



LOCKHART AUTOMOTIVE INC.

(AUTOMOBILE MANUFACTURERS INDUSTRY)

Subscription: Zoho One

Country: USA



LOCKHART
AUTOMOTIVE INC.

Company

Lockhart Automotive is a Toronto based commercial automotive broker. They help small to medium size businesses purchase, lease and finance vehicles for their fleets.

Sean Lockhart is the owner of Lockhart Automotive Inc. A Toronto-based brokerage, he offers a personalized fleet vehicle shopping experience for his clients, backed by over 30 years of industry experience and a proven system that helps them save time, lower costs, and eliminate the headaches of managing a fleet.



The challenge

The automobile manufacturing industry is highly competitive, with manufacturers continuously striving to capture market share and retain loyal customers. Mr. Sean, an established automobile manufacturer Owner, faced challenges in managing customer interactions, streamlining sales processes, and maximizing customer engagement. To address these issues, the company considered integrating WordPress with Zoho CRM to create a more efficient and cohesive system.

The format and structure of the data collected through the business credit application form may not directly align with the fields in Zoho CRM. Mapping the data accurately and integrating it seamlessly into the CRM system was quite complex and time-consuming.



Mr. Sean required the business credit card application form to be signed by the customer that too in a PDF format and update the data into the CRM. He needed to ensure the authenticity of the signature and record the signing process with a digital certificate, providing a legally binding and secure record.

He needed a user to fill out a form (business credit application form) and click on a "Submit" button, the form's data could be processed, and relevant actions could be taken, such as sending an email, saving the data to a database.

He needed to provide users and admin with a confirmation message after taking a significant action.

So Basically Overall, he wanted to have a simple and effective way to control user interactions, gather data, automate processes, and improve the overall functionality of a website or application Using "onclick" events for buttons.



The Requirement:

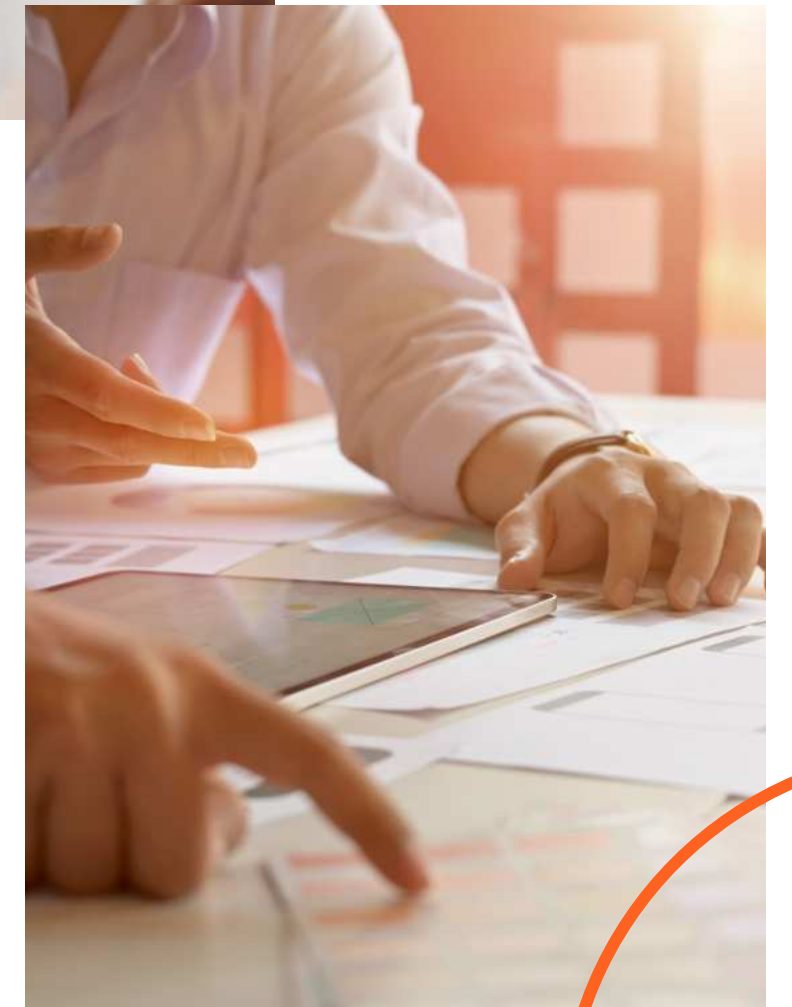
Admin Business & Consumer Credit Application Form along with the buttons:

- 1 Mr. Sean needed to set up both forms in Wordpress at first and add all the necessary fields to the forms to collect the required information from users and he was required to push the required data into CRM in the respective module.
- 2 After successfully submitting the form data to Zoho CRM, he was required to send an email notification to the admin along with the PDF and Allow Client to view.
- 3 He was required to upload Attachment in the “newDeals” module in CRM. In many business transactions or deals, supporting documentation is required. This could include documents such as invoices, purchase orders, contracts, legal agreements, or any other files relevant to the deal. By uploading these attachments directly into the newDeals module in Zoho CRM, all relevant information related to the deal is stored in one centralized location, making it easy to access and share with team members or clients.
- 4 Mr Sean required a convenient and efficient way for their team to initiate communication with their customers and also for admin if there would be updated information.
- 5 He was required to initiate the document signing process with the help of a button which will save time and effort compared to manually sending documents via email or using a separate e-signature tool.

The Solution: A successful Zoho WordPress integration along with Automation

We made the custom buttons in wordpress forms and Following are the events which performed on “onclick” action of these buttons:

- 1 To update data in the "newDeals" module in Zoho CRM, We Unicloud used the Zoho Flow for the integration between Wordpress and Zoho .We created the form in Wordpress and pushed the data into the CRM.
- 2 To send an email to the admin, We created the custom Script and when the "Submit Data" button is clicked and the data is successfully updated in Zoho CRM, we trigger an email to the admin notifying them about the new submission.
- 3 We added an attachment field to the WordPress form, allowing users to upload attachments. We used the Zoho CRM API to upload the attachment to the corresponding "newDeals" module record.





4 We implemented a front-end button on the relevant page that, when clicked, initiates the process.

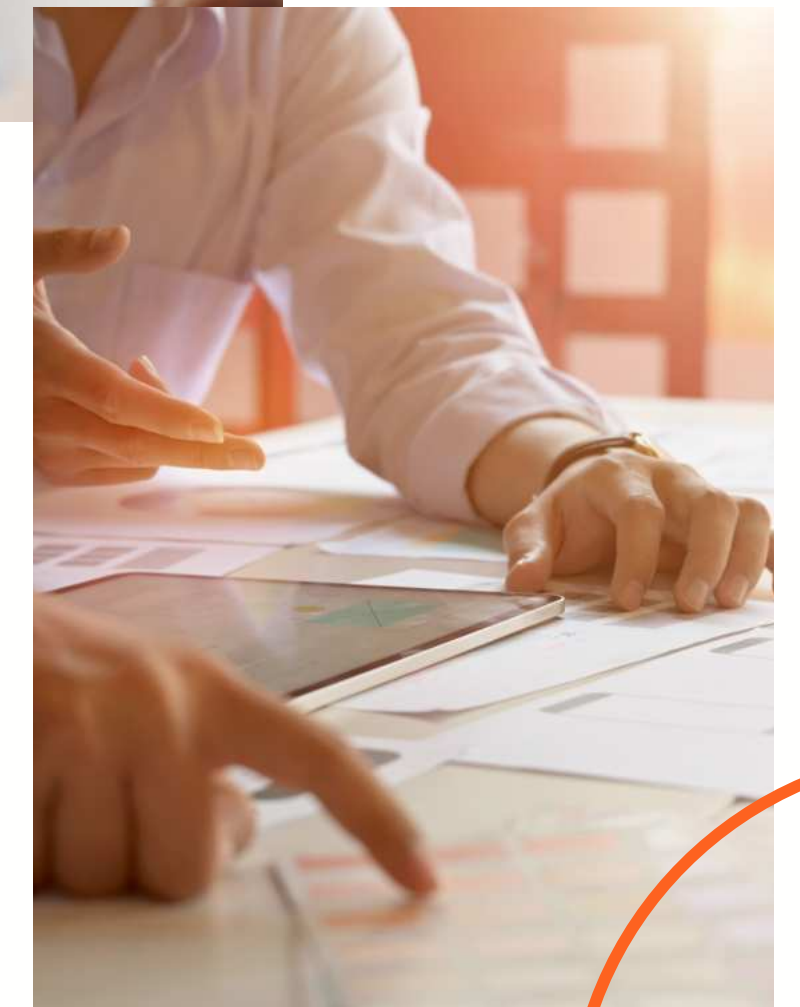
5 We Implemented functionality to capture the data submitted in the form and update the relevant modules (newDeals, account, contact) in Zoho CRM using Zoho CRM's API.

We sent an email to the admin notifying them that the data has been successfully updated in Zoho CRM.

6 We integrated Zoho Sign with Zoho CRM and set up the automation to achieve the desired workflow.

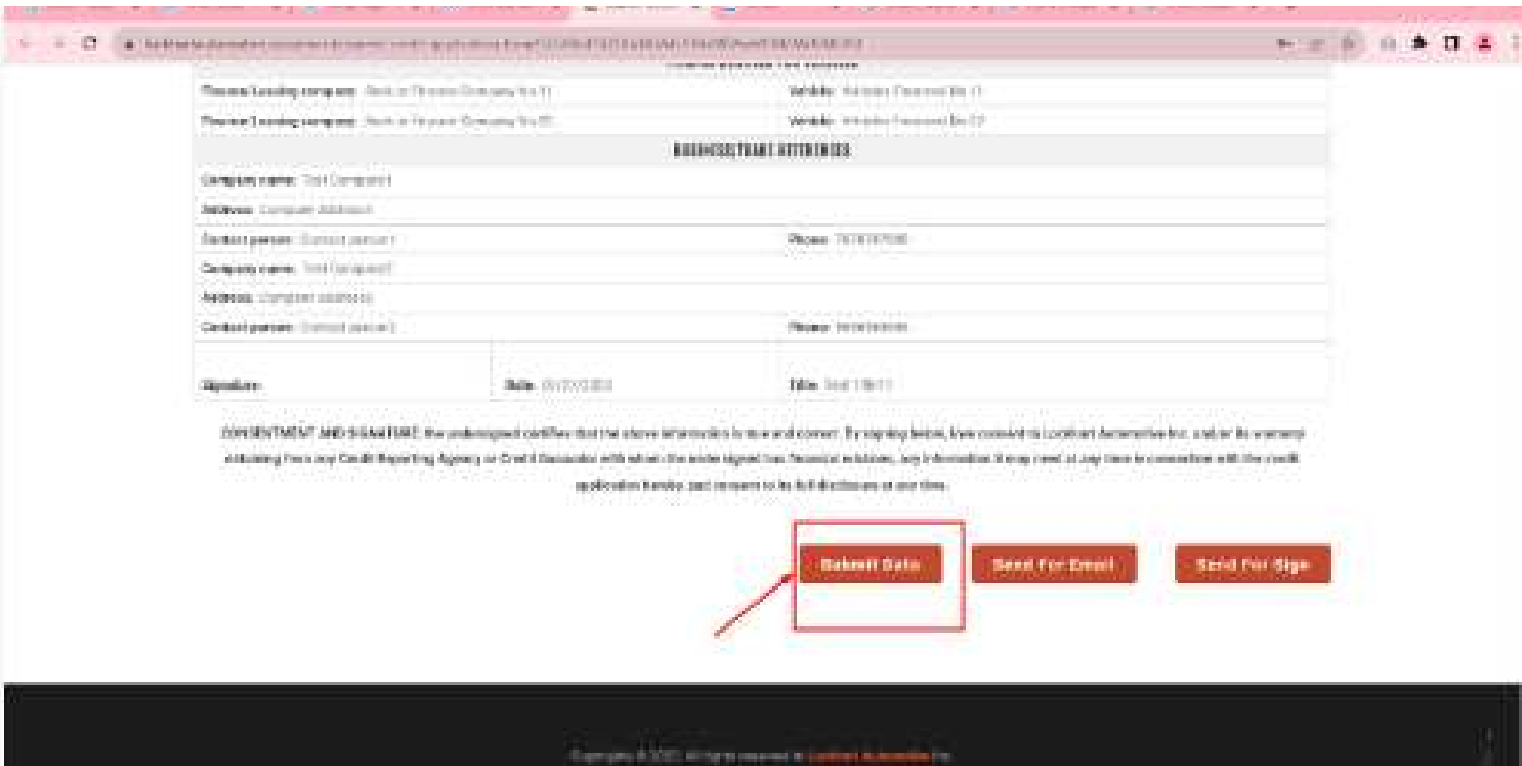
We are required to use the Zoho Sign API to initiate the signing process programmatically.

Once authenticated, we used the Zoho Sign API to initiate the signing process for the customer.

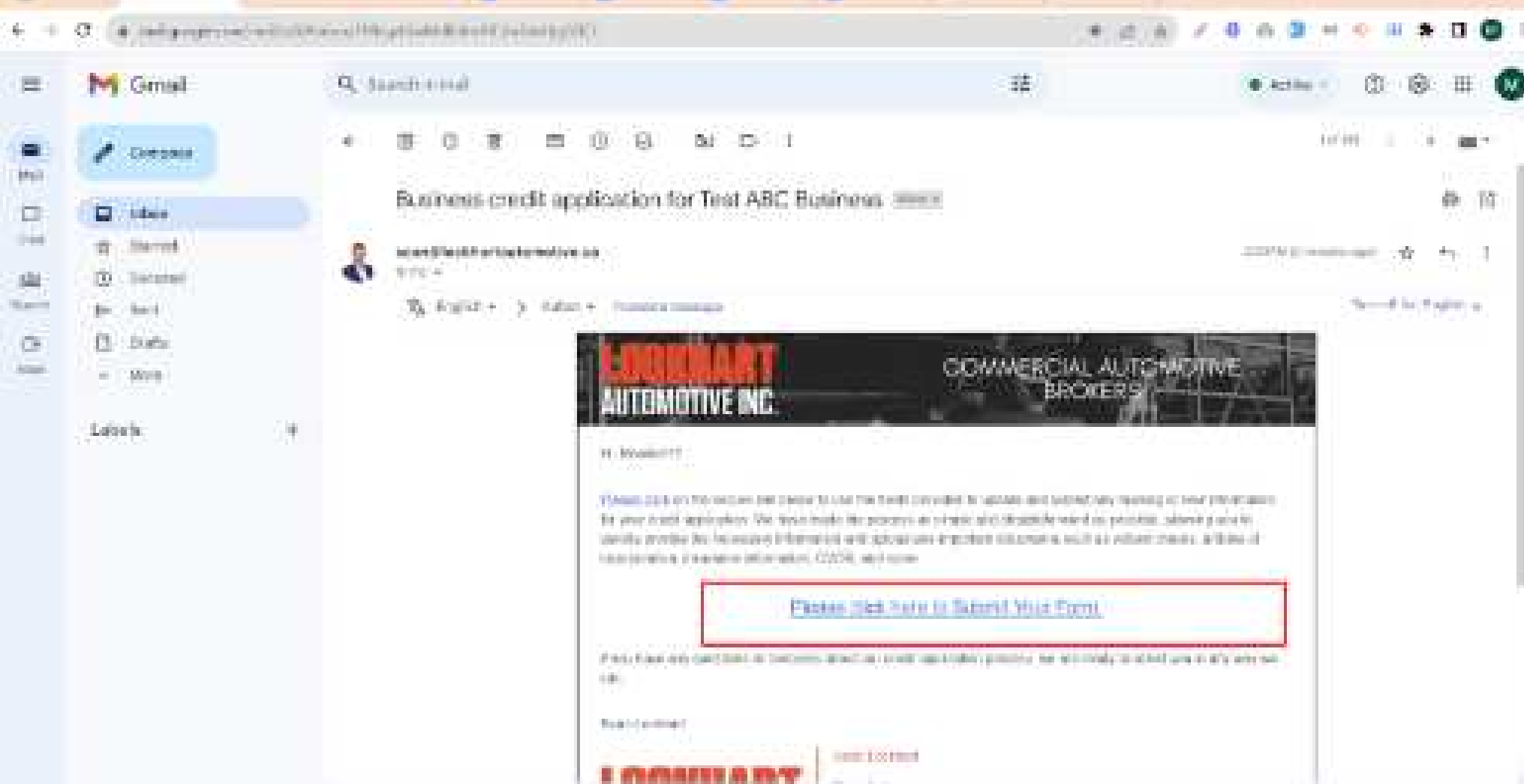


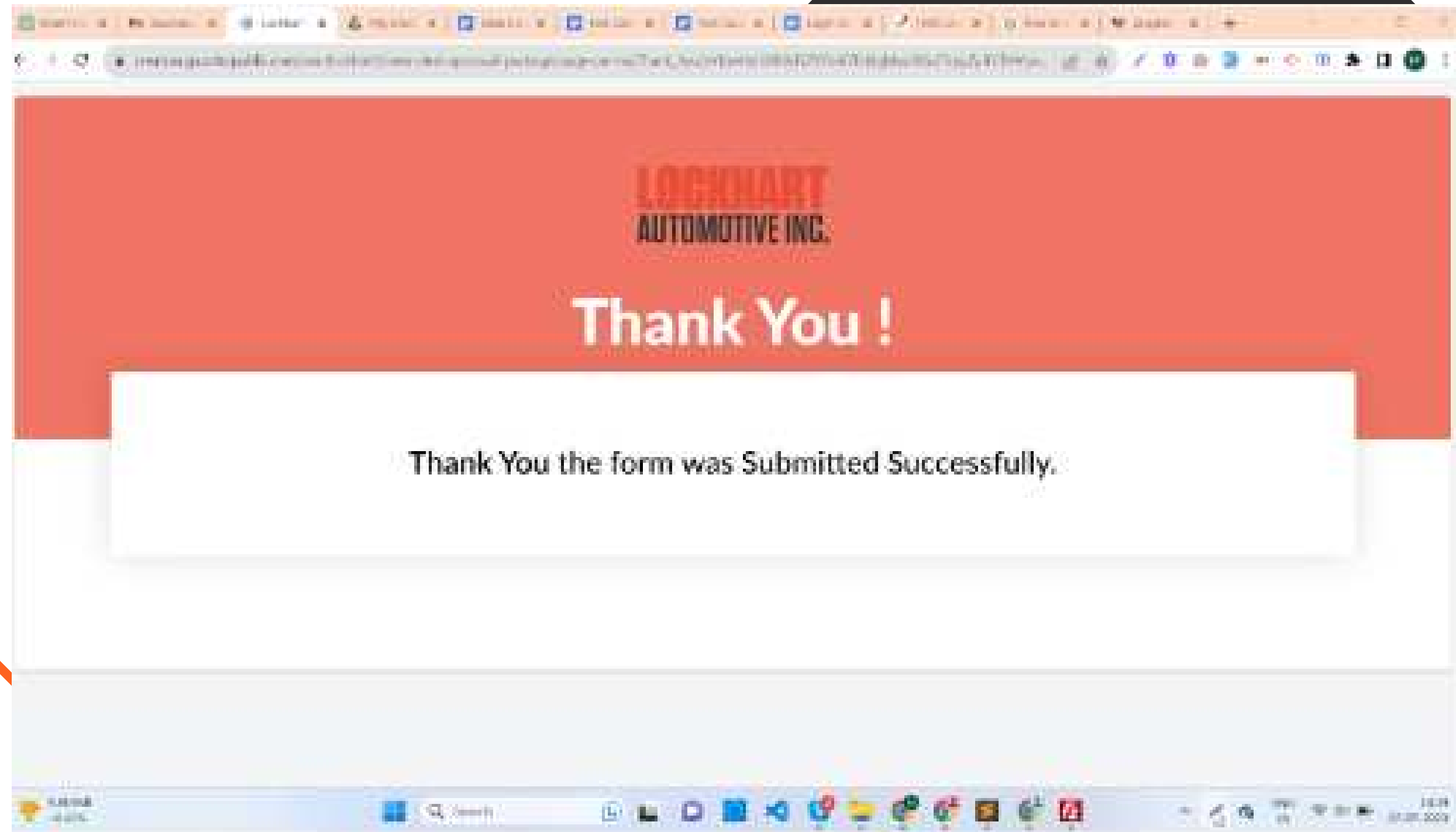
This typically involves sending a request to the Zoho Sign API with the recipient's email address, the document to be signed, and any other required details.

Zoho Sign will then send an email to the customer with a link to the document for signing.



An abstract geometric composition featuring a large orange triangle on the left, a dark gray triangle on the right, and a thin orange line connecting their peaks. The shapes are set against a white background.

A screenshot of a 'New Deal Approval Package' form. The form contains several input fields for user information and document uploads. A red-bordered box highlights the 'Articles of Incorporation' and 'Valid Company' fields, both of which have 'download.jpg' as the selected file. The form also includes fields for 'Owner's Last Name', 'Owner's First Name', 'Business Email', 'Business Phone', 'Driver's License', and 'DA QR Code'. At the bottom, there are 'Submit' and 'Reset' buttons.



Documents

You've successfully filled all fields. Click Finish to complete.

FINANCIAL SUBSIDIES FOR VEHICLES

Financing company: Bank in Finance Company No. 11 Vehicle: Vehicle 1

Financing company: Bank in Finance Company No. 22 Vehicle: Vehicle 2

BUSINESS/TRADE REFERENCES

Company name: Test Company1

Address: Company Address1

Contact person: Contact person1 Phone: Test Company1

Company name: Test Company2

Address: Company Address2

Contact person: Contact person2

Signature:  Date: 02/02/2023 Title: Test Title1

DECLARATION AND SIGNATURE: The undersigned certifies that the above information is true and correct, by signing below, and consents to the undersigned's liability to provide accurate data, any Credit Reference Agency with whom the undersigned has financial relations, any information it may need at any time in connection with the credit application hereby, and consent to its full disclosure at any time.

Financing Credit Application Test (M1) (Page 1)

Documents

MANAGED CREDIT APPLICATION

Company name: Test Company1

Address: Company Address1

Contact person: Contact person1

Signature:  Date: 02/02/2023 Title: Test Title1

The Result

In conclusion, the integration of Zoho with WordPress for the “Lockhart Automotive Inc” is a game-changer that will revolutionize the way the industry operates.

The integration has enabled the industry to efficiently manage leads and potential customers. Zoho's CRM capabilities will streamline lead capturing, nurturing, and conversion, enhanced the document signing process, allowing automobile manufacturers to stay on top of their sales pipeline.

It enabled the industry to facilitate document signing seamlessly and securely. Zoho Sign's advanced encryption and authentication features ensure the confidentiality and authenticity of the signed documents, providing peace of mind to both manufacturers and their customers.

This powerful combination allowed them to leverage the strengths of both platforms to enhance various aspects of their operations.

With Zoho's suite of business tools, including CRM, Sign and more, Lockhart Automotive Inc can efficiently manage customer relationships, streamline sales processes and by adopting this digital transformation, manufacturers can gain a competitive edge, improve internal processes, and meet the evolving demands of the modern business landscape.





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/>

