



Client Name: Sahil Mahajan

Country: India

Total Users: 15

Subscription: Zoho One



ABOUT

Ravenbhel Healthcare Pvt. Ltd., established in 2003, is a professionally managed pharmaceutical company specializing in the manufacturing of drug formulations. With WHO-GMP certified facilities, the company produces a wide range of products including tablets, oral liquids, capsules, and sachets. Their expertise in contract development and differentiated formulations has earned them the trust of national and multinational pharmaceutical companies across geographies. Committed to regulatory compliance and innovation, Ravenbhel continues to deliver world-class healthcare solutions.



PROJECT OVERVIEW

Unicloud IT Services was tasked with implementing Zoho One for Ravenbhel Healthcare to unify operations across sales, customer engagement, compliance, and finance. The objective was to replace fragmented processes with an integrated digital ecosystem designed for the pharmaceutical industry's unique needs.

PROJECT OBJECTIVE

Unicloud IT Services was engaged to implement Zoho One for Ravenbhel Healthcare with the goal of creating a unified system that centralizes lead management, customer engagement, and compliance processes. The project focused on enabling WhatsApp integration for real-time communication, improving visibility into lost leads, and strengthening inventory control with batch and expiry tracking. It also aimed to integrate CRM with ERP for seamless order and stock synchronization, enhance customer service through Zoho Desk, and streamline financial operations using Zoho Books and Zoho Expense. Additionally, custom Zoho Creator applications were developed to support pharma-specific workflows, ensuring the solution met the company's regulatory and operational needs.

CHALLENGES

Ravenbhel was facing several operational challenges that were slowing down their business. Their systems were fragmented across CRM, ERP, and manual spreadsheets, making it difficult to have a unified view of operations. Tracking critical information such as batch numbers, expiry dates, and regulatory data was a constant struggle. The team also had limited visibility into lost leads and opportunities for re-engagement, which affected their sales effectiveness.

Sales orders and purchase orders were not synchronized efficiently, creating delays and errors. Financial processes were equally challenging, with expense management and reporting lacking automation. On top of this, Ravenbhel needed workflows tailored specifically for the pharma industry, including doctor engagement, compliance checks, and standard operating procedures (SOPs). These gaps were making it difficult for the company to scale effectively and operate smoothly



SOLUTIONS

UniCloud IT Services implemented a complete Zoho ecosystem to streamline the client's operations. Zoho CRM was customized with a lead module integrated with WhatsApp and a Lost Leads module to track and re-engage dropped opportunities. Zoho Desk provided multi-channel ticketing with SLA workflows for faster support and a unified customer view. Inventory and ERP were integrated for real-time stock visibility and automated order syncing. Zoho Creator built pharma-specific apps for order approvals, compliance, and inventory management, supported by management dashboards. Zoho Books handled GST and pharma invoicing with automated entries and over 20 custom reports, while Zoho Expense simplified expense submissions and reimbursements. Customer data forms were linked directly to CRM and ERP for accurate and compliant data capture.

FEATURES AND FUNCTIONALITIES

Zoho CRM – Customized lead module with WhatsApp integration for instant client communication and a Lost Leads module to track, analyze, and re-engage dropped opportunities.

The screenshot displays the Zoho CRM interface. The top navigation bar includes 'CRM', 'All Tabs', and various modules like Home, Query, Business Development, and Costing. A 'Try CRM for Everyone' button is also present. Below the navigation bar, the user is welcomed as 'Vikram Bhardwaj'. The dashboard shows four key metrics: Total Leads (79), Converted Leads (48), Total Deals (28), and Deal Closed Won (1). Below these metrics, there are filters for Date, Product Category, and Email. The bottom section shows a lead record for 'Eric Jones'. The lead record has tabs for Overview and Timeline. The Overview tab is active, showing the current state as '-None-' and a button to 'Gather details'. A red box highlights the 'Send WhatsApp' button in the lead record's action bar, with a red arrow pointing to it and the text 'Send WhatsApp Message' below it. The 'Send WhatsApp' button is part of a group of buttons including 'Send Email', 'Call now', 'Convert', 'Edit', and a dropdown menu. The 'Send WhatsApp' button is highlighted with a red box, and a red arrow points to it from the text 'Send WhatsApp Message' below. The 'Send WhatsApp' button is also part of a group of buttons including 'Send Email', 'Call now', 'Convert', 'Edit', and a dropdown menu. The 'Send WhatsApp' button is highlighted with a red box, and a red arrow points to it from the text 'Send WhatsApp Message' below.

CRM All Tabs Home Query Business Development Costing ... Try CRM for Everyone

RAVENBHEL Your Dependable Formulation Partner Welcome Vikram Bhardwaj Users Dashboard

Dashboard

Filters Date: - Select - Product Category: All Email: - Select -

Total Leads 79

Converted Leads 48

Total Deals 28

Deal Closed Won 1

Home Leads Contacts Accounts Orders Activities Reports Analytics Products Quotes ... All Tabs

Eric Jones Add Tags Send Email Call now Convert Edit Send WhatsApp

Related List Notes Attachments Products Open Activities 1

Overview Timeline Last Update : 2 day(s) ago

Current State -None- Transitions Gather details View configured actions

Send WhatsApp Message

Inventory & ERP Integration – Enabled real-time stock visibility with batch and expiry tracking, while automating sales and purchase order sync between CRM and ERP.

CRM

All Tabs

Home

Query

Business Development

Costing

...

Try CRM for Everyone

RAVENBHEL

Your Dependable Formulation Partner

Welcome Vikram Bhardwaj

Users Dashboard

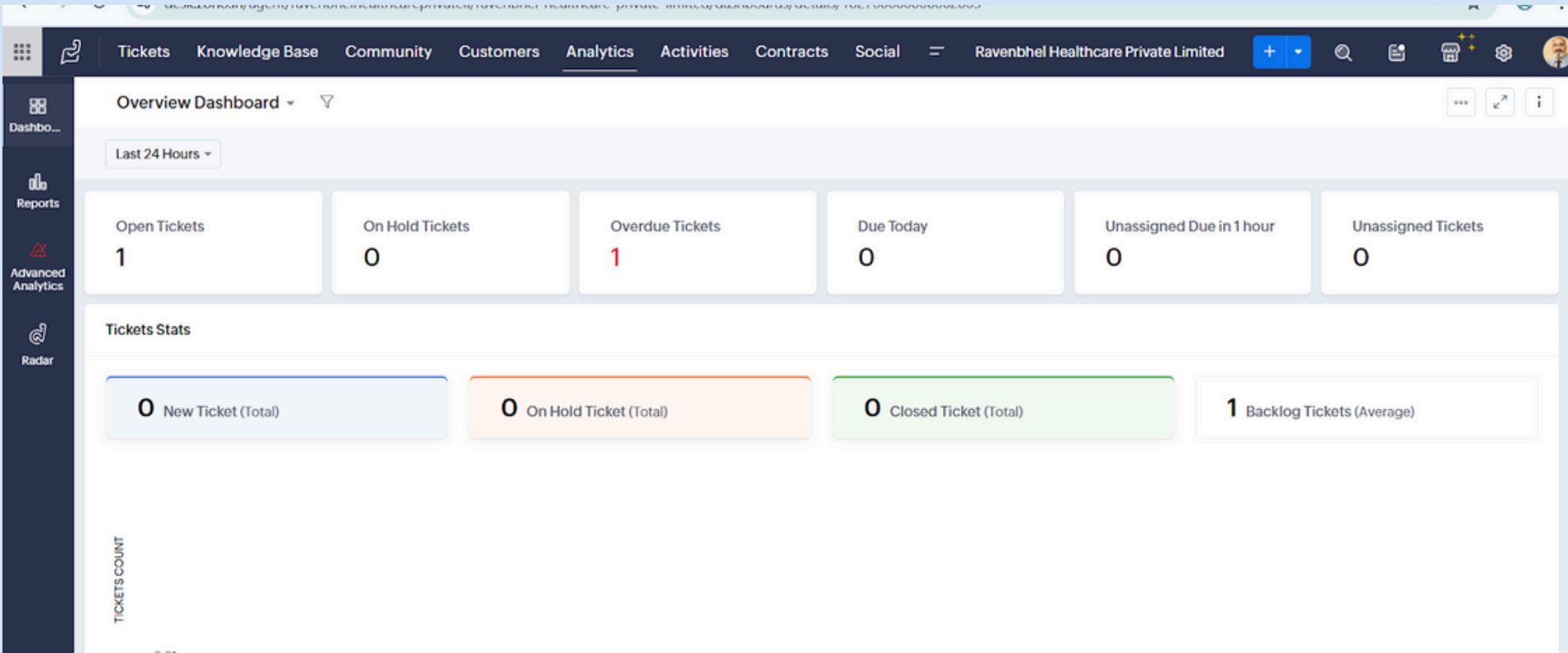
Deals Summary

	Deal Name	Deal Owner Name	Stage	Expected Amount	Deal Amount	Won Amount	Avg Sales Cycle in Days
Grand Summary:				₹ 76,323.40	₹ 102,434	\$1,200.00	1.00
1	Alwin	Vikram Bhardwaj	Qualification				
2	Dummytest One	Vikram Bhardwaj	Qualification				
3	Fake Test2	Vikram Bhardwaj	Qualification				
4	GOOGLE	Vikram Bhardwaj	Proposal/Price Quote	₹ 75,000.00	₹ 100,000		
5	Mukesh Sharma	Vikram Bhardwaj	Qualification				
6	TEsting	Anuj Johri	Qualification				
7	Tanpreet Singh	Vikram Bhardwaj	Qualification				
8	Testing	Anuj Johri	Qualification	₹ 10.00	₹ 100		
9		Vikram Bhardwaj	Qualification				
10	Testing One	Vikram Bhardwaj	Qualification				

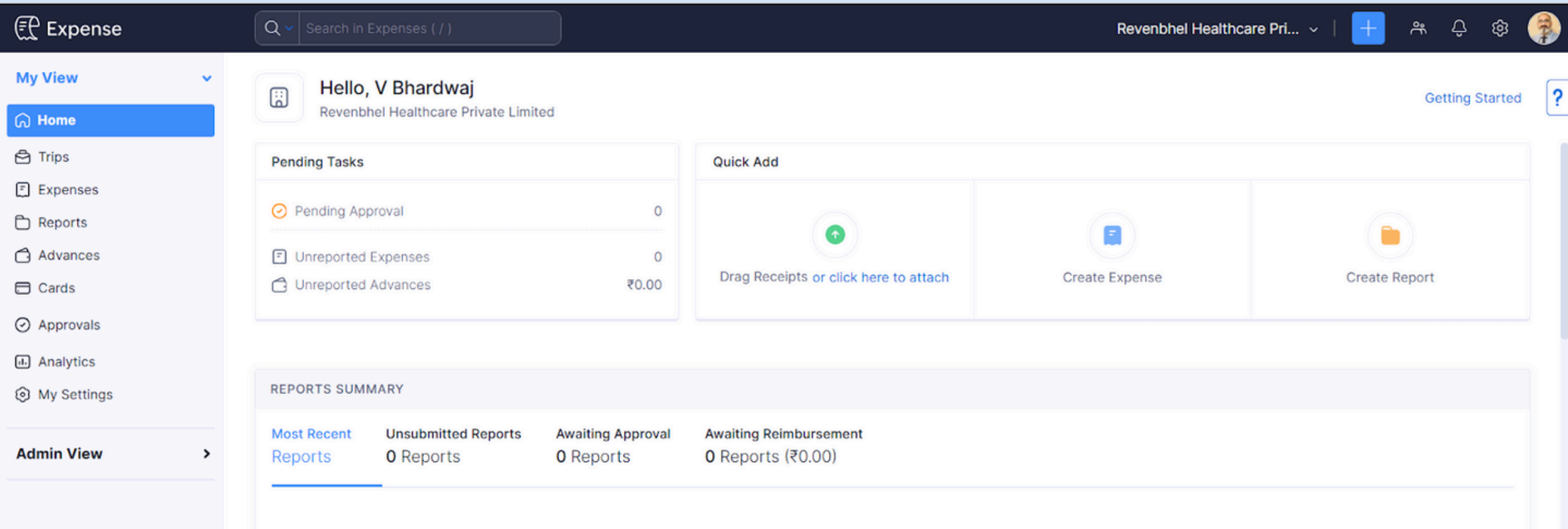
Zoho Books – Configured for GST and pharma-specific invoicing with automated entries, approval hierarchies, and 20+ tailored reports for finance teams.

Customer Data Forms – Designed web forms directly linked to CRM and ERP for accurate, validated, and compliant data capture.

Zoho Desk – Implemented for multi-channel ticketing with SLA workflows, giving customer support teams faster resolution and a unified customer view.



Zoho Expense – Deployed for field staff and internal teams to simplify expense submissions, approvals, and reimbursements, all integrated with Zoho Books.



Zoho Creator – Built pharma-specific apps for order approvals, compliance documentation, and inventory requests, supported by management dashboards for real-time oversight.

CRM data

BD Query Form

BD Query Form

Name *	<input type="text"/>	<input type="text"/>
	First Name	Last Name
Email *	<input type="email"/>	
Phone	<input type="text" value="+91 81234 56789"/>	
Lead Source *	<input type="text" value="-Select-"/>	
Lead Status	<input type="text" value="-Select-"/>	

Product Details

Creator

DEVELOP

Solutions

Microservices

DEPLOY

Environments

Mobile

Portal

MANAGE

Users

Welcome, Vikram Bhardwaj

PM

Process Management

Created on May 26, 2025

Application More Edit

CD

CRM data

Created on Apr 10, 2025

Application More

Compositions	Other Product	Product category	Other Category	Dosage Form	Monocarton
<input type="text" value="-Select-"/>	<input type="text"/>	<input type="text" value="-Select-"/>	<input type="text"/>	<input type="text" value="-Select-"/>	<input type="text" value="-Select-"/>

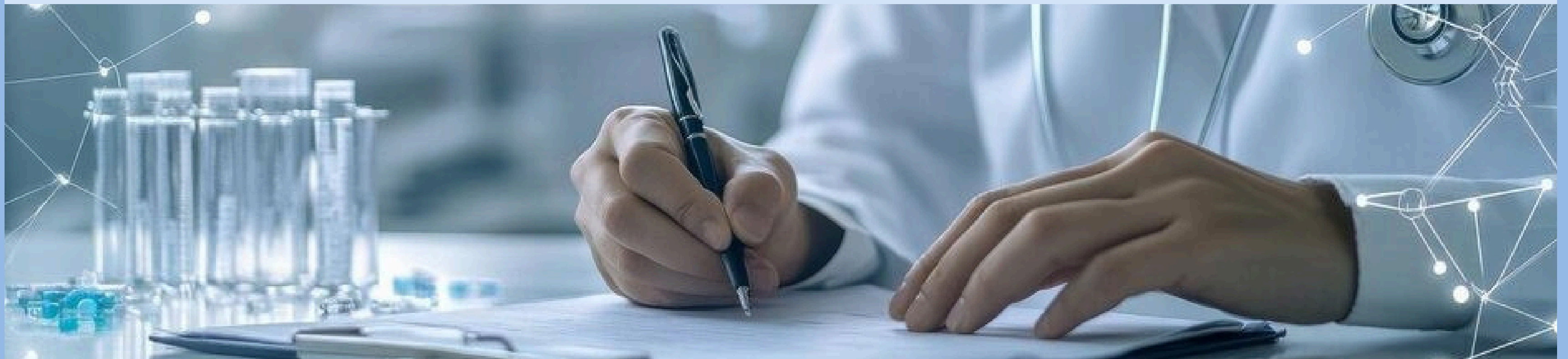
+ Add New

Submit

Reset

CONCLUSION

Through this implementation, Unicloud IT Services successfully transformed Ravenbhel Healthcare's operations into a fully connected digital ecosystem powered by Zoho One. The company now manages leads, customer interactions, inventory, compliance, finance, and support within a single integrated platform. With real-time data flow between CRM, ERP, and accounting, Ravenbhel gained greater accuracy and visibility across departments, while automation reduced manual effort and errors. Overall, the project enabled Ravenbhel Healthcare to operate more efficiently, improve decision-making, and strengthen its ability to scale while maintaining industry standards.

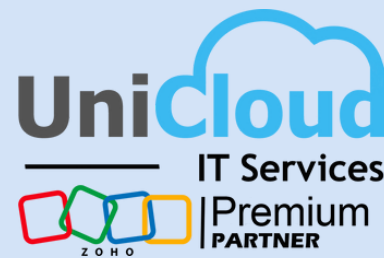


ABOUT US

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.



<https://www.uniclouditservices.com>