



TAGFI PROJECT

ZOHO ONE IMPLEMENTATION



BUILT BY:
UNICLOUD IT SERVICES



INTRODUCTION

The client company was one of the leading industry of New York and TagFi partner. So TagFi is directly dealing with all the operations. It is a voluntary partnership of businesses and professionals working together to build a healthy economy. It's a non-profit economic development organization. TagFi admin is prepared in Laravel PHP framework.



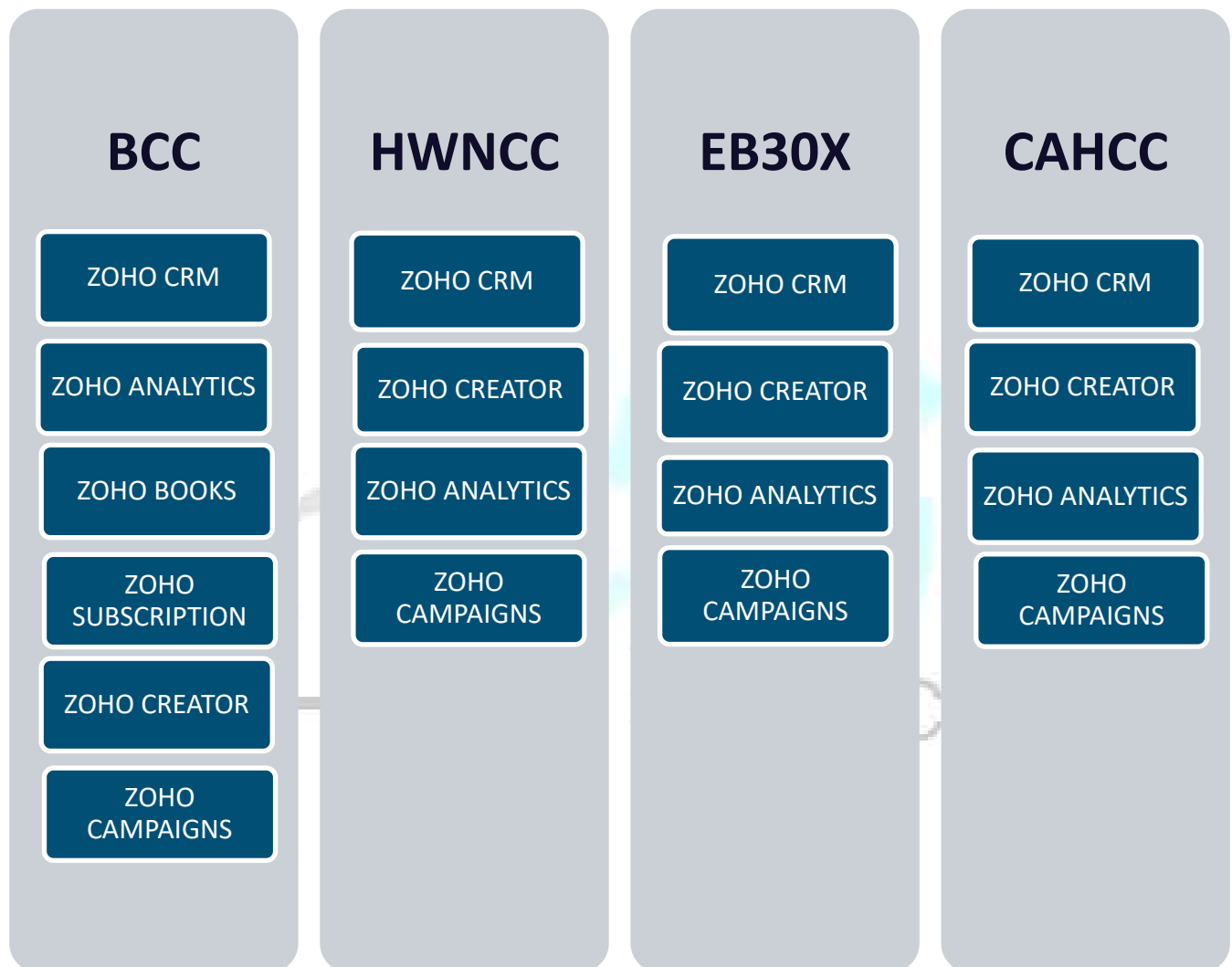
REQUIREMENTS

- Mainly they want a stalk of business solution for **whitelabeled user clients** as per their requirements.
- Need systematic distribution of leads, contacts, invoices etc. of different clients.
- TagFi - ZOHO integration
- Payment gateway integration
- Customized CRM was the major requirement.

ZOHO ONE applications which made a complete Platform for them includes:

- **ZOHO CRM – Vertical CRM**
- **ZOHO BOOKS**
- **ZOHO SUBSCRIPTION**
- **ZOHO CREATOR**
- **ZOHO ANALYTICS**
- **ZOHO CAMPAIGNS**

Client have 4 whitelabel clients:



Platforms used by different user clients.

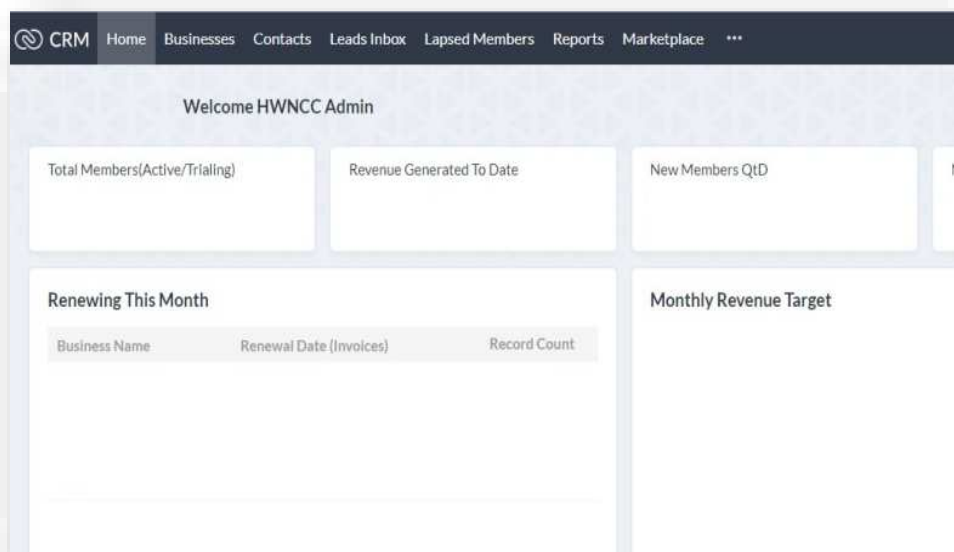
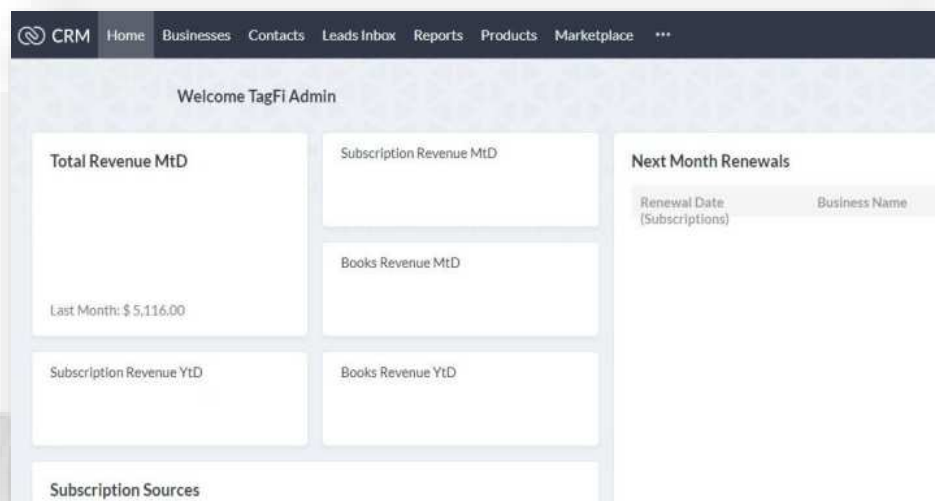
In addition a demo user account is also developed for the purpose of testing before implementations.

(as client is operating on large scale so need testing before implementing major changes)

IMPLEMENTATION:

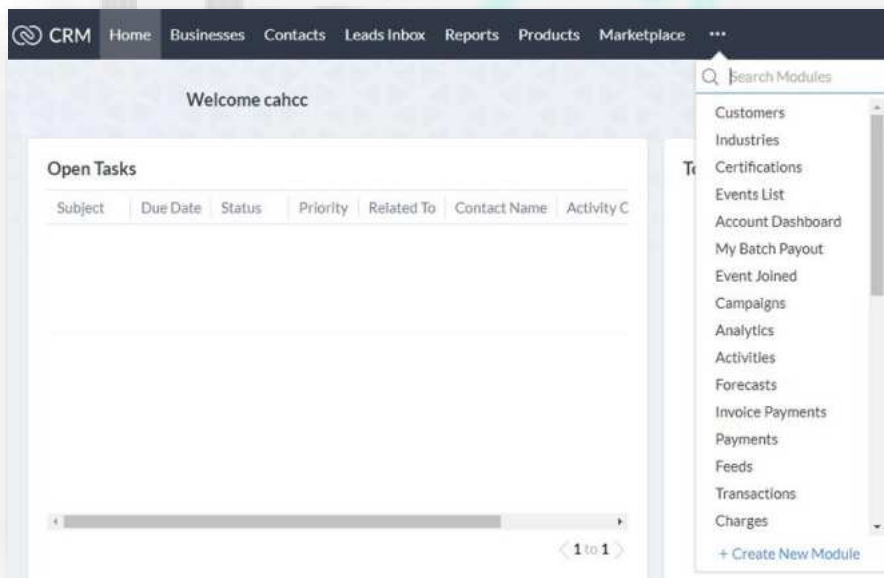
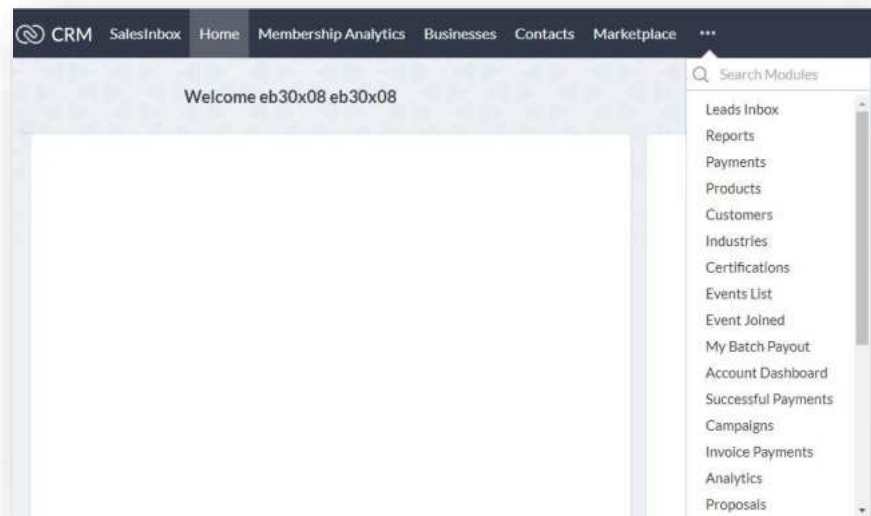
CUSTOMIZED CRMS:—

BCC CRM



HWNCC CRM

EB30X CRM



CAHCC CRM

So, we have customized web-tabs of all the clients according to their needs and relevance and the final CRM system delivered was great for tracking the service offerings of their clients which best suites their unique business requirements.

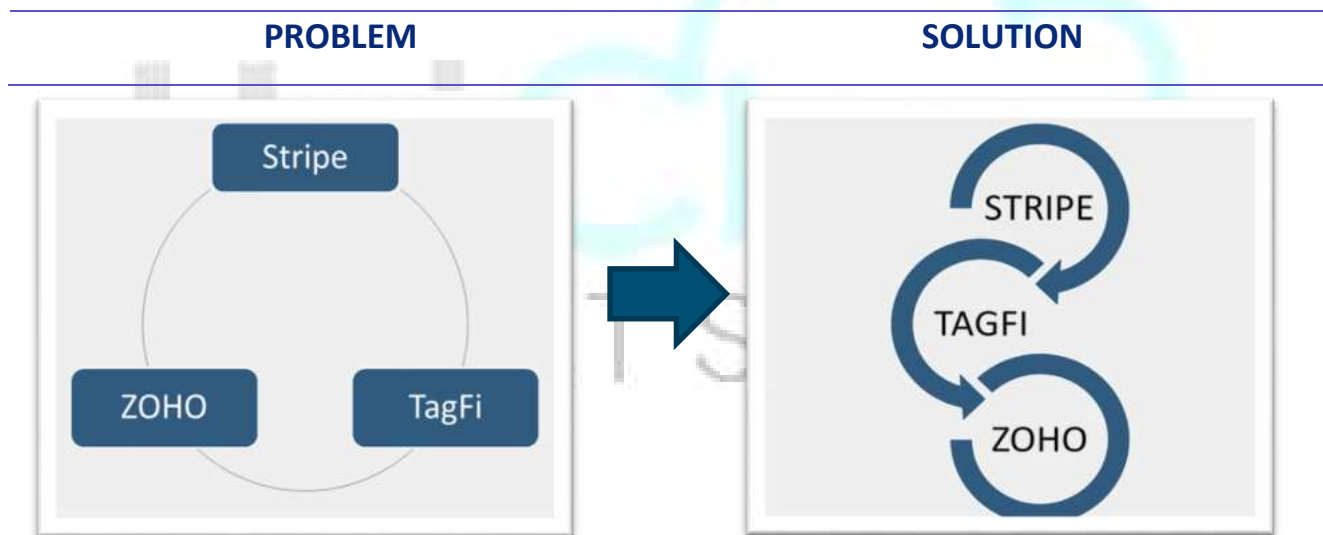
Problem while implementation:

The user data and subscription (payment) process involves stripe , TagFi and ZOHO and the data was also revolving around these parties.

Problem arises:

The data doesn't shows the accurate image as there is **mismatch** of information and records in ZOHO and TagFi.

Increases confusion due to complex process.



Solution Suggested:

To avoid complexity we have choose a systematic process with the use of **ZOHO SUBSCRIPTIONS & ZOHO BOOKS** (on testing)

- Now ZOHO will directly take user data and subscription details from TagFi.
- ZOHO will not take subscription details from stripe, all the records of stripe will be firstly stored in TagFi and then it will transfer to ZOHO.
- With this there will be no inconsistency of data and reports.

ABOUT UNICLOUD IT SERVICES



Was officially launched in the year 2018 on the 12th of September Unicloud IT Services is a cloud service provider company and ZOHO Advanced Partner. With over total experience of more than 7 years, Unicloud is 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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