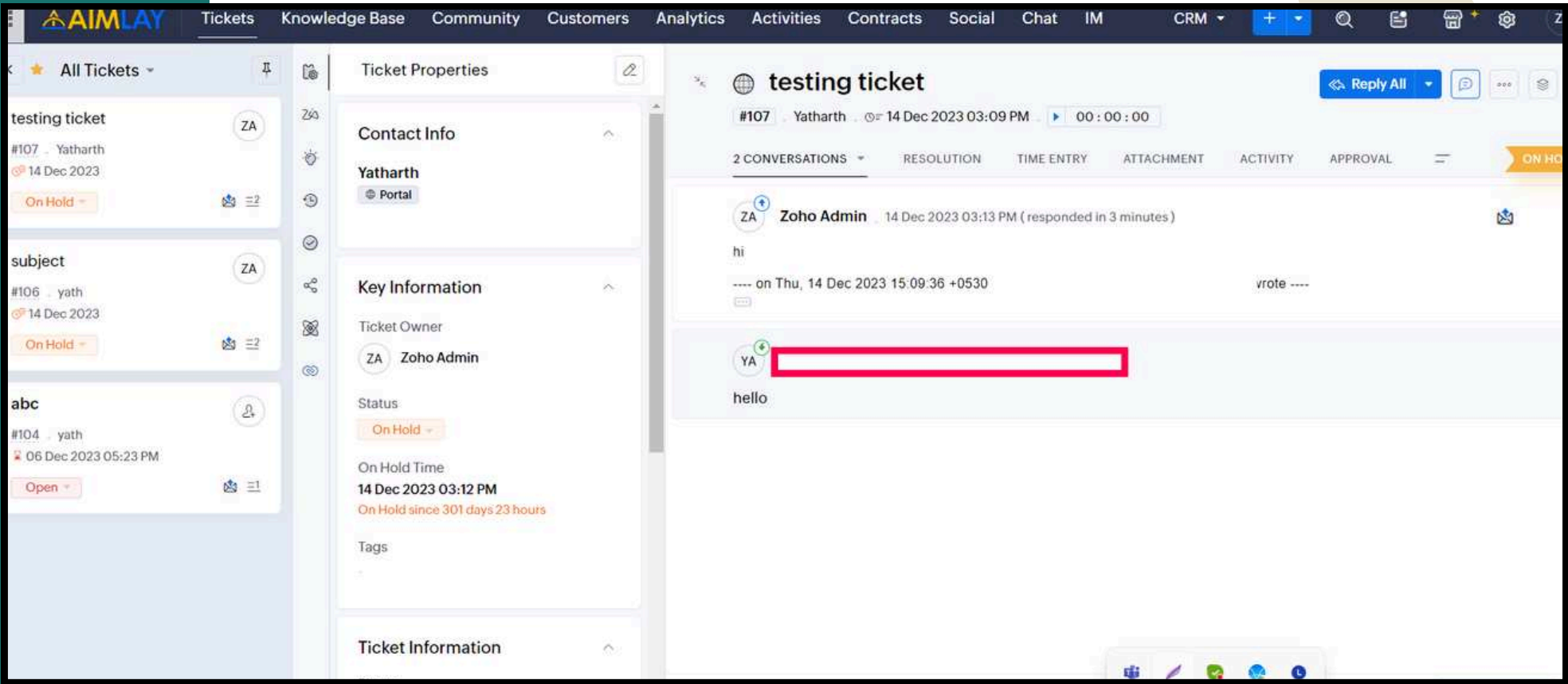
- Customer and Employee Referrals
- Social Media Platforms
- Marketplaces
- University Referrals
- Website Interactions

The screenshot displays a CRM interface with a top navigation bar containing tabs for CRM, All Tabs, Home, Lead, Contact, Opportunity, Calls, Reports, and Analytics. The 'Lead' tab is active. Below the navigation bar, there's a sidebar on the left with a 'Saved Filters' section highlighted by a red box. This section lists filters such as 'Transferred To Couns...', 'Mistake Folder', 'Owner is sahil', 'Service is empty', 'Empty IVR Number', and 'Empty TAT Status - Of...'. Below this is a 'Filter Lead by' section with a search bar and 'System Defined Filters' including 'Touched Records', 'Untouched Records', 'Record Action', 'Related Records Action', 'Scoring Rules', and 'Locked'. The main area shows a table of leads with columns for Created Time, Mobile, Lead Status, Lead Name, and Lead Owner. Each row represents a lead, with a checkbox, a timestamp, a mobile number, a status button labeled 'Fresh Lead (Step 1)', and the owner 'ZOHO Admin Desk'. The table indicates 69,389 total records and shows 100 records per page.

	Created Time	Mobile	Lead Status	Lead Name	Lead Owner
<input type="checkbox"/>	11/10/2024 02:47 PM	1	Fresh Lead (Step 1)		ZOHO Admin Desk
<input type="checkbox"/>	11/10/2024 02:39 PM		Fresh Lead (Step 1)		ZOHO Admin Desk
<input type="checkbox"/>	11/10/2024 02:50 PM		Fresh Lead (Step 1)		ZOHO Admin Desk
<input type="checkbox"/>	11/10/2024 02:50 PM		Fresh Lead (Step 1)		ZOHO Admin Desk
<input type="checkbox"/>	11/10/2024 02:47 PM		Fresh Lead (Step 1)		ZOHO Admin Desk
<input type="checkbox"/>	11/10/2024 02:42 PM		Fresh Lead (Step 1)		ZOHO Admin Desk
<input type="checkbox"/>	11/10/2024 02:42 PM		Fresh Lead (Step 1)		ZOHO Admin Desk
<input type="checkbox"/>	11/10/2024 02:30 PM		Fresh Lead (Step 1)		ZOHO Admin Desk
<input type="checkbox"/>	11/10/2024 02:38 PM		Fresh Lead (Step 1)		ZOHO Admin Desk
<input type="checkbox"/>	11/10/2024 02:37 PM		Fresh Lead (Step 1)		ZOHO Admin Desk
<input type="checkbox"/>	11/10/2024 02:33 PM		Fresh Lead (Step 1)		ZOHO Admin Desk

ZOHO DESK

- Ticket Module Creation: A robust ticketing system was developed, enabling customers to easily create and close tickets directly within the platform.

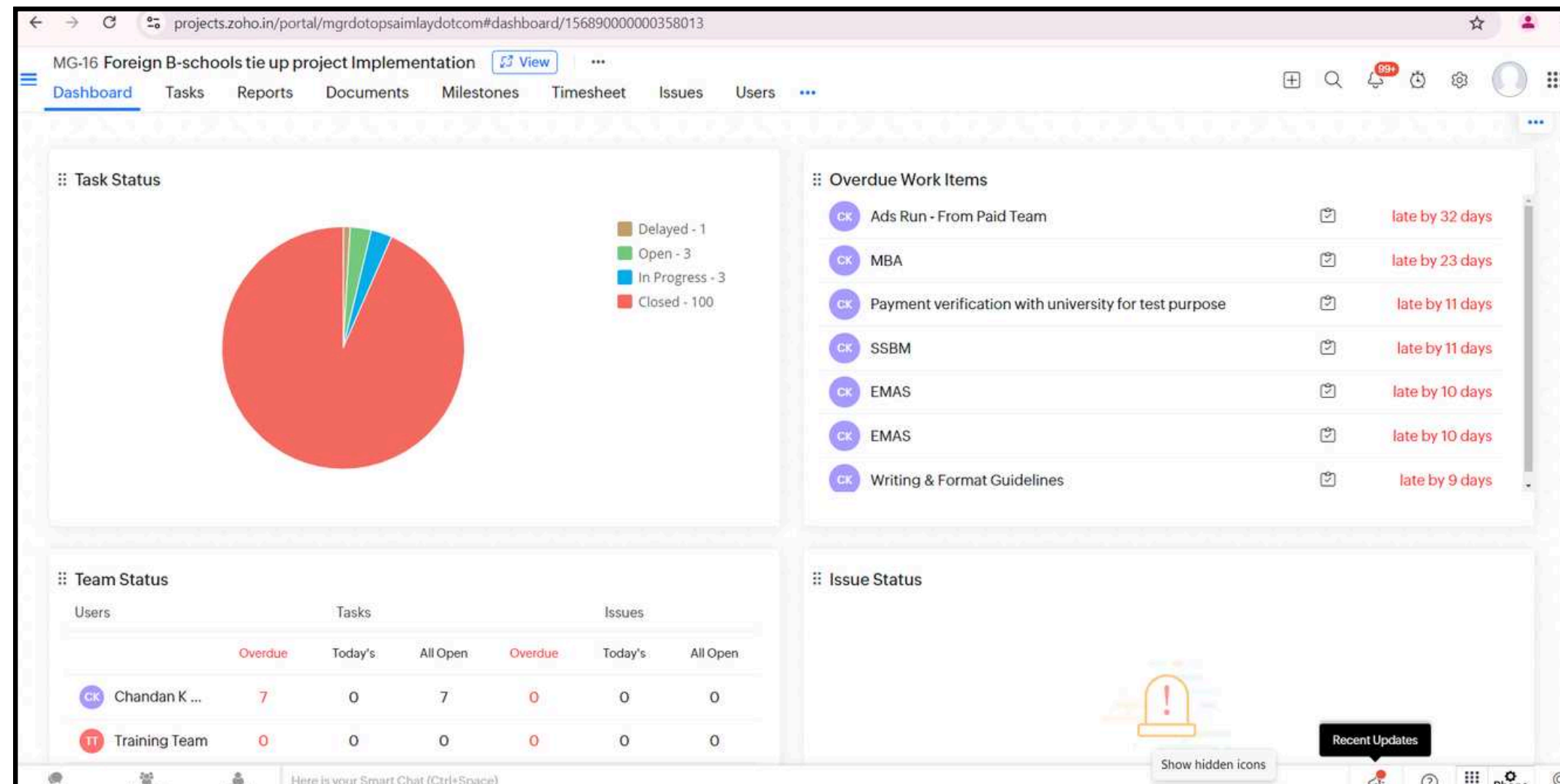
The screenshot shows the Zoho CRM Reports dashboard. It features a sidebar with navigation options like 'All Reports', 'My Reports', 'Favorites', 'Recently Viewed', 'Shared Reports', 'Scheduled Reports', 'Recently Deleted', 'B2B Account and Contact Rep...', 'Opportunity Reports', 'Lead Reports', 'Campaign Reports', 'Ticket and Solution Reports', 'Product Reports', and 'RSD Writer Reports'. The main area displays a table of reports with columns for Report Name, Description, Folder, Last Accessed Date, and Created By.

Report Name	Description	Folder	Last Accessed Date	Created By
Book Sale ID	To Cross check Sales	MIS Marketing PMS	15 min ago	MIS Team
FOR LMS	-	Audit Custom	1 hr ago	Audit Desk
Untitled	-	Audit Custom	1 hr ago	Audit Desk
Yesterday Paid Leads	For Paid Leads PMS	MIS Marketing PMS	2 hrs ago	MIS Team
Yesterday's Fresh Paid Lead Assigned	For Paid Lead PMS	MIS Marketing PMS	2 hrs ago	MIS Team
Total Assigned Paid Lead	For Paid Lead PMS	MIS Marketing PMS	2 hrs ago	MIS Team
Total Assigned Organic Lead	For Organic PMS	MIS Marketing PMS	2 hrs ago	MIS Team
Overall AR after invoice_Cloned	-	Audit Custom	3 hrs ago	Audit Desk
Yesterday's Fresh Organic Lead Assigned	For Ayush Shukla PMS	MIS Marketing PMS	3 hrs ago	MIS Team
Yesterday Organic Leads	For Ayush Shukla PMS	MIS Marketing PMS	3 hrs ago	MIS Team
Accounts Collectable Report	-	VM Dashboard	3 hrs ago	ZOHO Admin Desk
proposal level	-	Audit Custom	3 hrs ago	Audit Desk
Shakeel Sir Assigning History - Monthly ...	-	RSD	3 hrs ago	ZOHO Admin Desk

- Dashboard Setup: A dashboard was designed for super admins to monitor key ticket metrics, including creation rates, closure statistics, and priority levels.

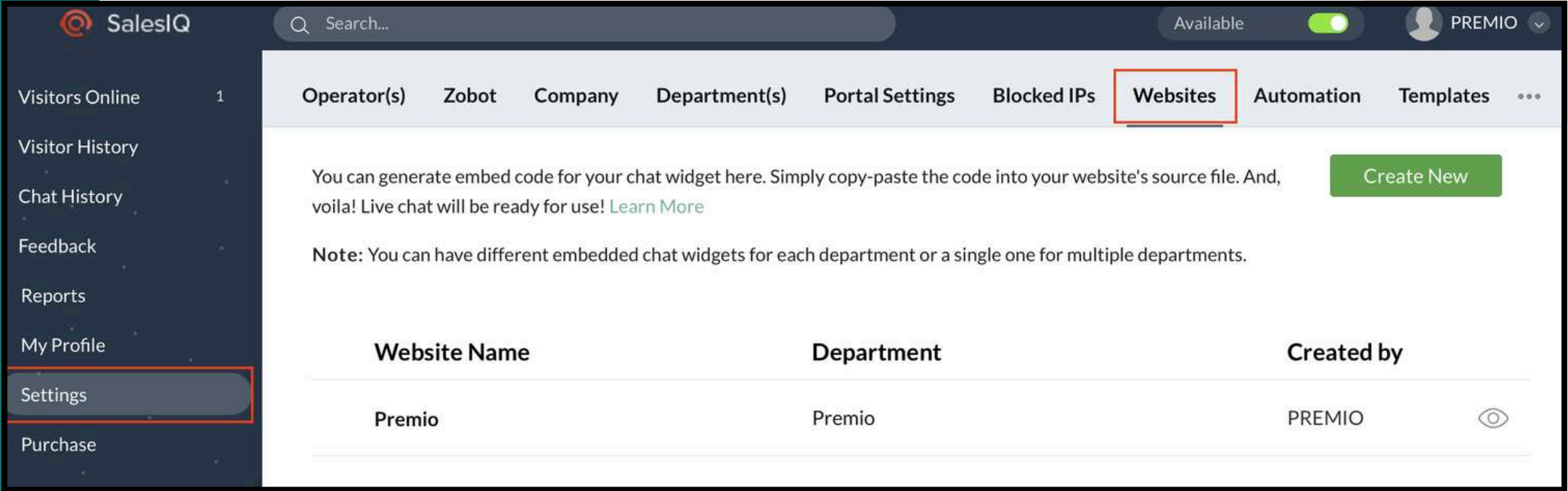
ZOHO PROJECTS

- Home Page and Analytics: Developed a home page featuring analytics tools for effective project tracking and performance monitoring.
- Approval Processes: Established workflows and approval processes to effectively manage project stages and enhance operational efficiency.



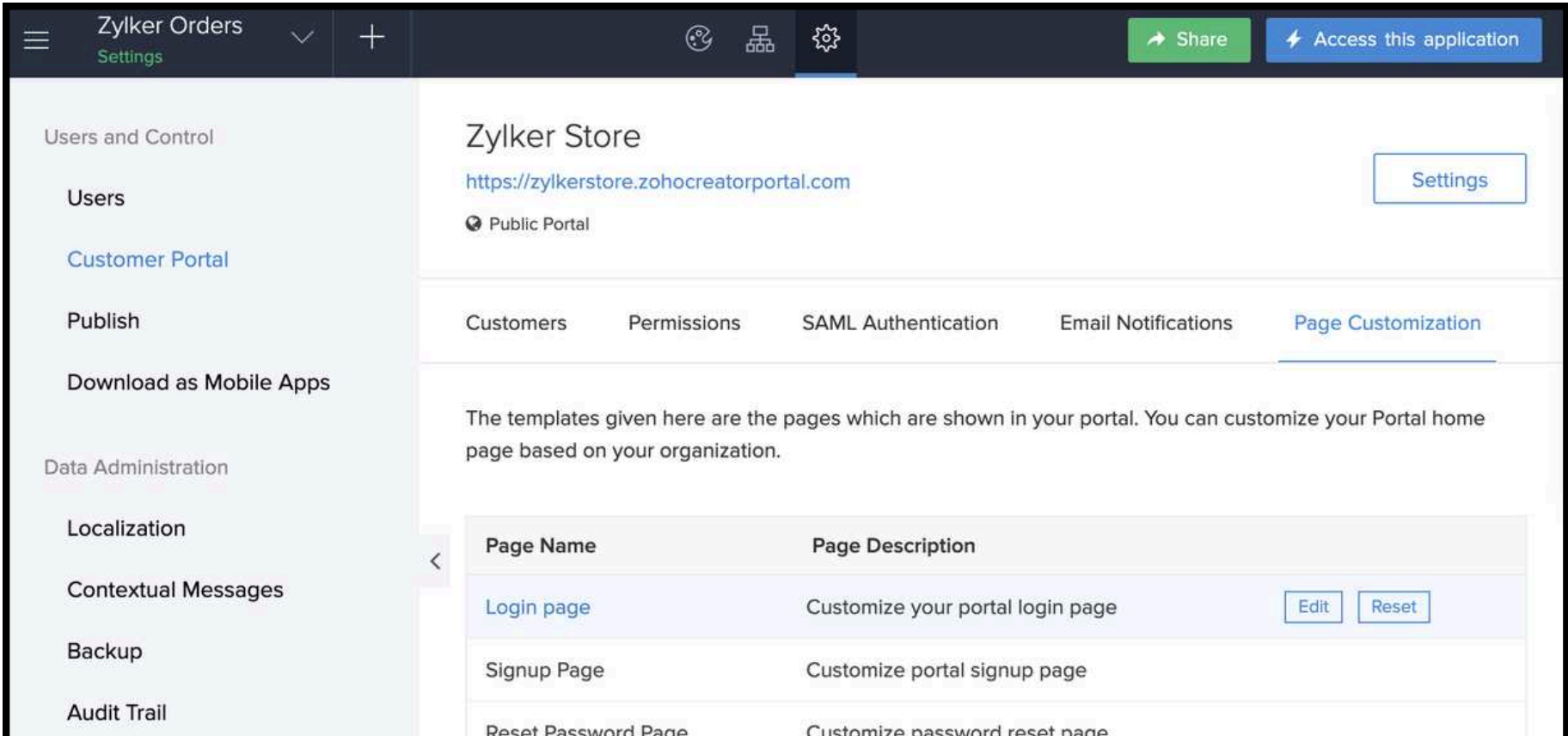
CUSTOMER ENGAGEMENT (ZOHIO SALESIQ)

- Live Chatbot: Created and integrated a live chatbot on the website that automatically captures leads from customer interactions.



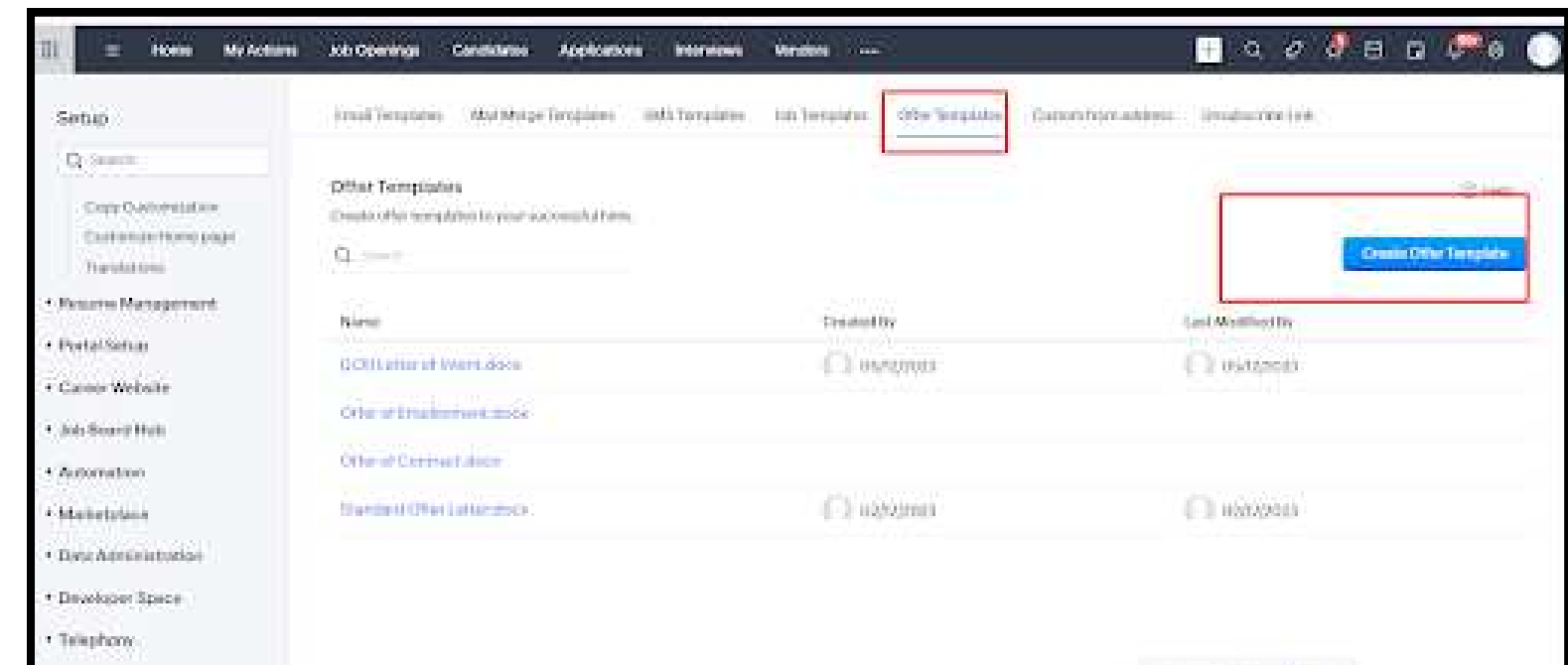
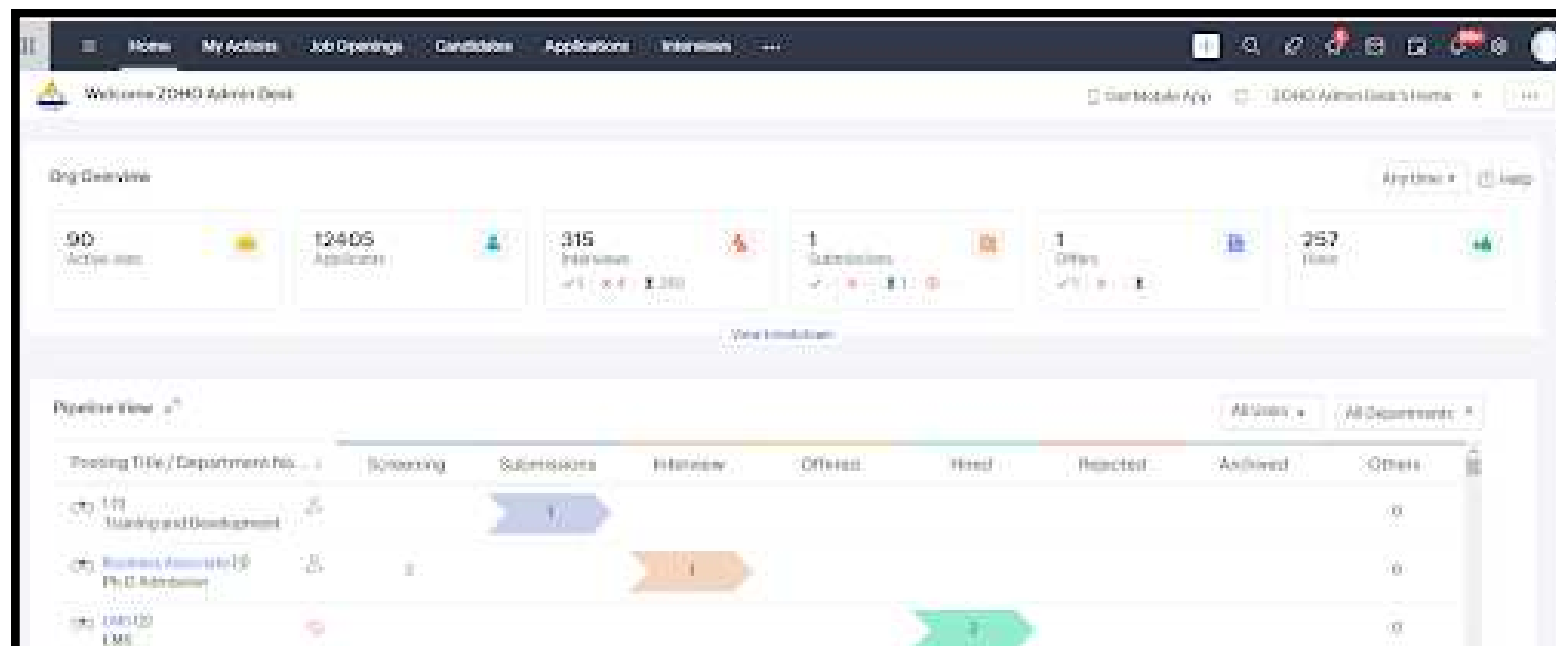
ZOHIO CREATOR

- Custom Applications: Developed tailored applications to meet Aimlay's specific needs, including features for a customer portal and user management.



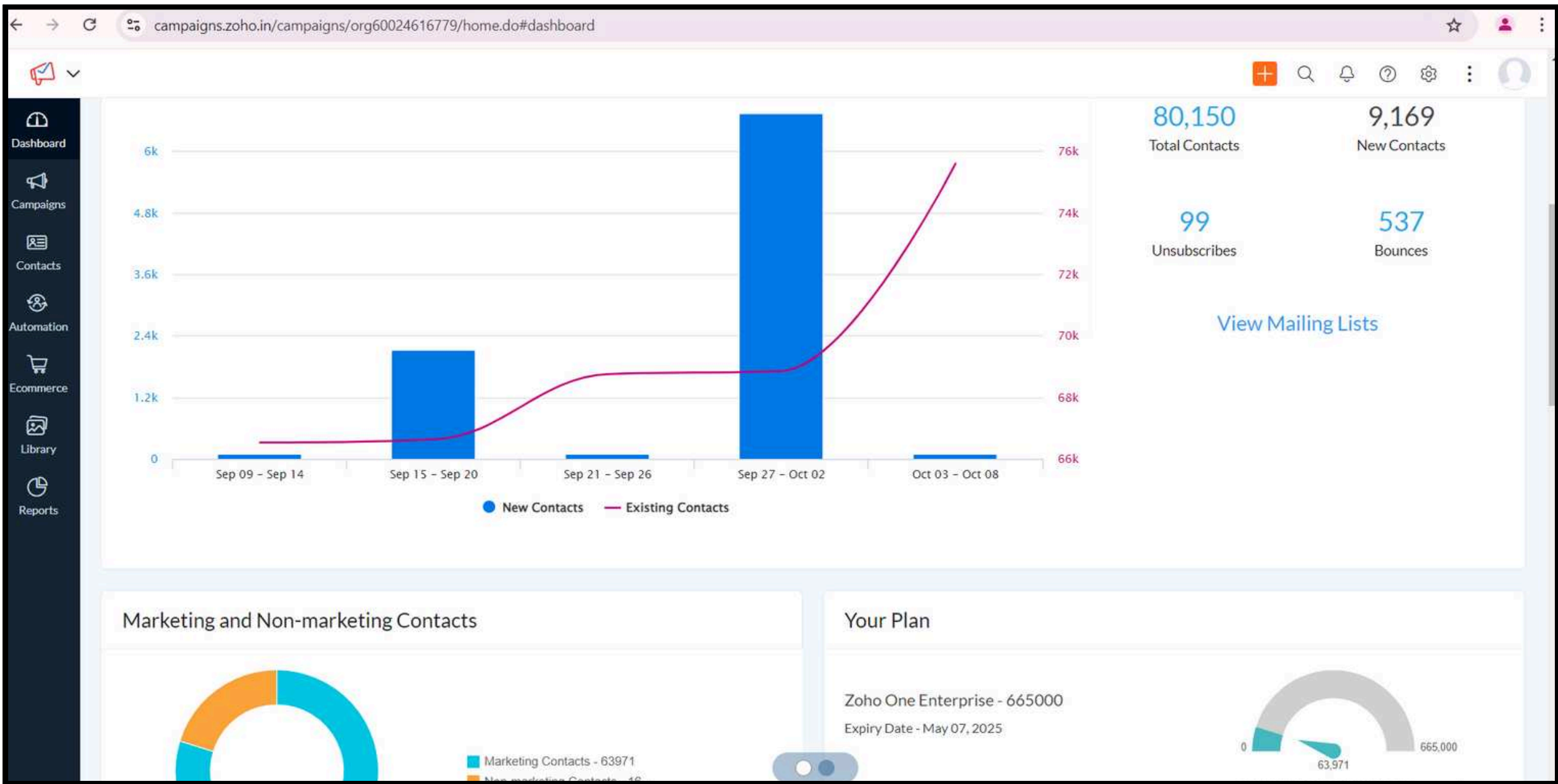
ZOHO RECRUIT

- Hiring Pipeline: Established a hiring pipeline that incorporates workflow rules, approvals, and scheduling to streamline the interview process.



ZOHO CAMPAIGNS

- Email Campaigns: Developed automated email campaigns to enhance customer engagement and nurture leads. These campaigns use targeted messaging for specific audience segments, ensuring relevance. Automation enables consistent outreach, engagement tracking, and performance optimization,



CONCLUSION

In conclusion, the project successfully transformed Aimlay's operations through the implementation of a robust and integrated suite of Zoho solutions tailored to their specific needs. By addressing challenges such as change management and resource limitations, we created a cohesive system that enhanced efficiency, improved customer engagement, and facilitated better data management. The integration of various functionalities—from CRM and project management to recruitment and marketing—empowered Aimlay to operate more effectively and respond quickly to customer demands. This collaborative effort not only achieved the immediate project goals but also positioned Aimlay for sustained growth and success in the future.

ABOUT US

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 providing dedicated services for ZOHO products to its clients. Unicloud has a high rate of client retention and successful deliveries. We have more than 4000+ customers to whom we have provided the services and been providing support. Unicloud has completed 897+ Projects along with more than 4000+ satisfied customers and with a project succession rate of 95% to date and continuously working on more projects from different industries.



<https://www.uniclouditservices.com/>