

HIGH DIGITAL ONE95 PROJECT

INTRODUCTION

HIGH DIGITAL LIMITED

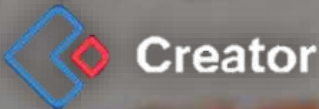
A digital solutions provider. They design, build, launch, and manage digital projects.

ONE95 is an agency based in Shoreditch, London, specialising in Demand Generation for Global B2B Brands. Their mission is to connect B2B companies with B2B buyers, in any country, in any language in the world.

So both the companies are operating hand in hand.

They require an automated platform for the bidding process, since they previously had to manually approve and refuse offers.

REQUIREMENTS



With the integration of **ZOHO CRM** and **ZOHO Creator**, ONE95 demands an automated bidding flow for their Portal.

The entire process revolves around the acceptance and rejection of bids, as well as supporting the team in reaching out to clients once the offer has been approved.

When a client's demands cannot be met in-house, the task must be automated and sent to a partner based on a set of criteria.

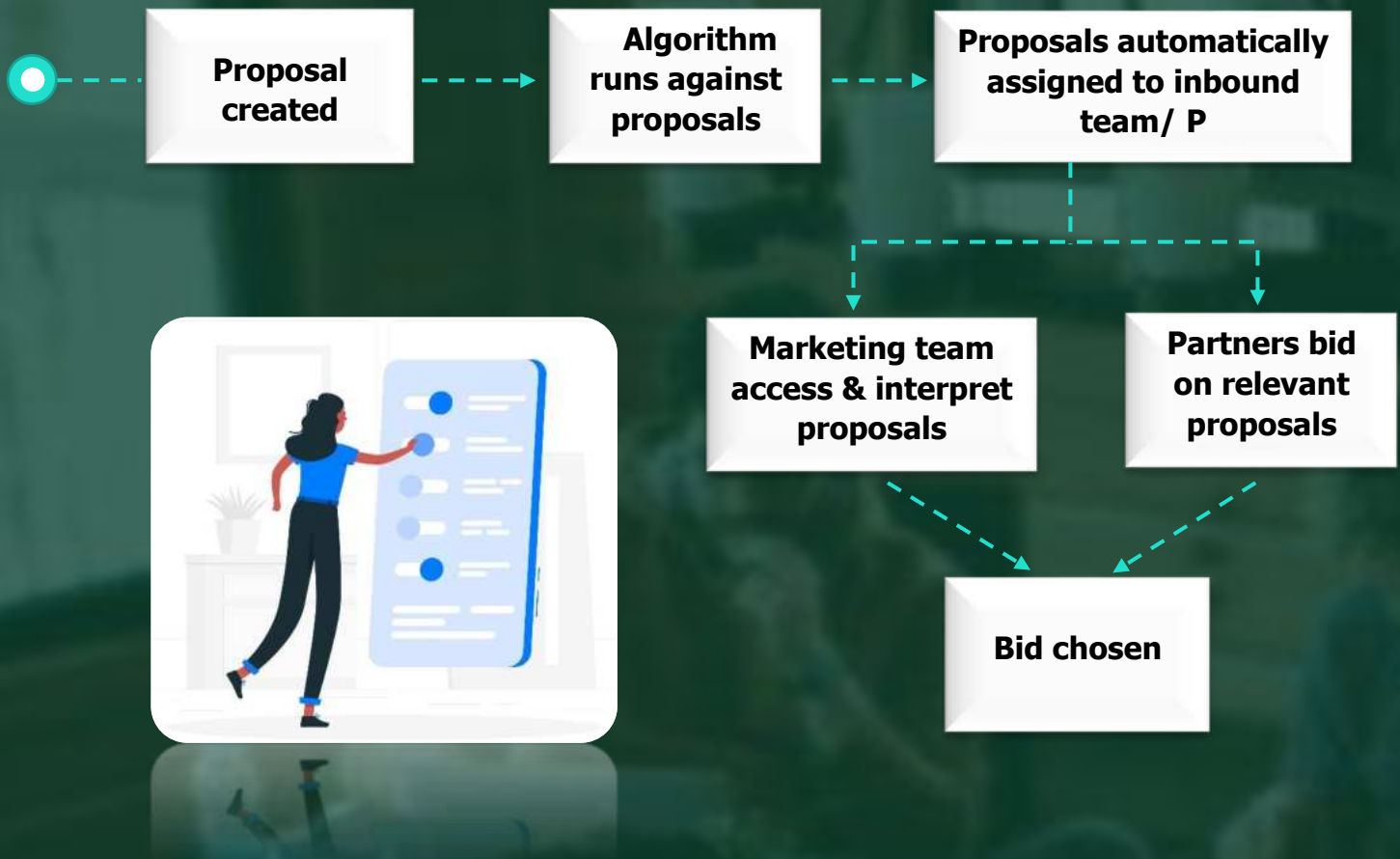
So Partner-bid application is integrated with ZOHO CRM & Creator

EARLIER BIDDING FLOW



Earlier management needs to filter the proposals, check the feasibility and transfer to partners manually. So now they need this process to be automated.

DESIRED AND IMPLEMENTED FLOW



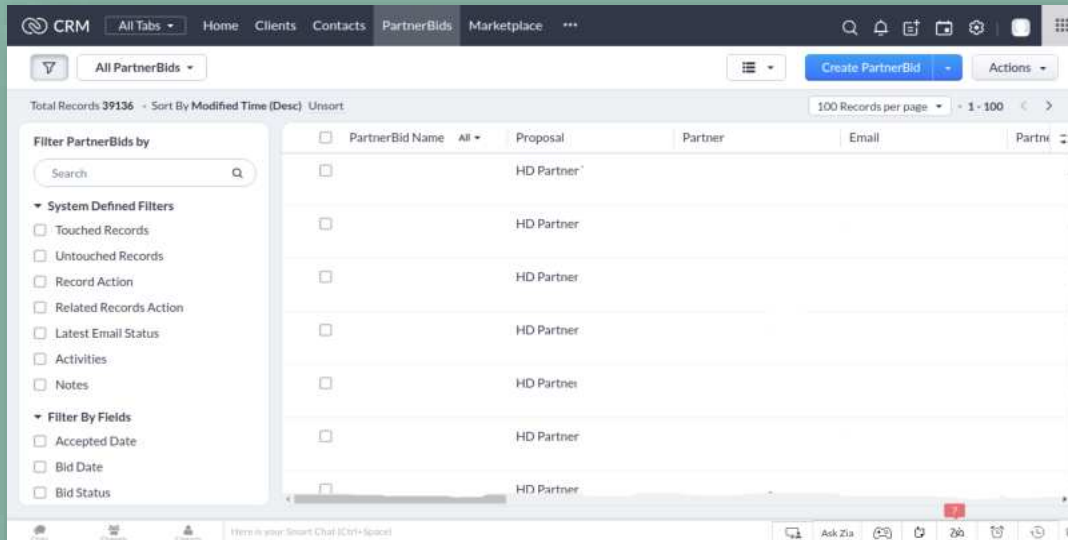
- After a proposal is generated, the smartech database contains conditions that determine which proposals are to be chosen.
- The selection criteria includes – Proposal campaign delivery, proposal country, industry, employee size, job functions, etc.
- If criteria got matched then it automatically assigned to inbound partner otherwise they select the outbound partners and partner bid get created.
- It is integrated with partner-bid application and the entire workflow mirrored there as well. (partners can accept or decline the bid)
- Proposals are also amended in **ZOHO CRM**, and any updates are instantly communicated with partners through email.
- Partner-Bid application is linked to **ZOHO CREATOR**, any changes made in **ZOHO CRM** will also be reflected in **ZOHO CREATOR**.

So this is the precise flow that the customer needs, which we have successfully executed.

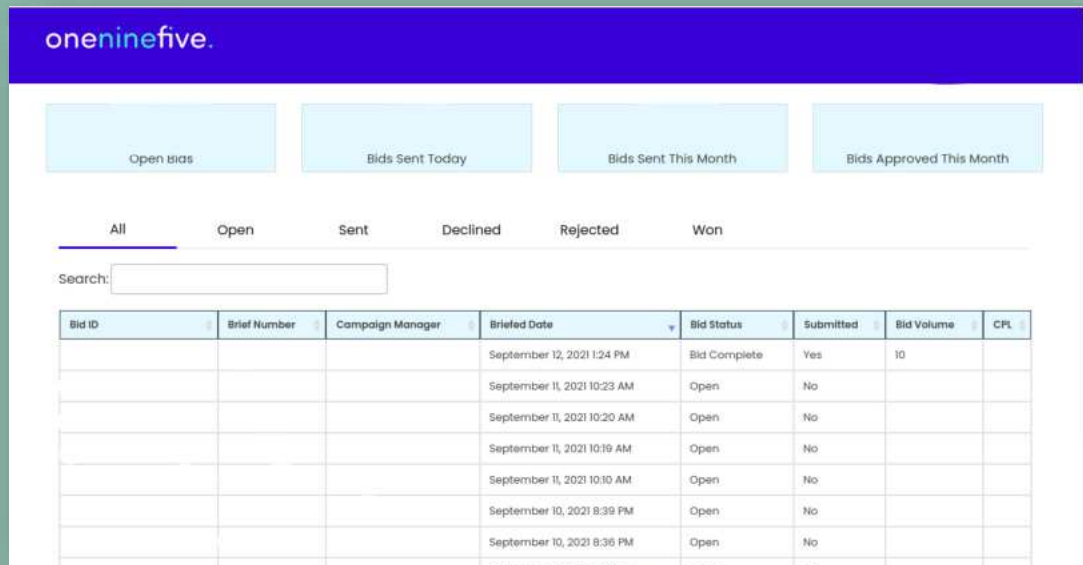
IMPLEMENTATION.....

(Customizations and Integrations)

ZOHO CRM



PARTNER BID PORTAL



ZOHO CREATOR

The screenshot shows the Zoho Creator interface for a 'Choose Partner' application. On the left is a dark sidebar menu with the following items: 'Choose Partner' (highlighted), 'Partner Data', 'Choose Partner', 'Choose Partner Rep...', 'SendEmail', 'Delete Partners', 'thankyoupage', and 'Failed Bids'. The main workspace area is titled 'Choose Partner' and contains a form with a dropdown menu labeled '-Select-', a green 'Submit' button, and a grey 'Reset' button. At the top right of the workspace, there are links for 'Edit this application' and 'Help'. The bottom left corner shows a user profile for 'oliver'.

PARTNER BID PORTAL

The screenshot displays the 'Partner Bid Portal' form. At the top, it shows 'Campaign: BN1010-' and 'Reference No:'. The form is split into two columns. The left column contains a list of criteria for selection, each with a corresponding input field: Region, Country, Industry (set to 'All'), Industry Exclusion, Sub-Industry, Sizes, Job Titles, Job Titles Exclusion, Job Keywords, Job Levels (set to 'Manager'), Job Function (set to 'IT,Marketing'), TAL (set to 'No'), Suppression List (set to 'No'), Leads per Organisation, Languages Accepted (set to 'English'), Questions (set to '0'), Question Detail, Technology Install, and Content Type. The right column contains instructions: 'Enter your bid cost per lead, volumes and any additional info you think would be useful in the boxes below to be considered for this brief.', 'We appreciate your support, and will endeavour to get back to you with feedback as quickly as possible!', and 'For any further information around this campaign, please email'. Below these instructions is a 'Decline to Bid' button and a section for bid submission with fields for 'Partner Name' (set to 'High Digital Test'), 'Currency' (set to 'GBP'), 'Bid Cost per Lead', 'Bid Lead Volumes', 'Set Live Days' (set to 'Days'), and 'Bid Channels' (a dropdown menu set to 'Select Bid Channels').

It has been executed effectively and the client is satisfied with all services delivered by UNICLOUD IT SERVICES.

The project's next phase is to set up **ZOHO ANALYTICS** for data tracking and timely reporting and, following that, there is a slew of other modifications and set-ups that will be deployed in the near future.

ABOUT UNICLOUD IT SERVICES



Was officially launched in the year 2018 on 12th of September.

Unicloud IT Services is a cloud service provider company and ZOHO Advanced Partner. With more than 7 years of professional expertise, 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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