

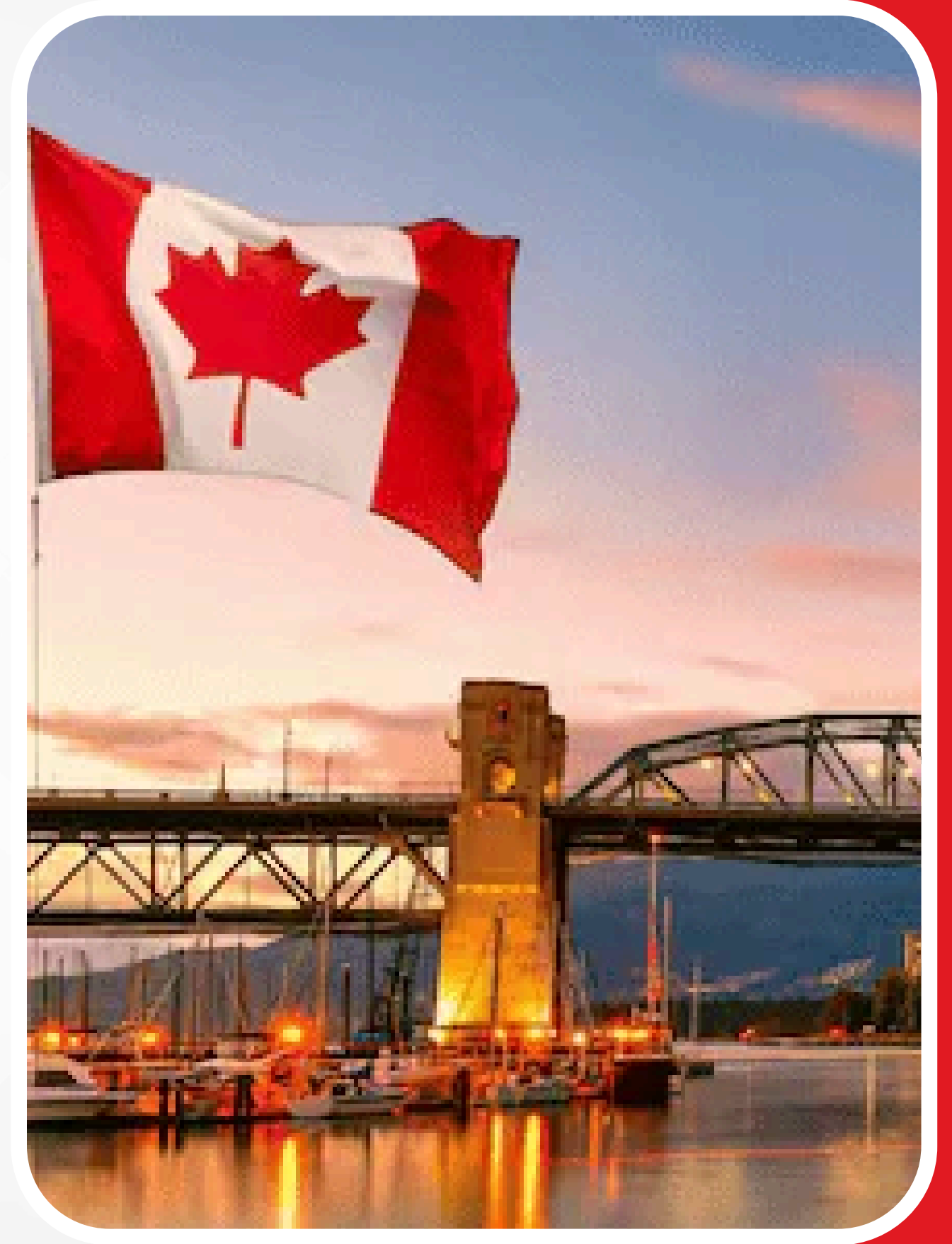


Client Name: Sukhwinder Panesar

Country: canada

Total Users: 10

Subscription: zoho one



ABOUT

Pan West Immigration Services is a Canadian immigration consulting firm, operating in India under Pan Global Immigration, offering end-to-end services across Student Visa, Permanent Residence, Express Entry/CEC, Work Permit, Visitor Visa, Spousal and Family Sponsorship, Super Visa, LMIA, PNP, and Canadian Citizenship applications.

The organization was running its customer journey across disconnected tools – a legacy case management system (Officio.io), manual booking processes, separate payment collection, and unstructured document handling. UniCloud IT Services was engaged to design and implement a unified Zoho One ecosystem that automates the complete customer lifecycle: lead capture, consultation booking and payment, client onboarding, document collection, digital agreement signing, multi-channel communication, and management reporting – while migrating legacy CRM data and the organization's email infrastructure with zero critical data loss.



CLIENT OVERVIEW

Business Profile

- Pan West Immigration Services specializes in Canadian immigration consulting, supporting individuals and families across the full spectrum of visa and residency pathways.
- Student Visa
- Permanent Residence (PR)
- Express Entry (EE) / Canadian Experience Class (CEC)
- Work Permit
- Visitor Visa
- Spousal & Family Sponsorship
- Super Visa
- Labour Market Impact Assessment (LMIA)
- Provincial Nominee Program (PNP)
- Canadian Citizenship Applications

Technology Stack Deployed

Category	Applications / Tools
Zoho Applications	Zoho CRM, Zoho Creator, Zoho WorkDrive, Zoho Sign, Zoho Desk, Zoho Bookings, Zoho Flow, Zoho Mail
Third-Party Integrations	Microsoft 365, Respond.io (WhatsApp), Stripe Payment Gateway
Legacy System (migrated from)	Officio.io Immigration Management Software

CHALLENGES

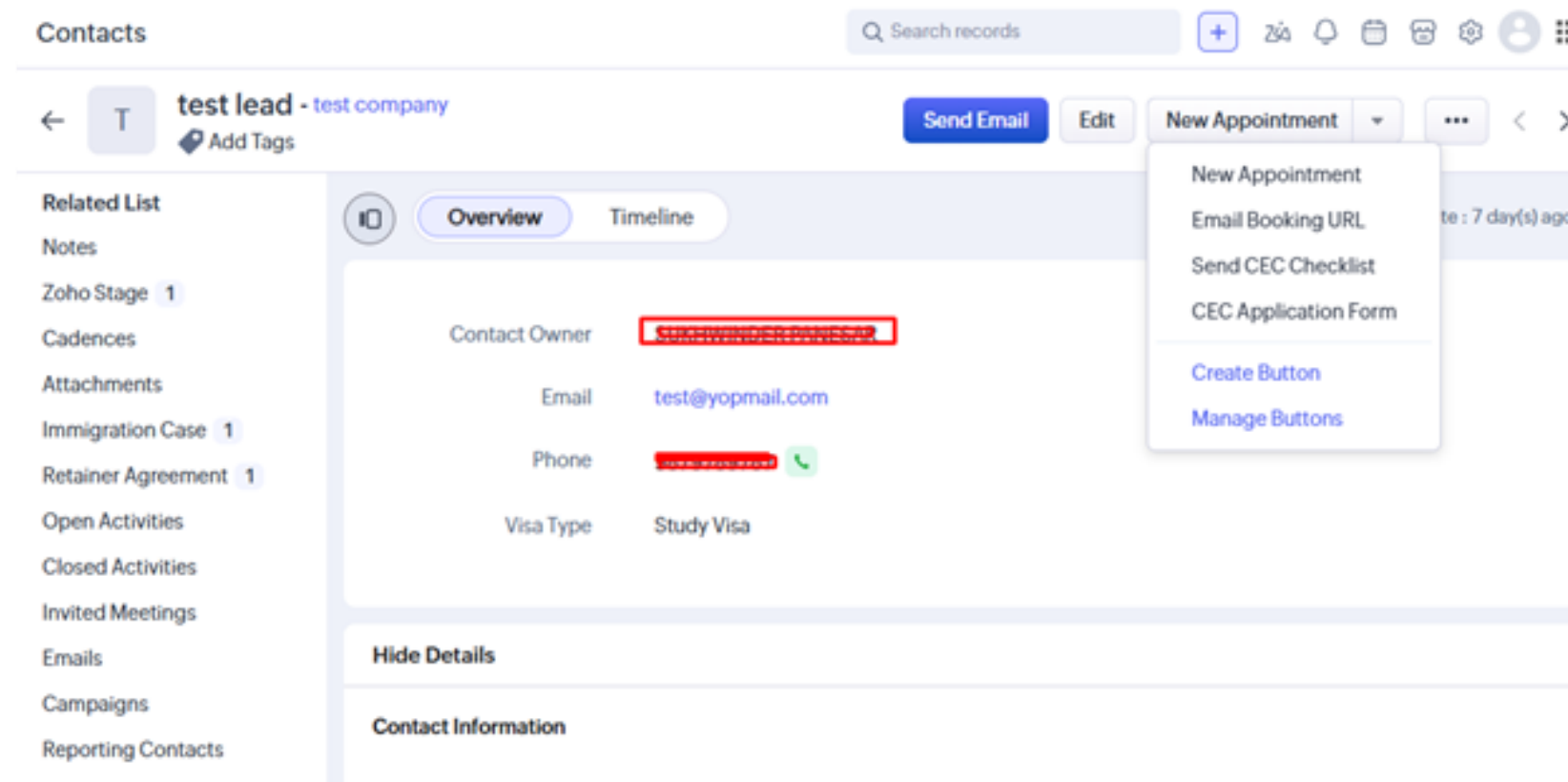
Prior to the engagement, Pan West's customer journey – from first inquiry through onboarding and case tracking – was fragmented across manual processes and disconnected systems, creating operational bottlenecks and data-integrity risk.

- Manual lead assignment and follow-up with no centralized nurturing workflow
- Booking and CRM operating as separate, unsynchronized systems
- Manual payment collection with no automated verification
- Manual document management with no centralized customer repository
- No standardized client onboarding process
- Manual, paper-based agreement signing
- No automated WhatsApp or email communication workflows
- Complex, unstructured customer data collection
- Limited reporting and management visibility
- Legacy data migration from Officio.io involving hundreds of custom fields and complex field/module dependencies
- Organization-wide email migration from Microsoft 365 to Zoho Mail requiring zero data loss

SOLUTION ARCHITECTURE & IMPLEMENTATION

1. Lead Management Automation – Zoho CRM

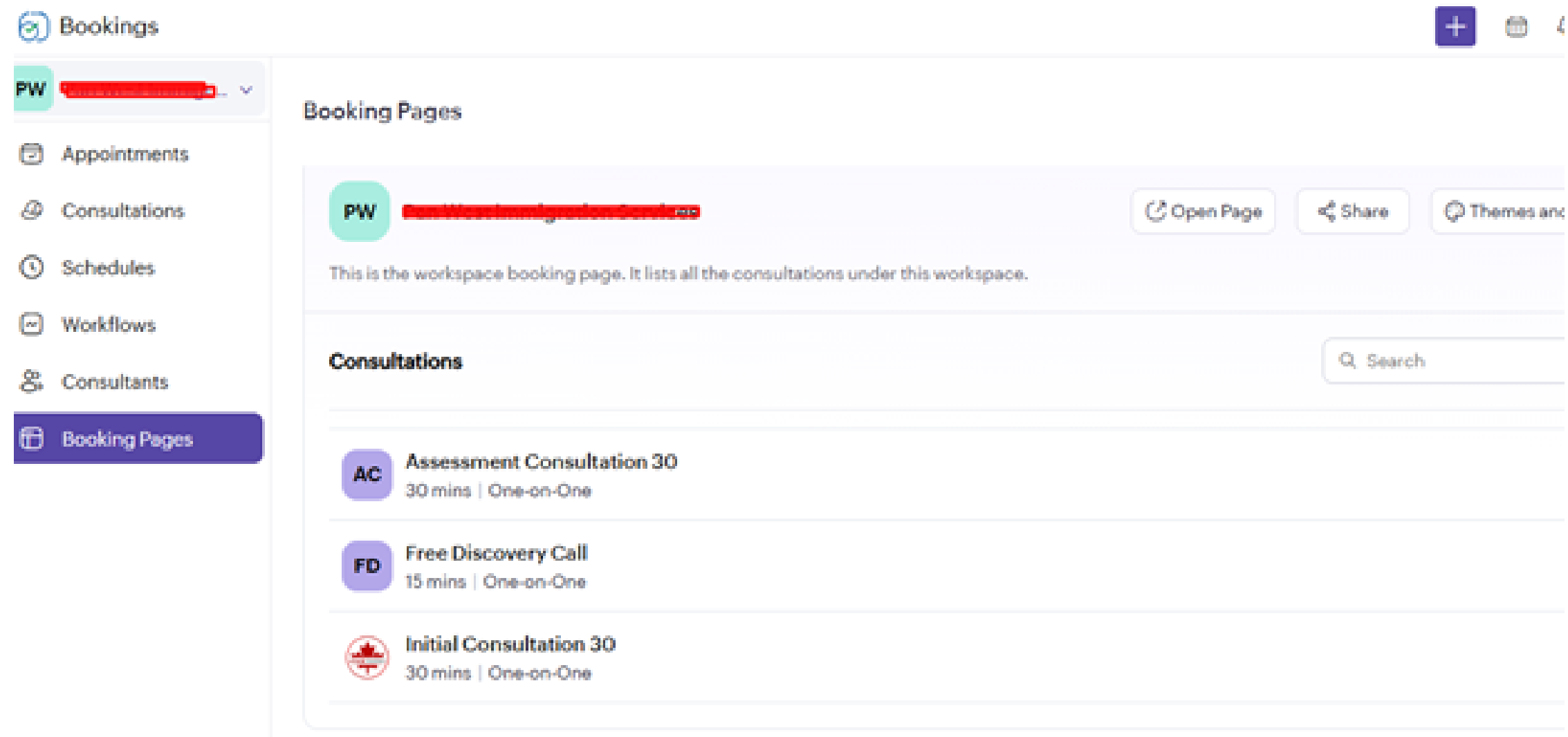
- A complete lead lifecycle was engineered in Zoho CRM, ensuring every inbound inquiry is captured, assigned, and nurtured without manual intervention.
- Automated lead assignment rules based on consultant availability and specialization
- Lead stage management with defined pipeline gates
- Automated lead nurturing workflows and follow-up task/reminder generation
- Consultant assignment logic and custom immigration-specific modules
- Custom validation rules enforced at data-entry level
- Automated lead-to-Contact and lead-to-Deal conversion with full activity tracking



2. Appointment Booking Automation – Zoho Bookings

A booking system was built from the ground up to support both free and paid consultations, fully synchronized with CRM.

- Multiple consultation booking pages (free and paid)
- Stripe payment integration embedded in the booking flow
- Consultant-wise scheduling with automatic meeting URL generation
- Public booking pages plus in-CRM booking via a custom action button



3. Payment Processing – Stripe Integration

- Stripe was integrated directly with Zoho Bookings to remove manual payment handling from the consultation workflow.
- Secure online payment collection at time of booking
- Automatic payment verification and booking confirmation
- Real-time synchronization of payment status back to CRM

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5. CRM Activity Synchronization

Every booking event – details, payment status, meeting information, and related activity – is written back into Zoho CRM, giving consultants a complete customer timeline and consultation history before every session.

6. Automated Document Management – Zoho WorkDrive

On successful booking, a dedicated customer folder is auto-created in WorkDrive, pre-populated with visa-specific documents and standard immigration PDFs relevant to the consultation type – eliminating manual document organization.

7. Consultant Qualification Workflow

Following consultation, consultants assess eligibility directly in CRM. Qualified prospects convert to Contact and Deal records; non-qualified prospects remain in the Lead Management pipeline for continued nurturing.

8. Visa-Specific Process Documentation

From the Contact module, consultants trigger the correct process document (Student Visa, Work Permit, Visitor Visa, PR, LMIA, Express Entry, PNP) based on the client's selected visa category.

9. Digital Agreement Signing – Zoho Sign

Retainer agreements are generated, emailed, and digitally signed end-to-end, with the signed copy returned automatically and archived in the client's WorkDrive folder – removing paper-based documentation entirely.

10. Structured Customer Intake – Zoho Creator

Custom intake forms, triggered via a CRM action button, capture immigration-specific client data, generate a PDF summary automatically, and store it in the client's WorkDrive folder – reducing manual data entry and standardizing intake quality

DATA & INFRASTRUCTURE MIGRATION

1. Microsoft 365 → Zoho Mail Migration

- A complete organization-wide mailbox migration was executed with zero critical email loss.
- Full mailbox, historical email, and contact migration
- Folder structure and attachment preservation
- Domain, MX record, SPF, DKIM & DMARC configuration
- Post-migration validation and user acceptance testing
- Business continuity maintained with minimal downtime

2. Legacy CRM Migration – Officio.io → Zoho CRM

- This was among the most technically demanding phases of the project, involving hundreds of custom fields, complex parent-child module dependencies, multiple visa-specific workflows, and duplicate records across a large historical dataset.
- Detailed field-by-field mapping document prepared per CRM module
- Data transformation, normalization, and lookup/dependency mapping
- Pre-migration validation and duplicate detection
- Import verification and post-migration reconciliation

DATA QUALITY, SECURITY & GOVERNANCE

1. Validation Framework

- Mandatory and visa-specific field validation
- Duplicate email and mobile number validation
- Stage-based, booking, payment, and process-completion validation
- Required document verification prior to stage progression

2. Security Controls

- Role-based access control across modules
- Secure, permission-controlled WorkDrive folder structure
- Digital signature authentication via Zoho Sign
- Secure Stripe payment processing
- Encrypted communication and full audit trail
- Data-loss protection throughout the migration process

REPORTING & MANAGEMENT VISIBILITY

A comprehensive Lead Management Dashboard was built to give leadership real-time visibility into pipeline health and consultant productivity.

Dashboard Area	KPIs Tracked
Lead Pipeline	Total Leads, New Leads, Converted Leads, Lead Source, Lead Stages
Operations	Pending Follow-ups, Today's Tasks, Meetings, Activity Summary
Performance	Consultant Performance, Customer Pipeline, Booking Statistics

BUSINESS IMPACT

Area	Outcome
Lead Management	Automated assignment and nurturing; reduced response time
Booking & Payments	Integrated Stripe-powered booking with zero manual verification
Communication	Automated, dual-channel (Email + WhatsApp) customer touchpoints
Document Management	Centralized, auto-organized WorkDrive repository per client
Agreements	Fully digital, paperless signing workflow
Data Migration	Zero critical email loss; accurate legacy CRM migration with full field mapping
Data Quality	Significantly improved through multi-layer validation rules
Visibility	Real-time dashboards for pipeline, consultant, and revenue tracking

CONCLUSION

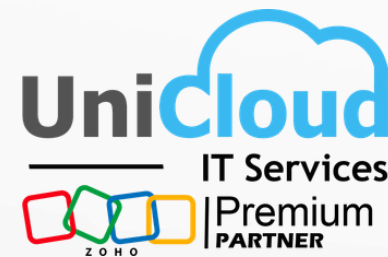
Pan West Immigration Services successfully transformed its operations through an integrated Zoho One ecosystem connecting Zoho CRM, Creator, Bookings, WorkDrive, Sign, Flow, Mail, and Desk, alongside Microsoft 365, Stripe, and Respond.io. The engagement automated the complete customer journey – from lead generation through consultation booking, payment processing, onboarding, document collection, digital signature, communication, and reporting – while ensuring business continuity through a zero-loss email migration and an accurate, dependency-aware legacy data migration from Officio.io.

The result is a scalable, secure, and fully automated immigration management platform that materially improved operational efficiency, consultant productivity, customer experience, and management visibility – establishing a strong technical foundation for the organization's continued growth.

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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