alt.f coworking

Client Name: Sahil Chopra

Country: India

Total Users: 114

Subscription: Zoho One



ABOUT

alt.f coworking is an Indian coworking and flexible workspace company that started in Gurgaon in 2016 and was featured on Shark Tank India Season 4. It offers private cabins (team rooms, director cabins and office suites), On-The-Go plans (day passes and meeting rooms), virtual offices (business address, GST registration and business registration plans) and Elevate, its advertising and event offering inside its spaces.

The company operates 20+ locations across 6+ cities, including Delhi NCR, Hyderabad, Mumbai, Pune and Bangalore, with 18,000+ seats. It reports more than 10,000 professionals and 1,500 growing businesses as members.



PROJECT OVERVIEW

alt.f receives enquiries for desks, private cabins, virtual offices and meeting rooms across many centres. Each enquiry has to be qualified, matched with the right centre, quoted, converted into a membership and then billed every month. The client needed sales and finance to work from one connected system. We implemented Zoho CRM for the sales and centre teams and Zoho Books for billing and accounting, and integrated the two for 114 users.

PROJECT OBJECTIVES

The objective was a single flow from enquiry to invoice: leads captured automatically, deals tracked through a standard process, and billing raised in Zoho Books as soon as a membership is won, with no re-entry of customer data.

CHALLENGES

Before the project, the client faced the following challenges:

- Enquiries from the website form, calls, WhatsApp, brokers and property partners were not tracked in one place.
- Lead details such as city, workspace type and number of seats had to be re-typed by hand.
- Sales teams across centres followed different processes for quotes and follow-ups.
- After a deal closed, customer and plan details were entered again into the accounting system for invoicing.
- Recurring membership invoices, security deposits and GST were handled manually and were open to delay and error.
- Management could not easily compare enquiries, conversions and collections by centre.

SOLUTIONS

UniCloud IT Services implemented Zoho CRM and Zoho Books and connected them so that data flows from the first enquiry to the final payment.

Lead Capture in Zoho CRM

We connected the website enquiry form to Zoho CRM so that each submission creates a lead automatically. The lead holds the fields the team needs: workspace type (private cabin, On-The-Go, virtual office or Elevate), city, number of seats (4-8, 8-20, 20-40 or 40+) and source. Duplicate checks avoid double entries when the same company enquires through more than one channel.

Lead Assignment and Follow-Ups

Assignment rules route each lead to the right sales user by city and workspace type. Tasks and reminders are created automatically for first contact, site visits and quote follow-ups, so that no enquiry is left waiting.

Deals and Quotations

Qualified leads convert into deals that move through a standard pipeline: Enquiry, Site Visit, Proposal Shared, Negotiation, Agreement and Closed Won or Closed Lost. Quotes are prepared in CRM from a product list of plans (seats, cabins, virtual office plans, meeting rooms) with centre-wise pricing.

CRM to Zoho Books Integration

When a deal is won, the customer, plan, seats, rate and billing details move from Zoho CRM to Zoho Books. The finance team does not enter the same information again. Invoices and payment status are visible against the CRM record, so sales can see what has been billed and paid.

Billing and Accounting in Zoho Books

In Zoho Books we set up items for each plan, GST-compliant invoices, recurring monthly invoices for memberships, one-time invoices for deposits, day passes and meeting room bookings, payment tracking and reminders, and reports for receivables and revenue by centre.

Roles and Dashboards

With 114 users, we configured roles, profiles and permissions so that centre teams, sales, finance and management each see what they need. Dashboards show enquiries by source and city, deals by stage, conversions by centre, invoices raised, collections and outstanding amounts.

FEATURES AND FUNCTIONALITIES

- Zoho CRM and Zoho Books implemented and integrated for 114 users.
- Website enquiry form connected to CRM leads.
- Duplicate detection and assignment by city and workspace type.
- Standard deal pipeline with automated tasks and follow-ups.
- Quotations with plan-wise and centre-wise pricing.
- Automatic transfer of customer and plan details from CRM to Books on deal win.
- GST invoices, recurring membership billing, deposits and payment reminders.
- Role-based access and dashboards for sales, finance and management.

Figure 1: Leads in Zoho CRM. Enquiries with workspace type, city, seats, source, owner and status.

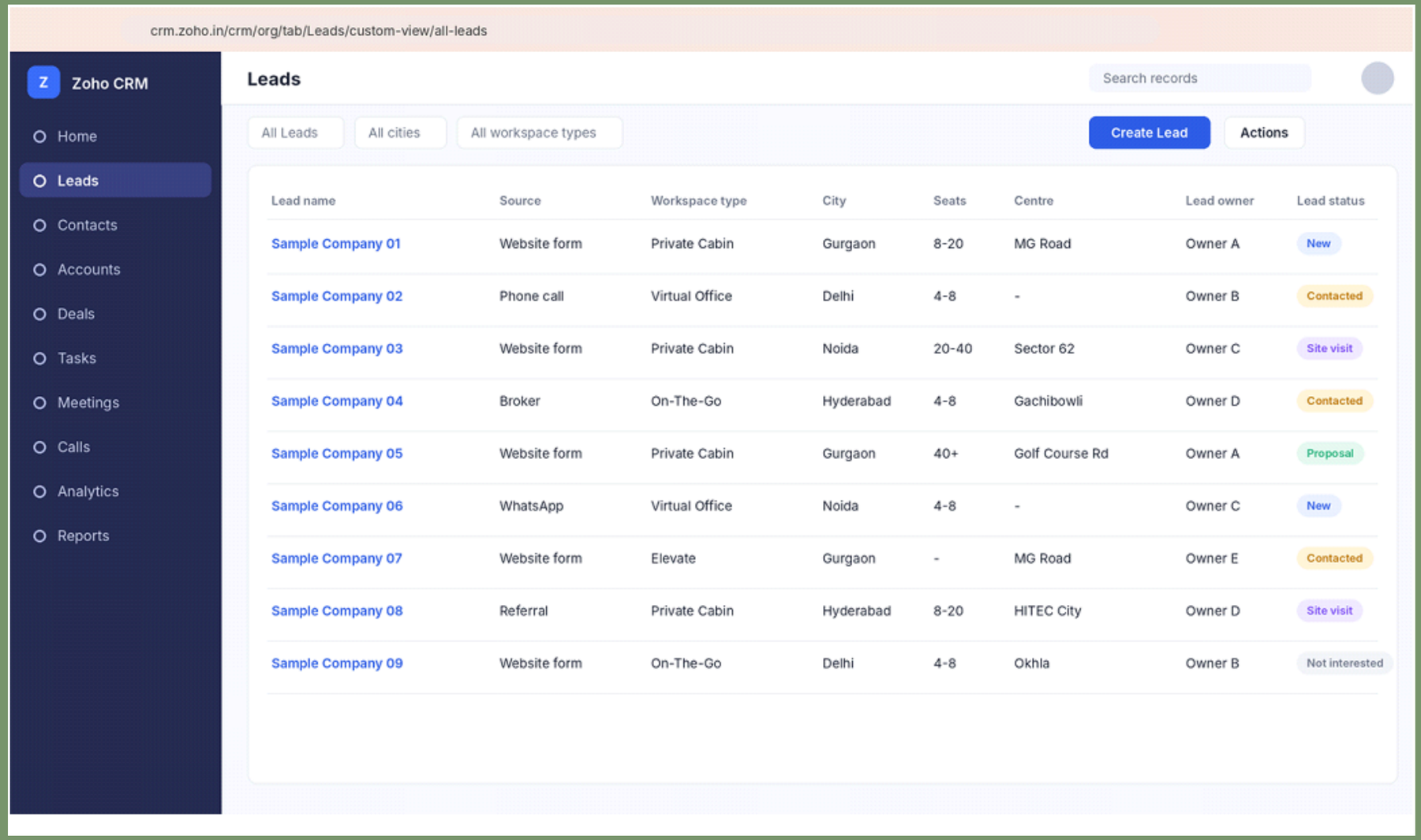


Figure 2: Deals pipeline. Deals by stage from enquiry to closed won.

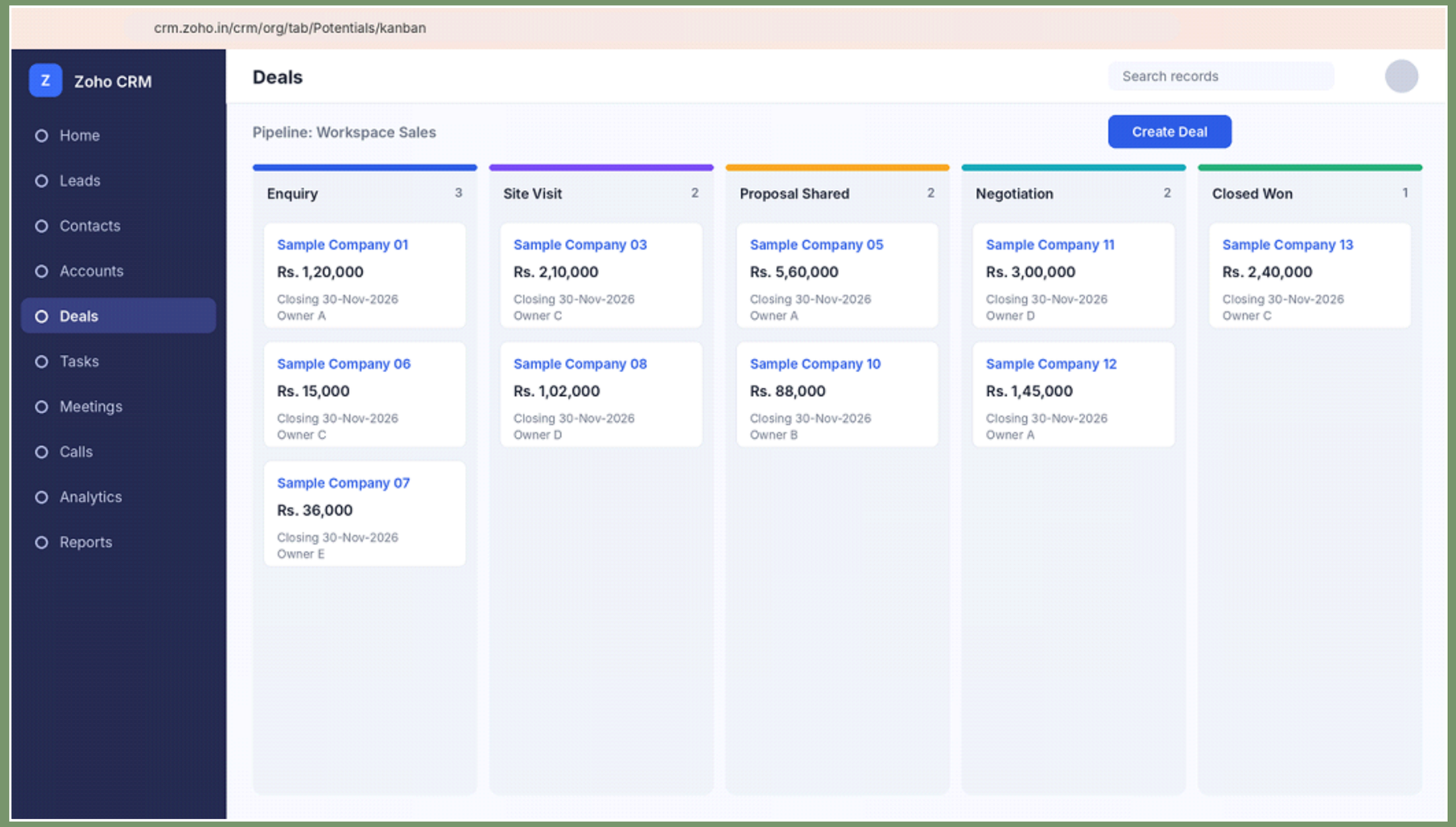
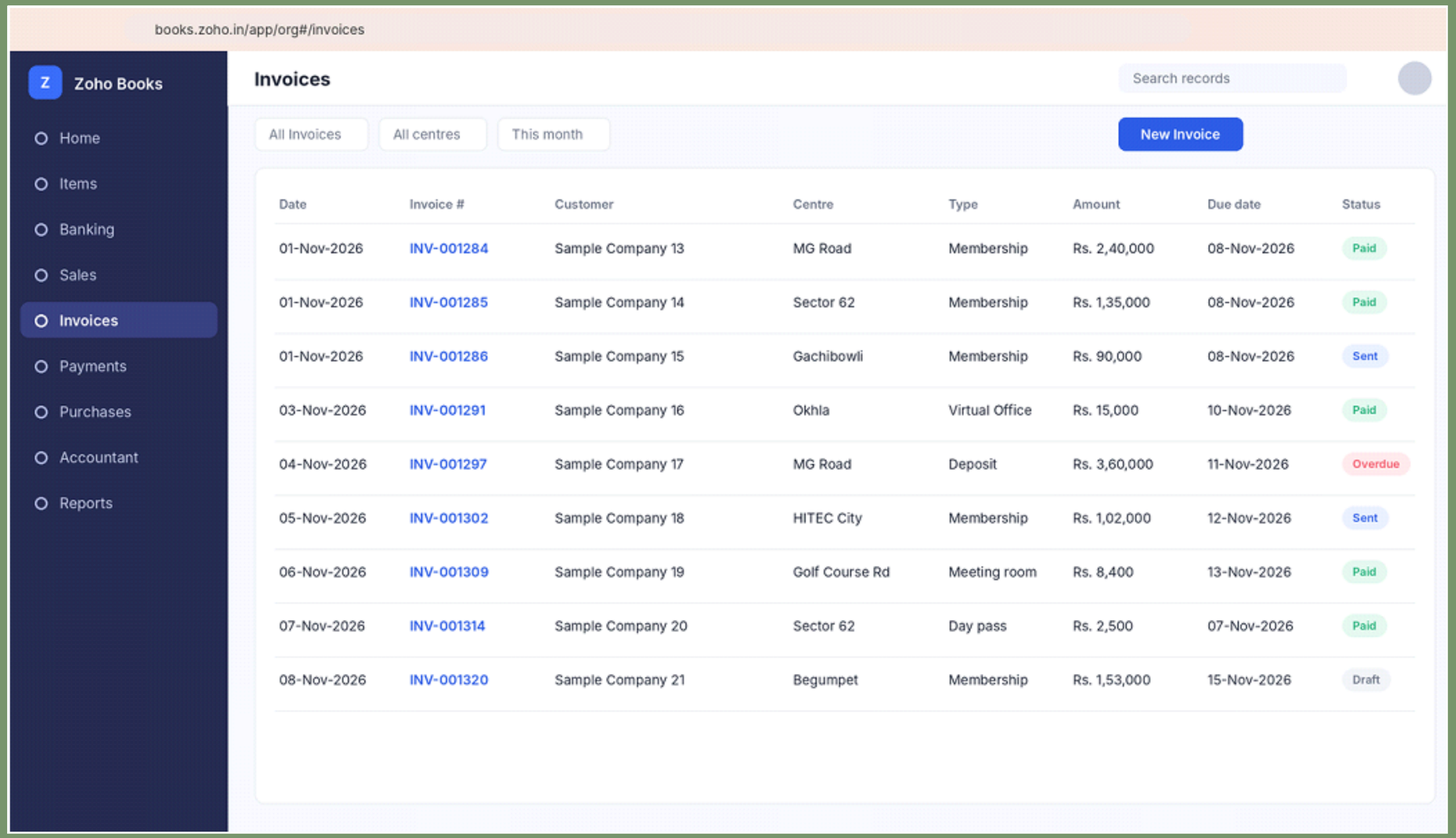
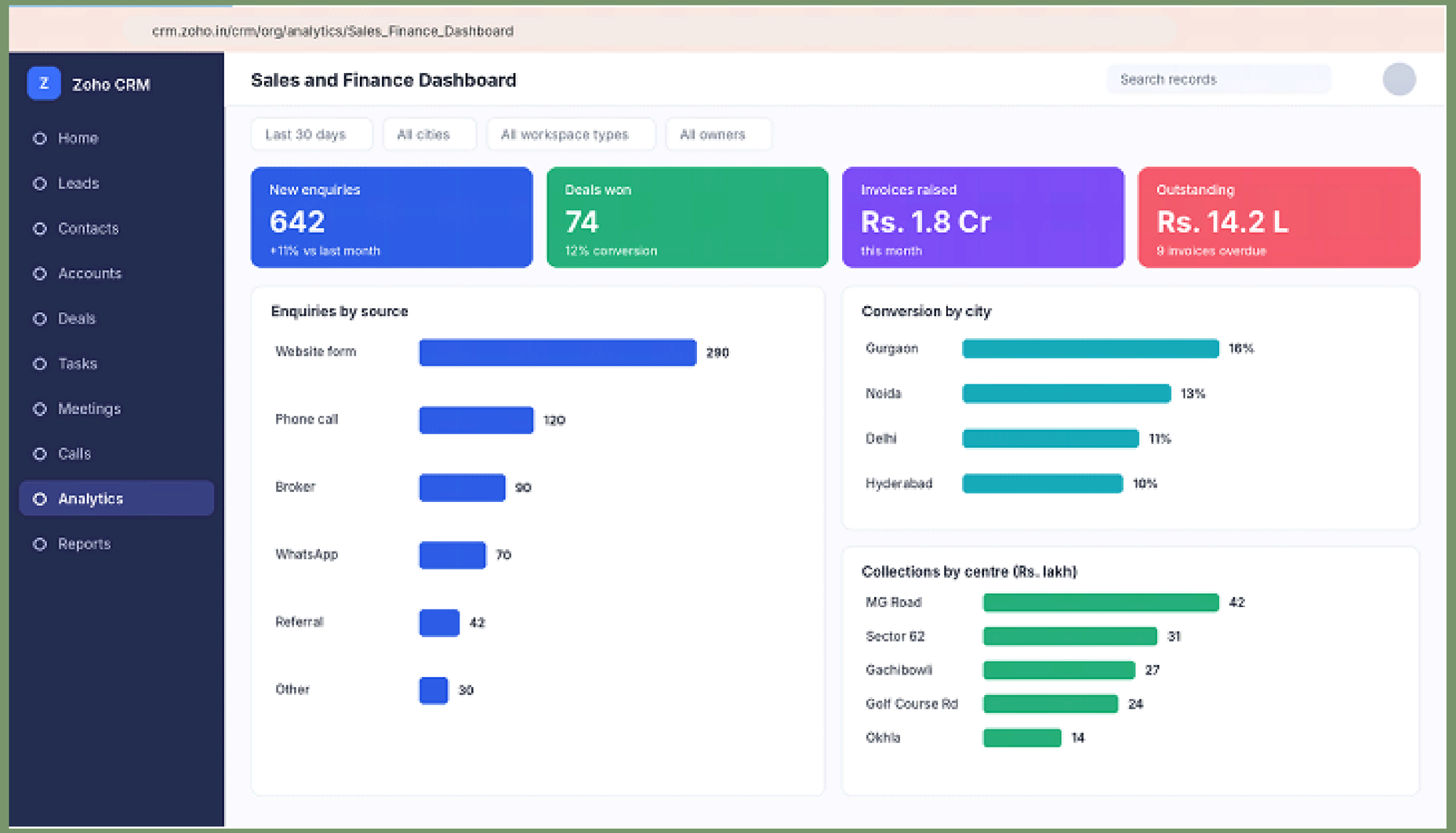


Figure 3: Invoices in Zoho Books. Membership invoices with customer, centre, amount, status and due date.



Sales and finance dashboard. Enquiries, conversions by city, invoices raised and collections.



CONCLUSION

alt.f coworking now runs enquiry, deal and billing in one connected flow. Leads are captured and assigned automatically, deals follow one process, and a won deal creates the customer in Zoho Books without re-entry. Recurring invoices, deposits and GST are handled in one place, and management can see enquiries, conversions and collections by centre.

This supports the company as it adds locations and cities. The setup can be extended with further automation, payment gateway integration and reports as the business grows.

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.

UniCloud IT Services
ZOHO Premium PARTNER

https://www.unicloudits services.com