

boodleTM

Client Name: Heila Ungerer

Country: South Africa

Total Users: 29

Subscription: Zoho One



ABOUT

Boodle is a South Africa-based digital lending platform that specializes in providing quick, convenient, and responsible short-term credit. Focused on financial inclusion, Boodle leverages technology to offer fast online loan approvals, transparent repayment terms, and a user-friendly borrowing experience.

With a mission to make access to credit simple and stress-free, Boodle serves thousands of customers across South Africa, helping them meet urgent financial needs through a fully digital application and disbursement process.

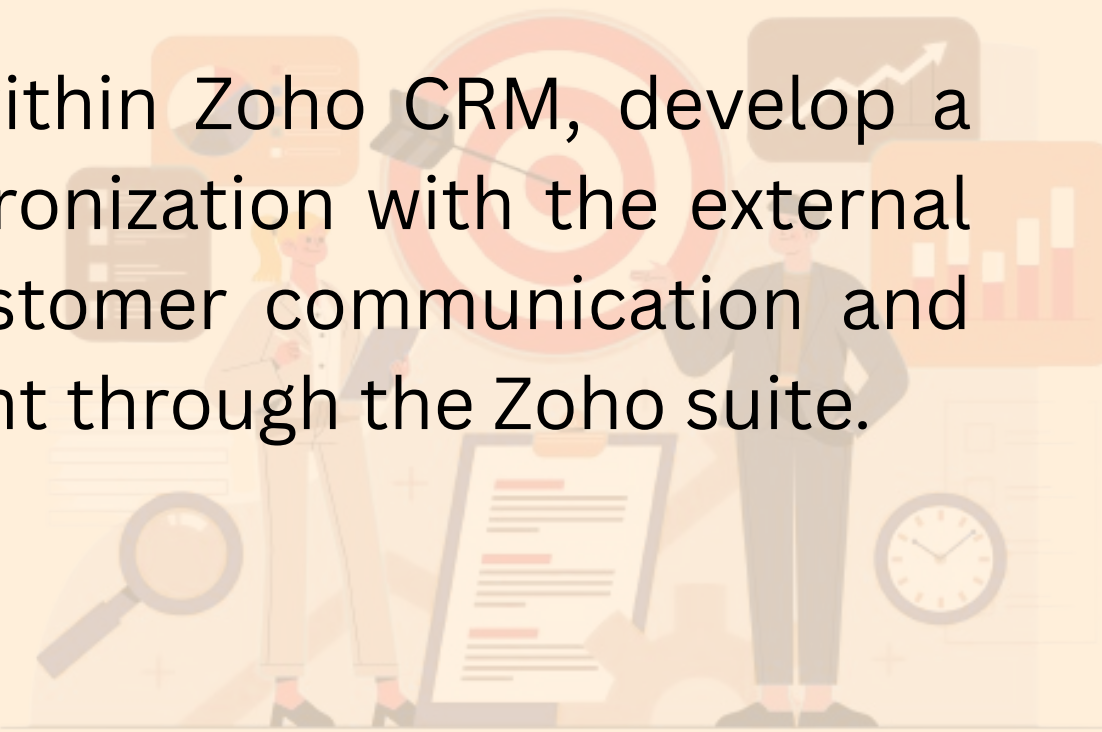


PROJECT OVERVIEW

UniCloud IT Services was tasked with building a comprehensive Zoho ecosystem for Booodle to bring their operations onto a single platform. Previously, Booodle's processes were spread across multiple disconnected systems, which led to manual work, inconsistent data, and limited visibility into operations. The project aimed to consolidate customer management, loan application workflows, communications, marketing, and analytics into one unified system.

PROJECT OBJECTIVES

The main objectives were to centralize and clean up customer data within Zoho CRM, develop a structured loan application module, and establish real-time data synchronization with the external loan management system. The project also focused on integrating customer communication and support tools, and enabling marketing, reporting, and website management through the Zoho suite.



CHALLENGES

Boodle faced several operational and technological challenges that limited its ability to scale effectively. Customer information was fragmented across multiple platforms, causing data duplication, errors, and delays during onboarding and servicing. Loan processing was largely manual, relying on spreadsheets and emails, which slowed approvals and created inconsistent experiences for customers. Staff lacked real-time access to loan statuses, repayment updates, or arrears data, leading to reactive decision-making and bottlenecks. Communication with customers was scattered across WhatsApp, phone calls, and emails, with no central record, making it difficult to track interactions or provide context-aware support. Additionally, Boodle had no unified reporting system, which meant business metrics were often outdated and decision-makers lacked actionable insights.



SOLUTIONS

UniCloud IT Services implemented a fully integrated Zoho ecosystem to address Booodle's challenges, connecting CRM, loan workflows, communications, support, marketing, analytics, and website management into a single platform. The solution centralized customer data, providing a 360° view of each client and automating loan application workflows. Embedded WhatsApp, email, and SMS channels enabled all customer communications to be tracked in one place. Zoho Desk provided omnichannel support with automated ticket routing, and Zoho Campaigns and Zoho Social streamlined marketing and social engagement. Custom dashboards in Zoho Analytics offered actionable insights into operations and marketing performance, while website optimization through Zoho PageSense improved user experience and conversion rates.



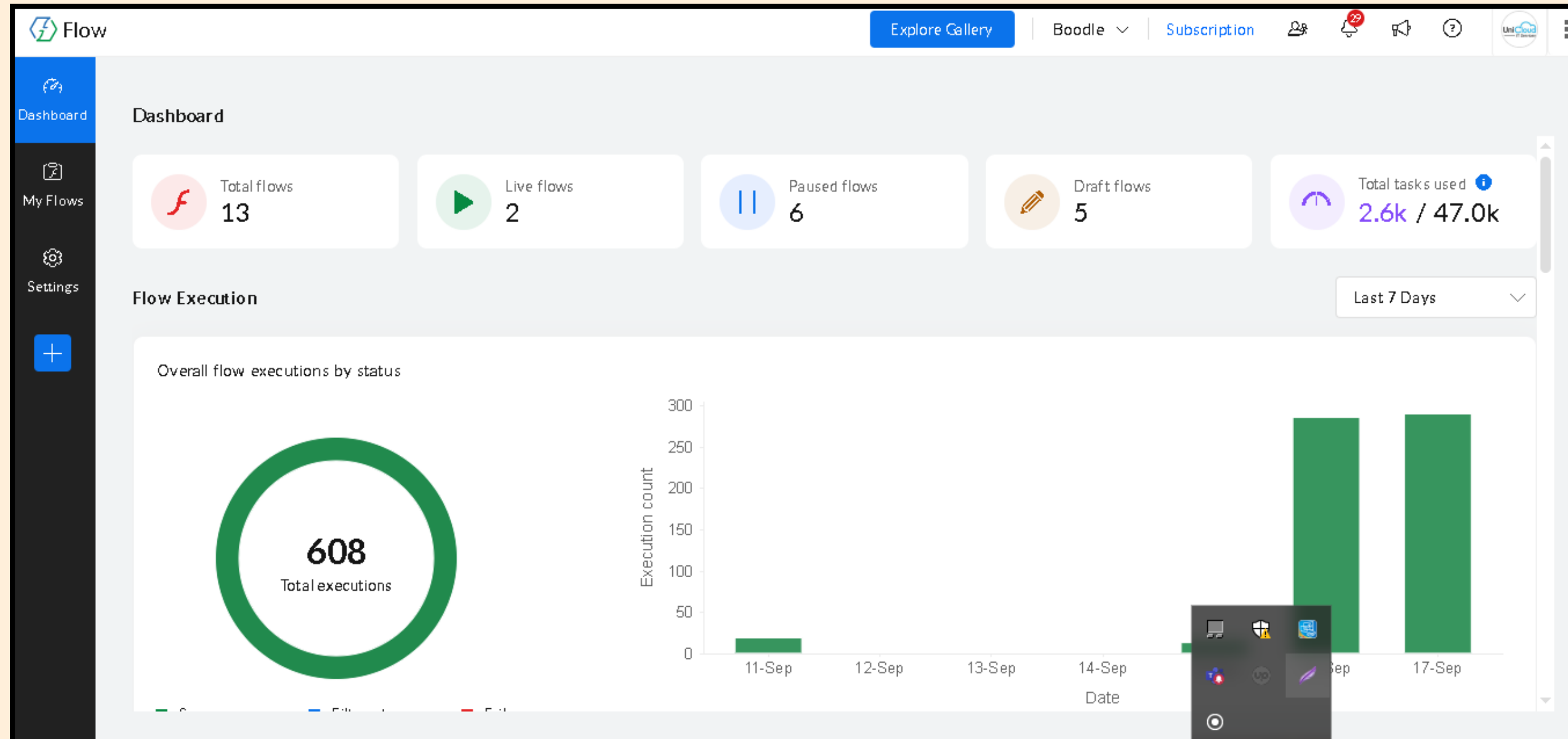
FEATURES AND FUNCTIONALITIES

Centralized Customer Management

- Migrated the entire customer database into Zoho CRM.
- Created a custom Customer Module with consolidated personal details, bank information, loan history, documents, and communication logs.
- Enabled a 360° view of each customer for instant access to critical information.

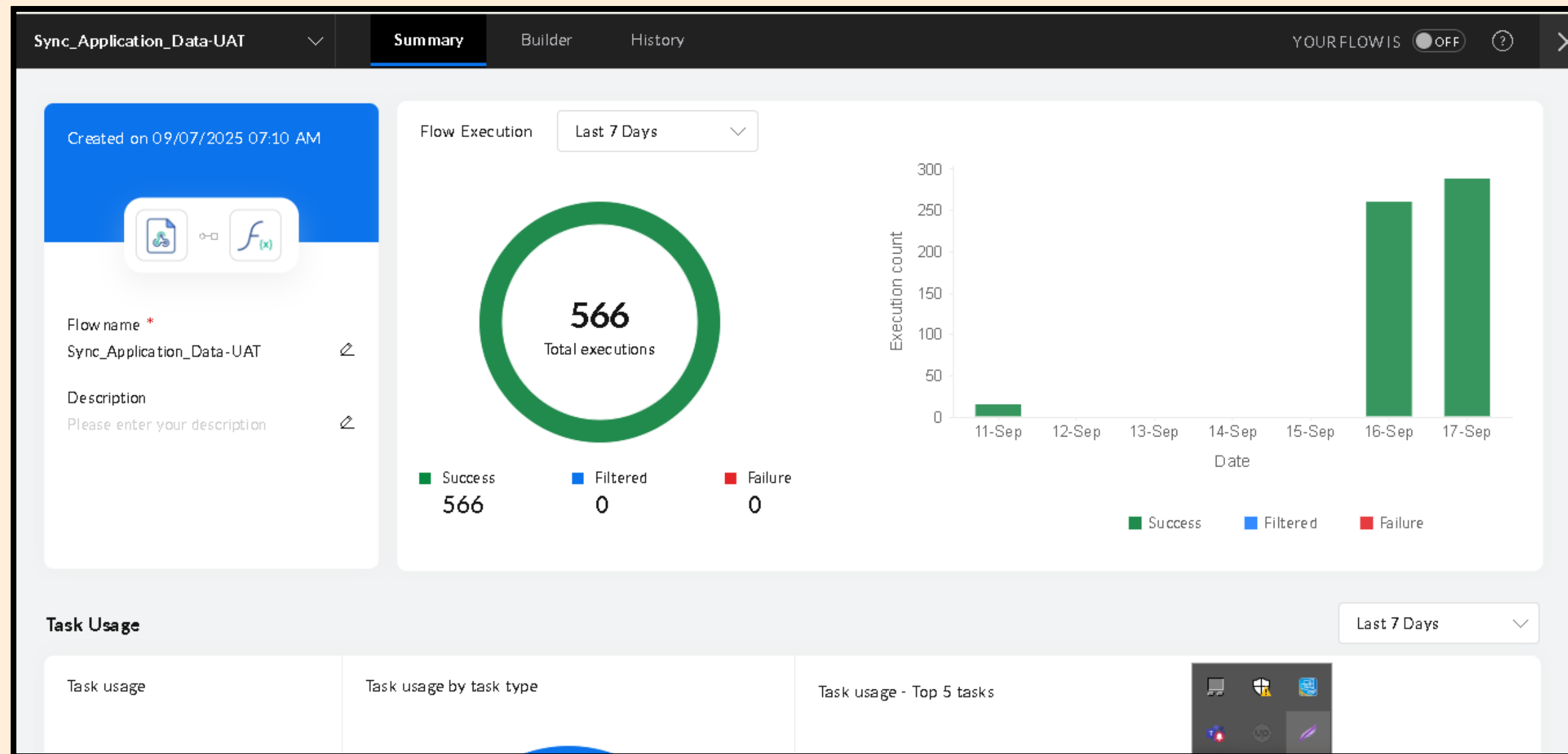
Automated Loan Application Workflow

- Built a dedicated Loan Application Module within Zoho CRM.
- Agents can start, track, and complete loan applications from a single interface, including affordability calculations, offers, consent links, document collection, and DebiCheck mandate acceptance.



Real-Time and Scheduled Data Sync

- Integrated Zoho CRM with Boodle's external loan management system using APIs and webhooks.
- Enabled real-time updates on loan statuses, retrieval of loan documents, and daily scheduled syncs for repayment and arrears data.



Unified Communication Channels

- Embedded WhatsApp, email, and SMS communication directly within Zoho CRM and Desk.
- Allowed all conversations to be initiated, tracked, and logged from a single platform.

Omnichannel Customer Support

- Implemented Zoho Desk integrated with IP Telecom (calls), Microsoft Exchange (email), CM.com (SMS), and Zoho SalesIQ (live chat).
- Automated ticket creation from website, social media, and chat, with routing to the appropriate departments.

Marketing & Social Engagement Tools

- Set up Zoho Campaigns for bulk email and SMS campaigns.
- Managed social channels using Zoho Social and integrated Hello Peter API for online reputation tracking.



Actionable Analytics

- Customized Zoho Analytics dashboards to track loan pipeline health, repayments, support SLAs, and marketing ROI.
- Provided leadership with real-time, data-driven insights for informed decision-making.

Website Optimization

- Used Zoho PageSense to implement user behavior tracking, funnel analysis, and A/B testing.
- Improved website performance and conversion rates through data-backed optimizations.



CONCLUSION

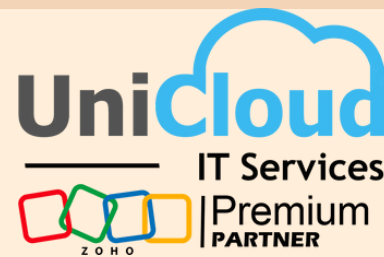
By partnering with UniCloud IT Services, Boodle successfully transformed from a set of disjointed, manual processes into a fully integrated, automated, and data-driven organization. Customer onboarding that once took hours can now be done in minutes. Loan applications are tracked end-to-end inside CRM. Every customer conversation is centrally logged. Leaders can access real-time performance dashboards at any moment. This new Zoho ecosystem has given Boodle the operational speed, accuracy, and insight it needs to scale confidently, while continuing to deliver fast and reliable lending experiences to its customers.

ABOUT US

Founded on September 12, 2018, Unicloud IT Services is a trusted cloud service provider specializing in ZOHO solutions. Our team of experienced developers brings over seven years of combined expertise, delivering tailored services that help businesses across industries achieve their goals.

To date, we have successfully completed 1,000+ projects for over 5,000 clients, maintaining a 95% project success rate and strong client retention. Our team holds multiple ZOHO certifications, reflecting our commitment to quality, security, and reliable support.

Unicloud continues to expand its services, partnering with organizations of all sizes to implement effective, technology-driven solutions.



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