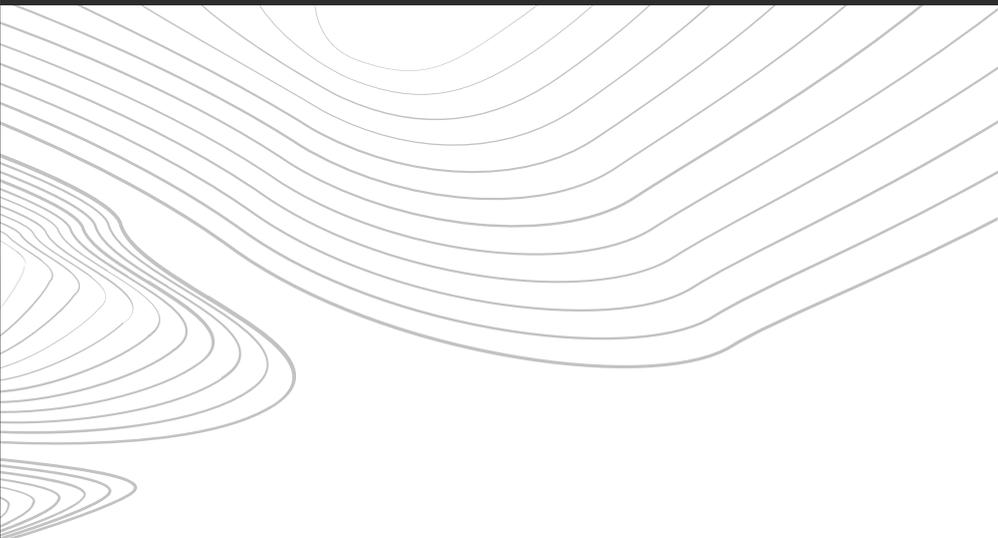




GROW **M**ORE

# Business Process Optimisation with **Zoho**



## The Ultimate Guide

---

Includes an exclusive  
look at Zoho Creator 6!

# Welcome to your guide from the experts at GrowMore!

At GrowMore, we are helping businesses eliminate the learning curve when it comes to Zoho. With its ability to streamline workflows, automate the client cycle, and more, the benefits of Zoho are endless. We've been fortunate to work alongside businesses as they've discovered all of the ways Zoho can help them grow. Now we're pleased to bring some of our Zoho solutions and tips to you.

# Zoho: A Suite of Tools for All Your Business Needs

When you own a business, every minute of your workday counts. You're collecting leads, generating sales, communicating with clients, organizing spreadsheets, sending invoices, managing finances, completing payroll, tracking hours, measuring productivity, overseeing projects, and more.

**When time is literally money, you have no time to waste. If you find that you're sinking under the weight of tasks and not dedicating enough time to the long-term responsibilities that keep your business growing, perhaps it's time to save time with Zoho.**



Zoho is one of the leading operating systems for businesses. With its suite of software, apps, and tools, it helps businesses like yours manage complicated workflows, generate faster sales, create richer reports, track various expenses, and so much more. Regardless of your needs, Zoho has a solution that will help you skip the work and get back to business.

# Automate Your Business

There are plenty of useful Zoho products to choose from, but this brief guide will focus on six applications that achieve the best business process optimization: CRM, Creator, Analytics, Invoice, Books, and Subscriptions.

Every single one of these products works wonders on their own; however, they also work seamlessly together, keeping all of your data in one location and forming the ultimate business process optimization strategy. Each of these tools is a separate piece of a puzzle, all fitting perfectly together to successfully automate your business.



## It's Alright to Start Small

There's no need to jump into every Zoho product featured in this guide all at once. While there are plenty of "all or nothing" decisions you have to make as a business owner, Zoho isn't one of them.

When it comes to Zoho, you can start small. If client management is your biggest priority and you don't mind filing invoices and organizing subscriptions manually, start with CRM. As your business grows and evolves to the point where it can efficiently adapt to additional Zoho solutions, you can add in more applications.

In addition, Zoho is always changing and transforming. New applications are added as the company thinks of different ways business tasks can be improved. Whenever your business is ready, Zoho is sure to have a solution on hand.

We hope you find this introductory guide to Zoho, its products, and its benefits useful. Like we said before: time is money. So let's get started.

# Zoho Applications

Even if you already have Zoho, we can help you make more out of the business process optimization tool. Grow your business and improve your relationship with clients by integrating multiple tools and applications with your existing Zoho account, including email automation, billing software, and contract solutions.

## > Zoho CRM

Generate sales quotes, send automated emails, and interact with customers.

## > Zoho Invoice

Create branded invoices, send automated reminders, and get paid online.

## > Zoho Analytics

Upload data from databases, create reports, and encrypt private info.

## > Zoho Creator

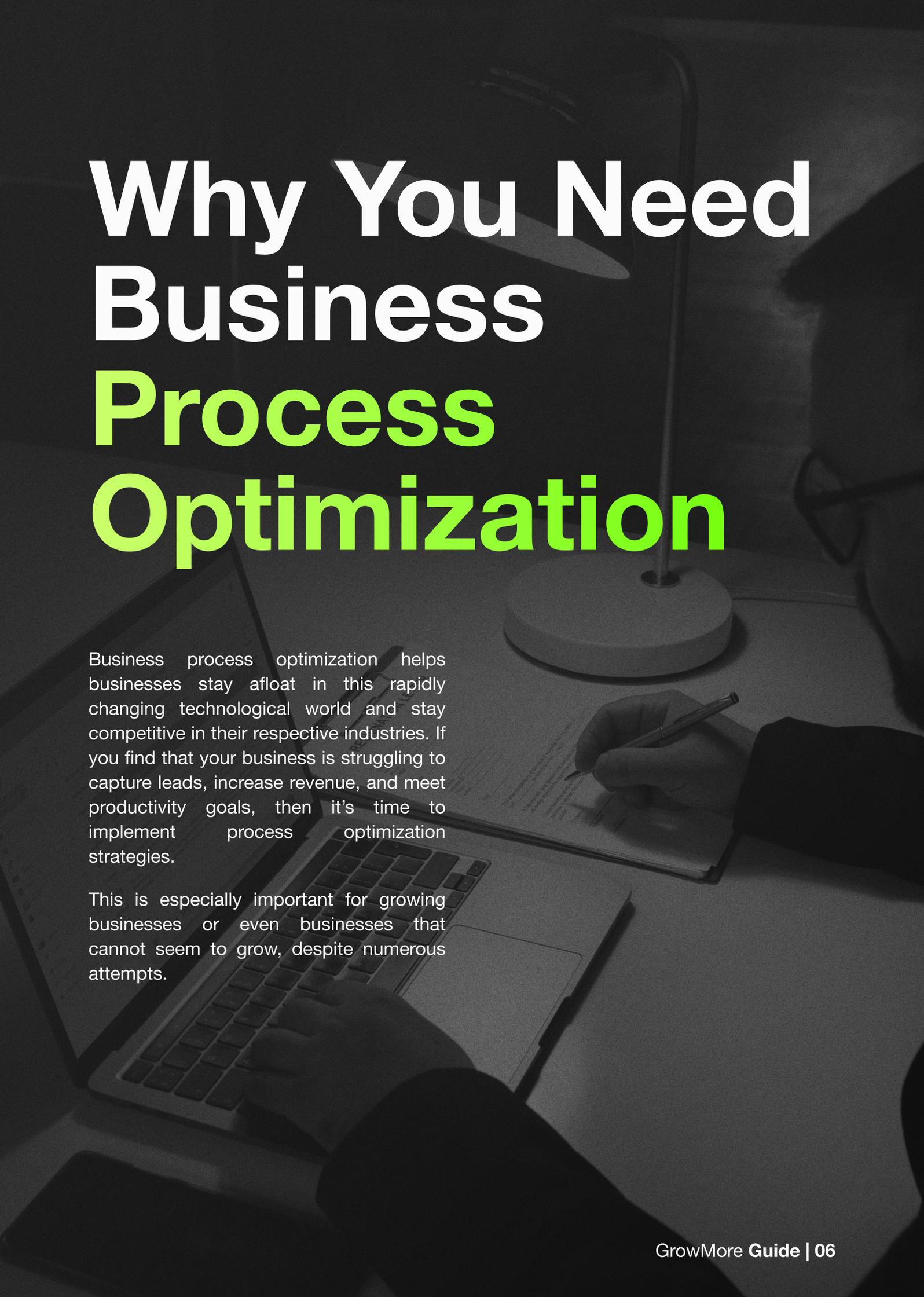
Automate documents, organize workflows, and merge data.

## > Zoho Books

Manage finances, send statements, and simplify payments via a client portal.

## > Zoho Subscriptions

Support online payments, follow-up with customers, and manage subscriptions.

A grayscale photograph of a person sitting at a desk, working on a laptop. A desk lamp is visible, casting light on the desk. The person's hands are visible, one holding a pen over a document. The overall scene is dimly lit, with the desk lamp providing the primary light source.

# Why You Need Business Process Optimization

Business process optimization helps businesses stay afloat in this rapidly changing technological world and stay competitive in their respective industries. If you find that your business is struggling to capture leads, increase revenue, and meet productivity goals, then it's time to implement process optimization strategies.

This is especially important for growing businesses or even businesses that cannot seem to grow, despite numerous attempts.

## Among the greatest benefits process optimization can offer a business are:

### Greater Efficiency

Employees may spend hours of their day keeping track of leads, scheduling follow-up emails, and running reports. Process optimization can cut down this time and streamline these processes.

### Lowered Costs

With employees spending less time on daily tasks like those mentioned, operational costs will decline. With fewer bottlenecks, there's more lead time, more market demand, more sales, and thus, more revenue.

### Increased Revenue

The needs of clients and customers will be met faster, which will undoubtedly lead to an increase in sales. Meanwhile, if your business is the first to capture and convert leads, it will stay competitive against the rest.

### Improved Transparency

When your business has the tools to see its performance in real-time, you'll have the ability to adapt and make changes, make improvements, and make important decisions.



# See how a **Zoho implementation** from GrowMore has benefited these businesses

“

**Zoho has enabled us to improve the quality and speed of our business intelligence...this provides us accountability to stakeholders.**

Rob Starr, Director of Marketing & Member Services, Starnet Flooring

---

**“Zoho, with tools like Creator and programming expertise from KDG, is a perfect fit for a small business like autopom!”**

Mike Jones, President & CEO, autopom!

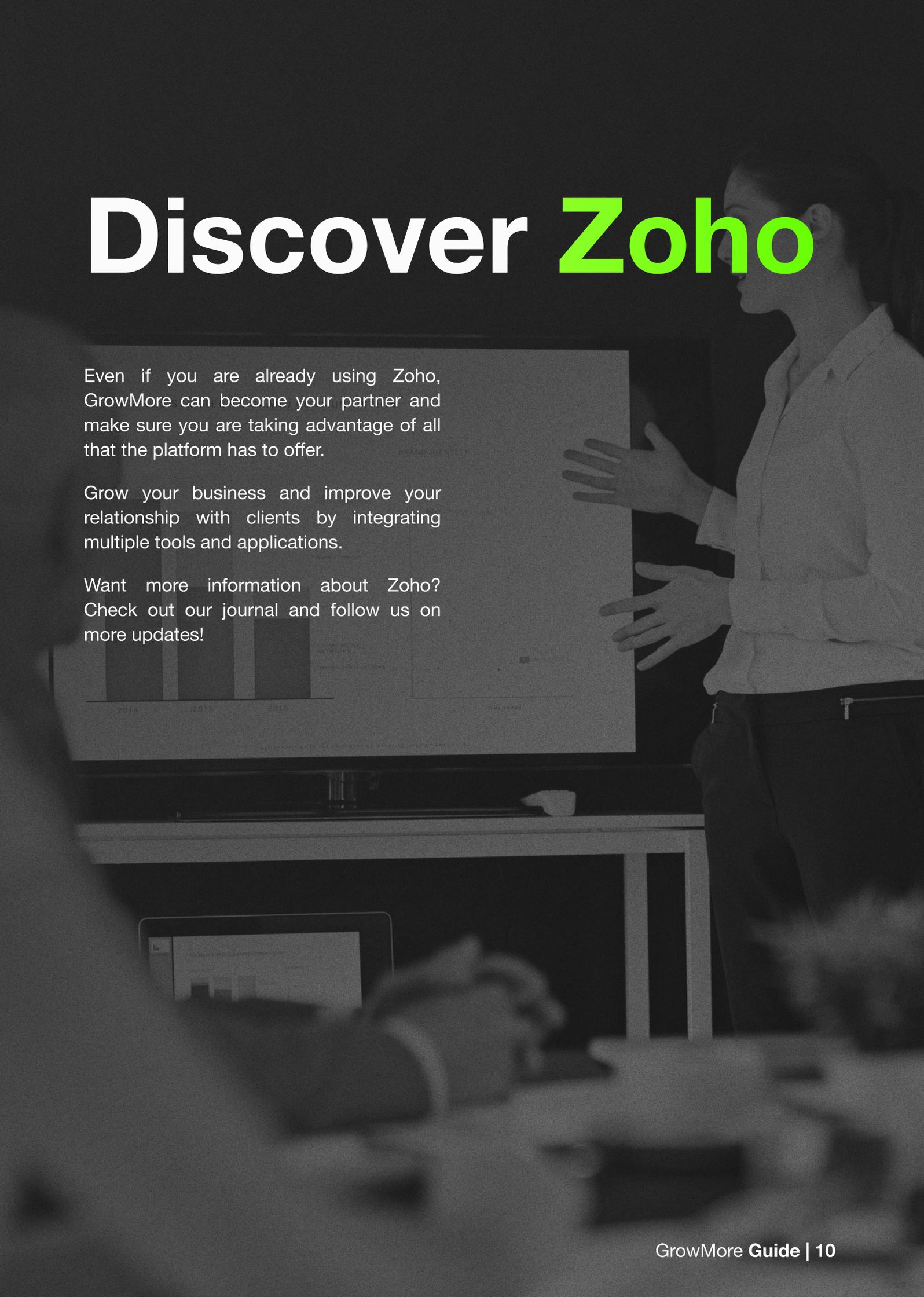


---

**“Zoho is an excellent resource for us. It allows us to create applications to support our workflow instead of having to change everything for pre-programmed workflow which might not apply.”**

David Bell, CEO, Syndicated Insurance Resources

# Discover Zoho



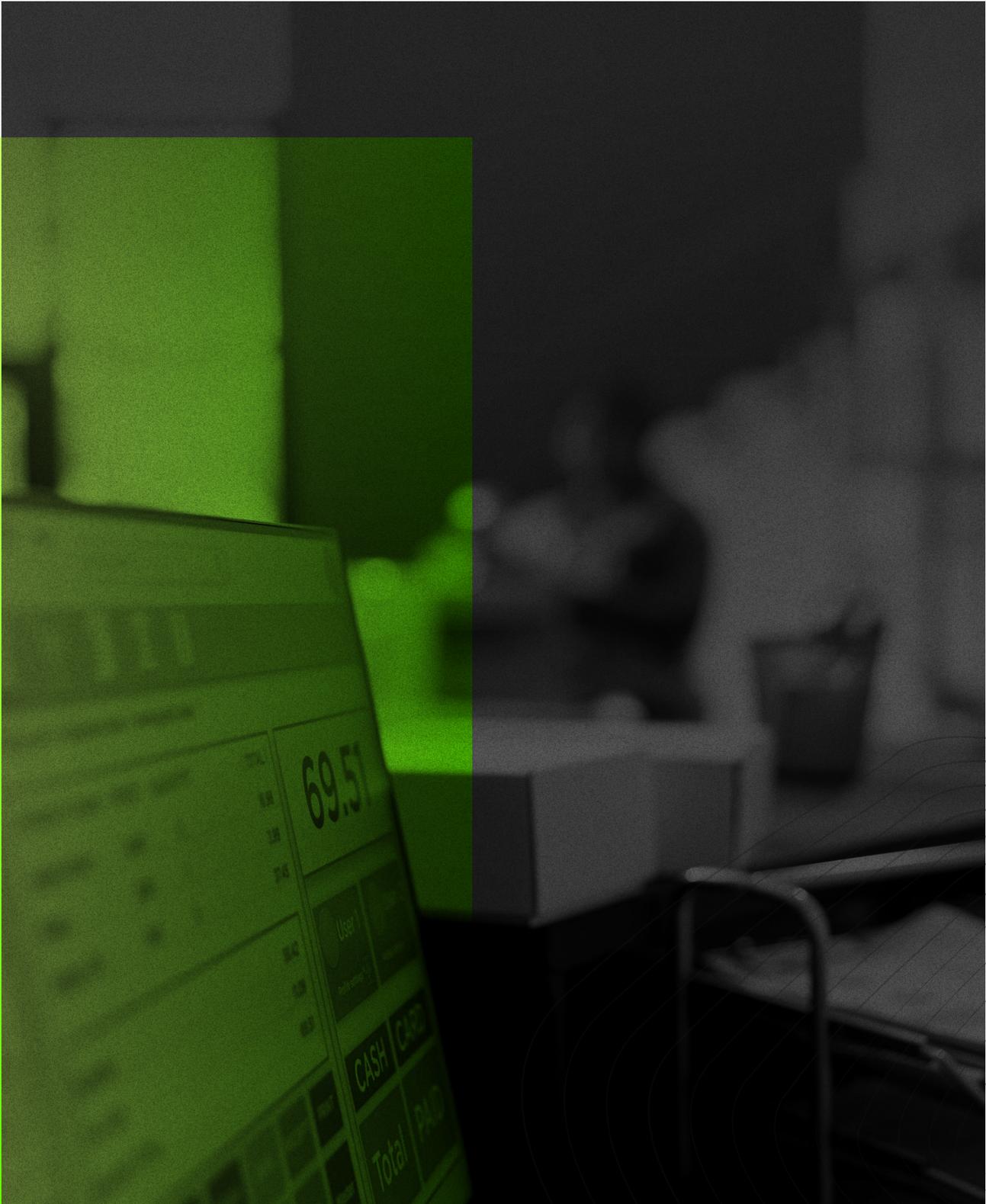
Even if you are already using Zoho, GrowMore can become your partner and make sure you are taking advantage of all that the platform has to offer.

Grow your business and improve your relationship with clients by integrating multiple tools and applications.

Want more information about Zoho? Check out our journal and follow us on more updates!

# Zoho CRM

Passing Leads Through  
the Pipeline



# Business owners know that a quality lead has the high potential to turn into a much-appreciated client or customer.

Manage your business leads efficiently so you don't lose what could be your next big deal.

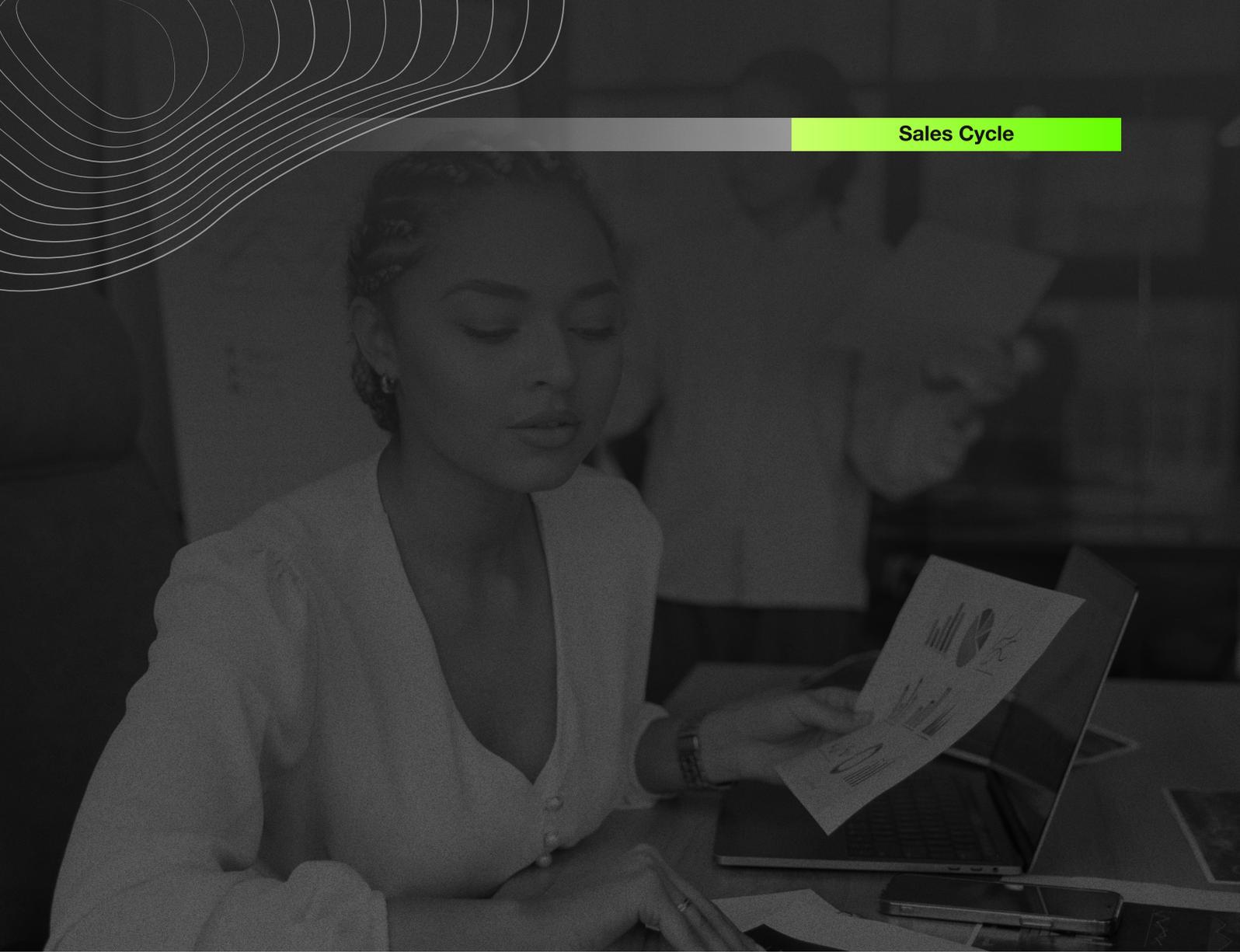
Zoho CRM turns leads into more than names in a database. The product guides you through the entire sales cycle and makes it easier for you to record leads, send automated emails, and generate quotes.

## Benefits That Empower Your Business

- Save time by automating routine tasks, like sales forecasts
- Keep leads engaged with automated emails, reminders, and follow-ups
- Identify quality leads through lead scoring and prioritization
- Customize your CRM and your processes with personalized data

## Did you know?

GrowMore is an officially authorised and certified Zoho partner in the Caucasus region with a demonstrated history of over 100 successful implementations.



## See More, Manage Less

Zoho CRM is fully compatible with a collection of other products from Zoho. It can integrate with Zoho Creator, allowing you to build custom apps that communicate directly with CRM.

You can also merge it with Zoho Books to keep track of valuable accounting info, or with Zoho Invoice so you can send and track clients' invoices. Meanwhile, data is no good if you can't actually make sense of it.

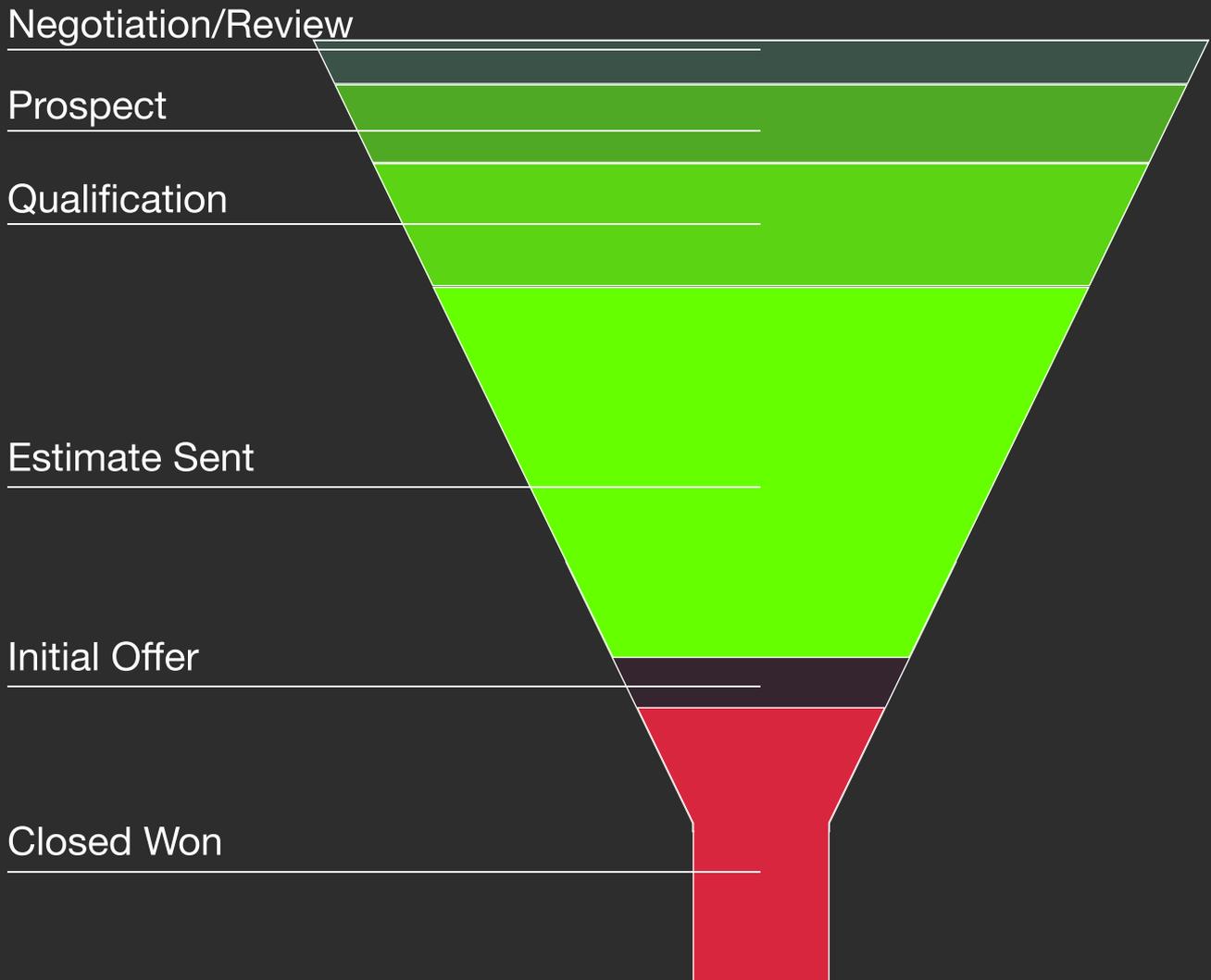
Connect CRM to Zoho Analytics to create reports that will help you make better business decisions moving forward.

## Control Your Sales Cycle

In sales, you always hear about pushing leads through the pipeline, but Zoho CRM gives you the chance to actually see your sales funnel in real-time.

Zoho gives you the ability to take control of, customize, and manage how you see and interact with the leads in your pipeline. Always know where they stand, from the time they've been contacted to when a proposal's been sent. Zoho makes it simple to follow every stage of your sales cycle and see which prospects are closing in on closing the deal.

# Control Your Sales Cycle



# Zoho Creator

## Creating a Custom Application



# Your business is uniquely your own, which means it needs customized applications and tools to help keep it performing at its best.

Zoho Creator helps businesses build customized apps fit for their internal processes. Its ability to automate workflow saves you time and keeps business running with very few breaks.

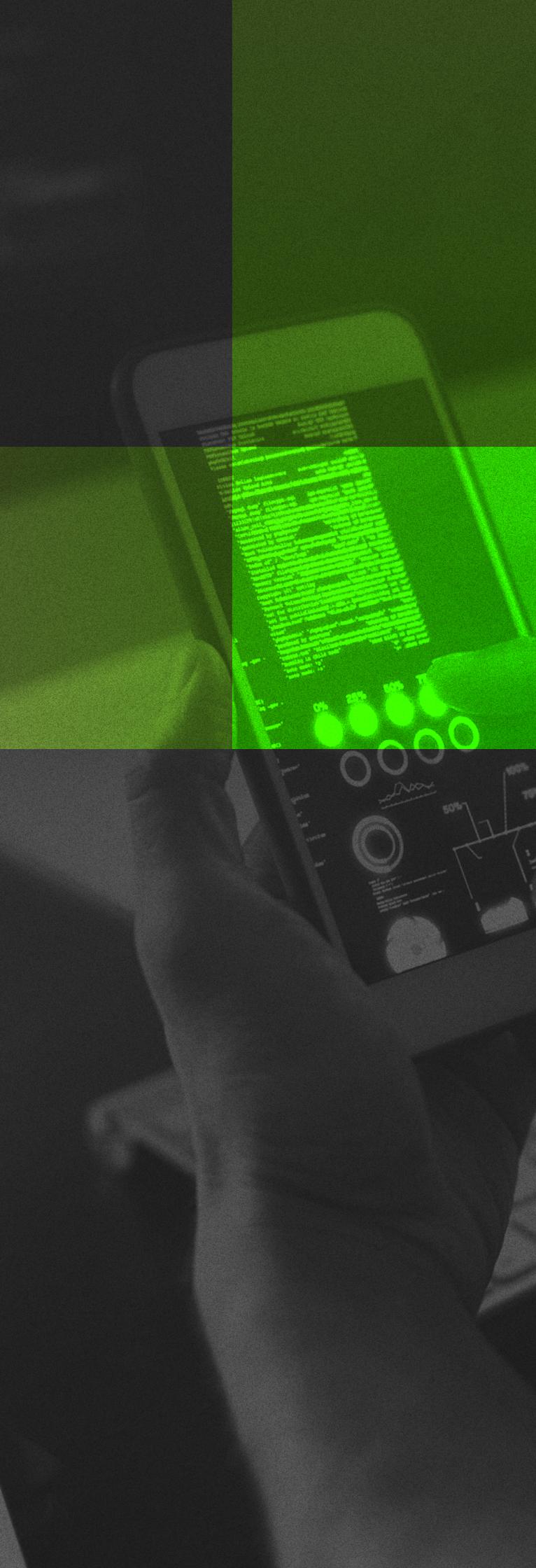
Plus, Creator's apps are fully compatible with both iOS and Android so you can do business on the go. The world's marketplace has gone mobile and so should you.

## Apps That Keep Your Business Connected

- Drag and drop selected features to puzzle together your custom apps
- Stay organized by scheduling tasks
- Go mobile by building apps optimized for iOS or Android
- Automate workflows with Creator's scripting capabilities

## Did you know?

Zoho Creator's App Deck features 50+ ready-to-use apps for your business.



# Created By Zoho, Customized By You

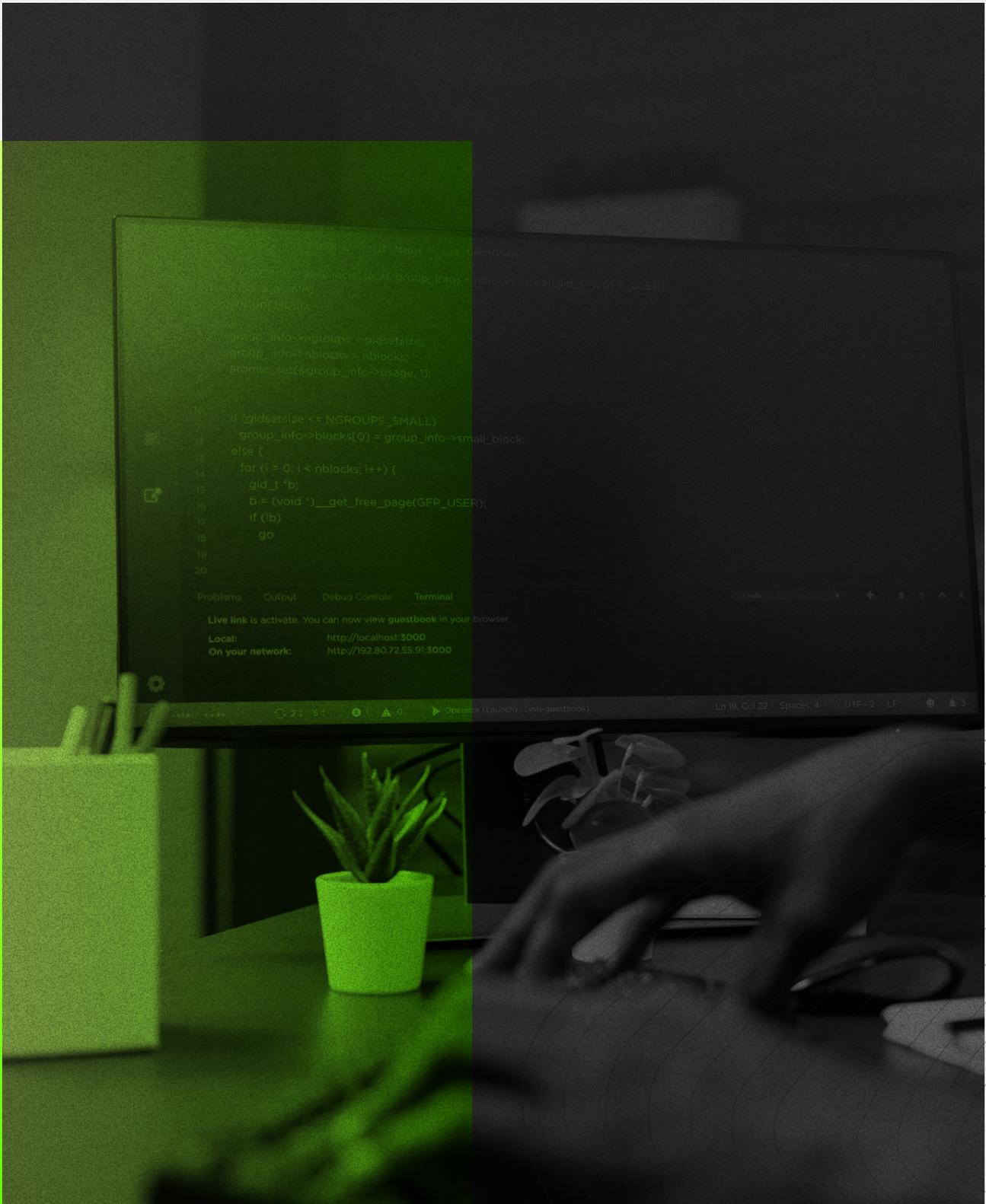
With so much data being collected by your apps, you need reports to make sense of it all.

With the addition of Zoho Analytics, you can create, collect, and analyze reports on all of the data you've collected through your customized applications. Creator also works well with Zoho Subscriptions. Create, update, and pull client and customer records between the two products.

You can even integrate Creator with a variety of third-party vendors, like Twilio, Quickbooks, VoIP, and Bill.com.

# Zoho Creator 6

A Unified Platform for All Your Business Needs



# Zoho Creator 6

The latest Zoho Creator combines five powerful Creators— for application development, business intelligence & analytics, smart integrations, and process automation—into one single platform, enabling businesses to deliver end-to-end business solutions efficiently.

- › **Multi-developer environment**
- › **Connects with 650+ cloud-based apps**
- › **Supports Java & Node.js**
- › **Mobile compatibility**
- › **AI fields like keyword extractions, object detection, and address parsing**

# The Benefits of C6

## Low Code

If you want to create an automation, it's simply a drag-and-drop process.

## Intelligence & Insights

Create data visualizations and dashboards by connecting to any data source.

## Countless Integrations

Integrate with applications within the Zoho Suite, or third-party tools like Eventbrite, Microsoft Office, BaseCamp, etc.

## Customizable

Create dedicated user portals for customers that are branded with personalized content and logos.

## Secure

Compliant with GDPR, HIPAA, & ISO/IEC, with 7x24x365 data center monitoring.

## Mobile Compatibility

Includes mobile-native functionalities like GPS, push notifications, & cameras.

## A Creator for Everyone! Who will benefit from C6? Everyone!



### Manufacturing

Build apps that pay vendors, assist with quality control, and fulfill inventory.



### Professional Services/ Consulting

Build apps that track time, send invoices, manage resources, and forecast budgets, engagement, and performance.



### IT

Build apps that monitor hardware/software, track bugs, and implement and monitor policies.

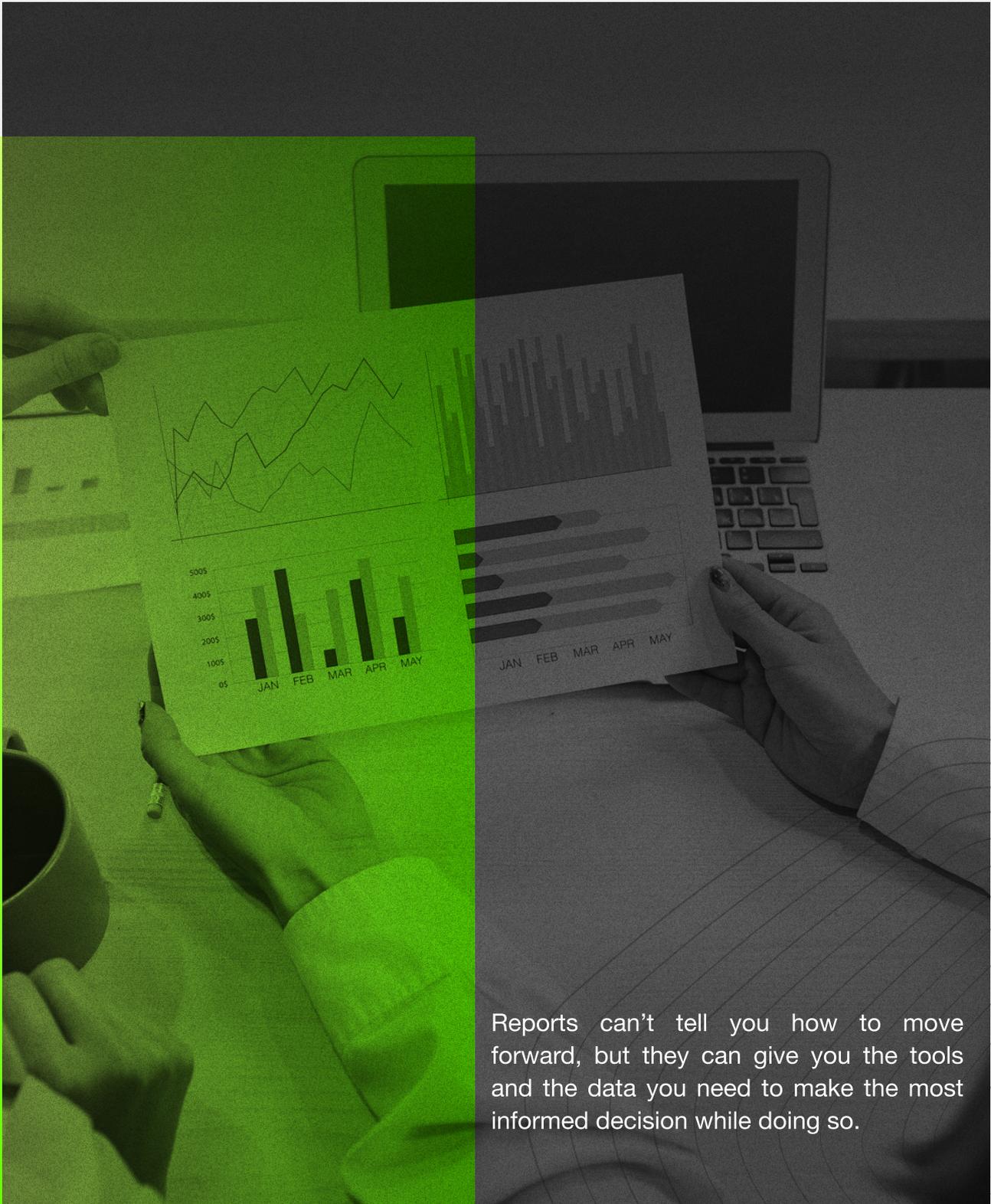


### HR

Build apps to help recruit new employees, manage approvals, and replicate paper-based systems.

# Zoho Analytics

Making Sense  
of Data



Reports can't tell you how to move forward, but they can give you the tools and the data you need to make the most informed decision while doing so.

# Insightful charts, easy-to-read tables, and detailed dashboards from Zoho Analytics organize months' worth of data within minutes.



## Data Doesn't Have to Be Difficult

- Upload data and spreadsheets from existing databases and software
- Combine data from multiple sources, whether that data is big or small
- Create visual dashboards with images, widgets, charts, and no coding
- Publish and share your findings with others on your team

## Did you know?

Small business owners report spending up to 10 hours per month on bookkeeping and payroll.

## Dig Deeper into Your Data

Perhaps the biggest benefit of Zoho Analytics is the fact that you don't have to buy into the entire Zoho suite just to experience its benefits. Instead, Analytics is fully cross-functional and compatible with any application, whether that application is in the Zoho suite or not.

**Zoho can help you dig deeper into your data no matter which legacy system your business uses. All of your legacy systems can communicate directly with Reports. Run reports on your finances from QuickBooks or analyze your email opens and clicks from MailChimp. See visuals on your Google Analytics metrics and view displays on your Zendesk help support numbers.**

Analytics also features Upload Tool, which can help you pull data from relational databases like MySQL, NoSQL databases, and even cloud databases. Measure data from different sources, import data from various files, and then sync all of that data together. With Analytics, you'll have all of the data you need right at your fingertips.

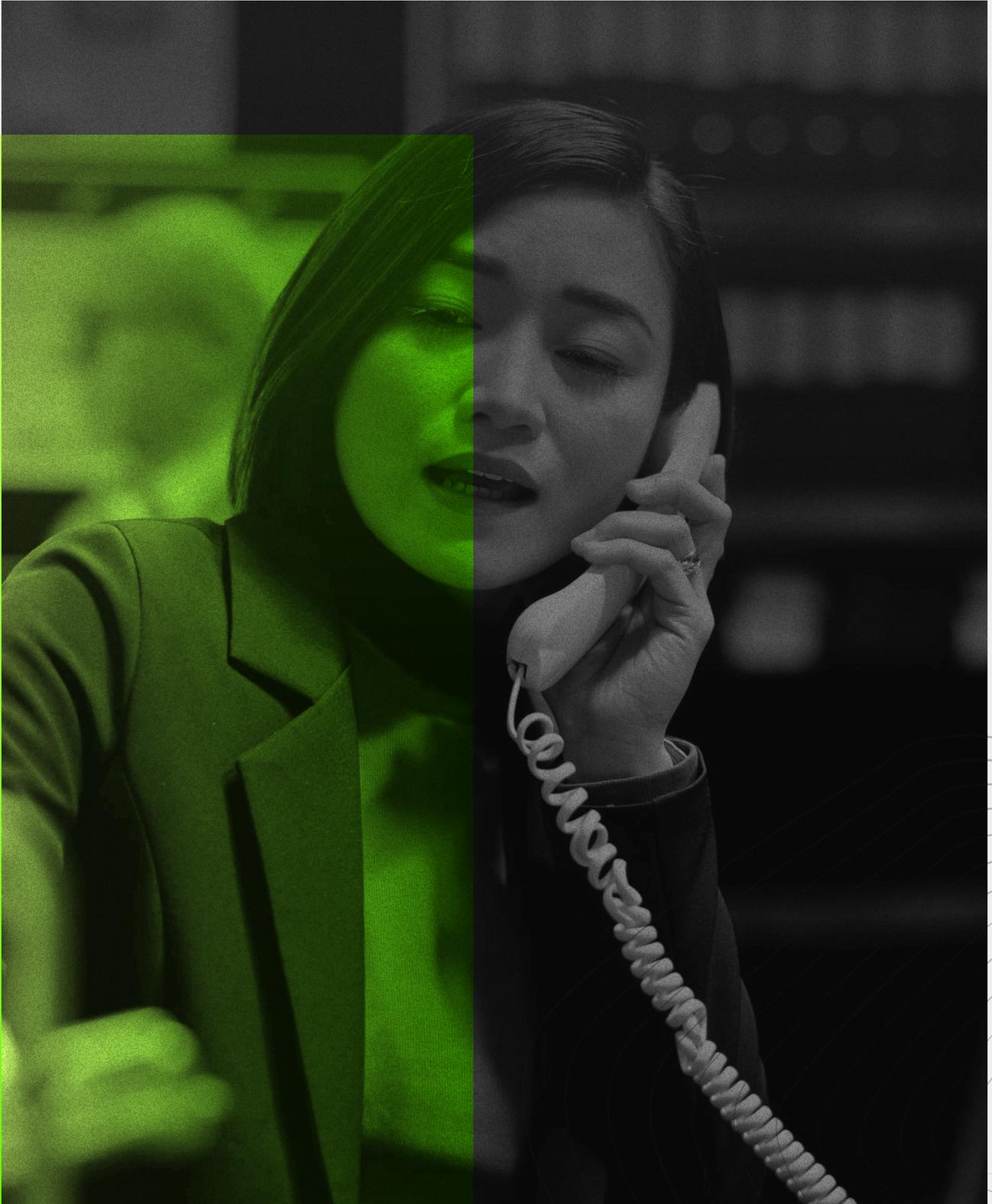
# See Snapshots of **Your Data**



Get summary reports on your most important data through insightful dashboards. Creating a new dashboard on data like lead statuses is simple thanks to Zoho's drag and drop features. Choose from a series of colorful themes and arrange your reports in any layout you find useful, from bar graphs to pie charts. Meanwhile, show only the information you find most important and hide the extra data you don't need.

# Zoho Invoice

Getting Paid  
Faster



# How much time do you spend managing invoices?

## Why is Zoho Invoice a good choice?

Completing paperwork, sending bills, dealing with online payments that won't come through, waiting for late payments—hours are spent simply trying to get paid.

Save the paperwork, save the time, and save the stress with Zoho Invoice.

## Apps That Keep Your Business Connected

- Create branded invoices within minutes
- Send automated reminders to customers when a bill is due
- Track time that you and your team spend on projects
- Receive online payments quickly through a variety of payment gateways

# Syncing, Logging, & Reporting Data

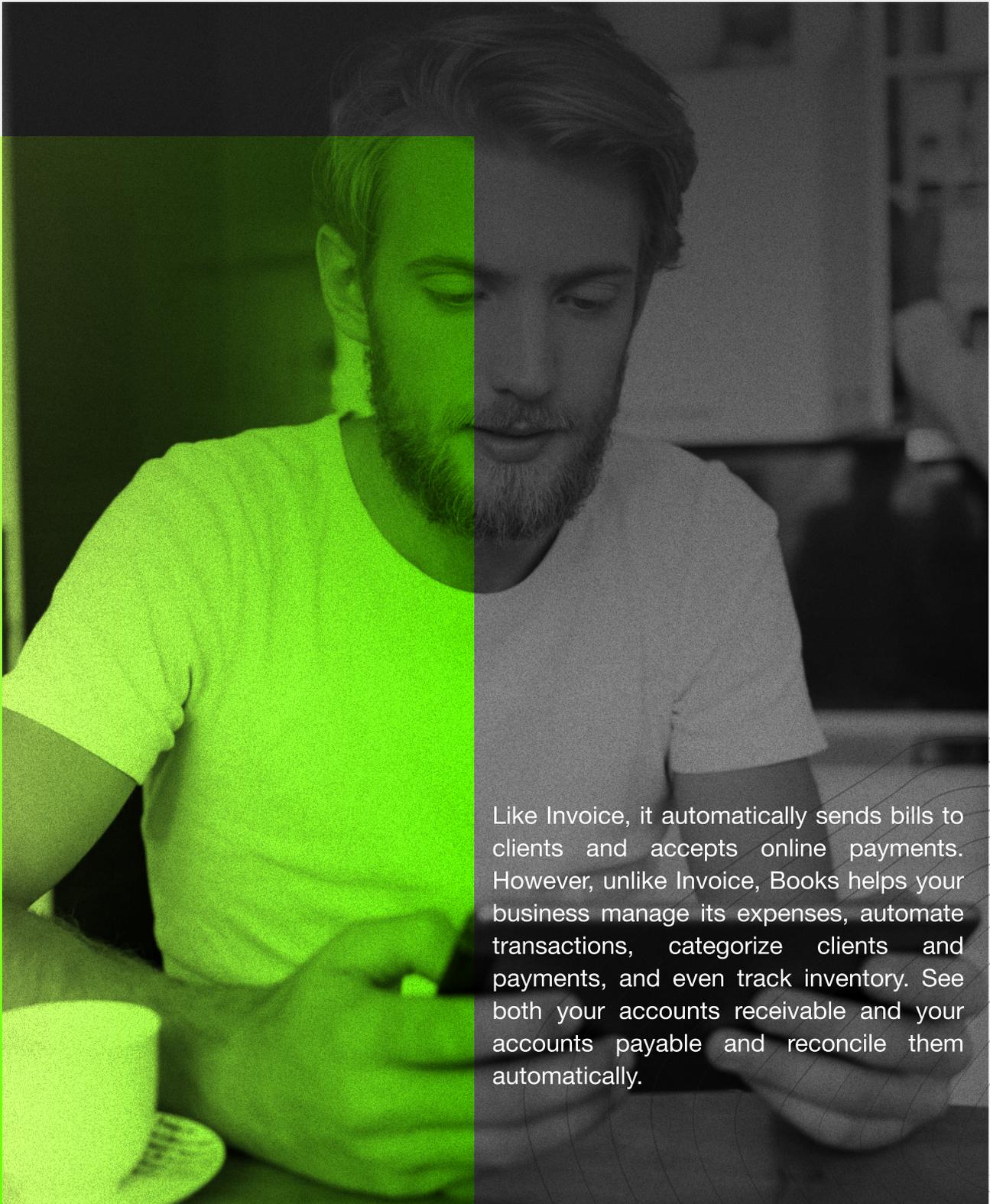
Zoho Invoice easily integrates with Zoho CRM so you can log and sync invoice transactions. In addition, integrate Invoice with Zoho Creator and create automatic invoices for all new records. Invoice also works directly with Zoho Analytics to give you richer insight into your business and its expenses. Don't worry about switching back and forth between different systems. Zoho will automatically keep all of your data and records connected and synced.

## Did you know?

**\$825 Billion:** The amount small businesses are owed in unpaid invoices, which averages to \$84,000 each.

# Zoho Books

Making Accounting  
Simpler



Like Invoice, it automatically sends bills to clients and accepts online payments. However, unlike Invoice, Books helps your business manage its expenses, automate transactions, categorize clients and payments, and even track inventory. See both your accounts receivable and your accounts payable and reconcile them automatically.

# Zoho Books is more comprehensive than Zoho Invoice.

No business owner enjoys the time it takes to balance the books. Increase efficiency and keep all of your data in the same place by integrating Books with other Zoho products.

Connect with Zoho CRM to sync vendors, track your finances with Zoho Analytics integration, and automate records with Zoho Creator.

You can also integrate Books with Zoho Inventory and Zoho Expense. With Inventory, you'll be the first to know when inventory is low so you can quickly send purchase orders directly to your vendors. Meanwhile, with Zoho Expense, you can upload receipts right to your account.

## Balance Your Books

Why have multiple accounting tools when you can have one? Zoho Books lets you view invoices, create price lists for vendors, track inventory, monitor estimates, accept payments, and keep compliant with taxes. Meanwhile, the Client Portal lets you easily keep track of the transactions between you and your customers.

## Manage Your Expenses

- Track and categorize your business's expenses
- Balance your books with real-time banking and cash flow updates
- Collaborate with clients using the Client Portal, a place where clients can make payments, leave feedback, and view estimates and quotes
- Know when inventory stocks are low and quickly send over purchase orders

## Did you know?

According to 40% of small business owners, bookkeeping is the worst part of owning a business.

# Zoho Subscriptions

Automating  
Payments & More



The entire process is automated. Subscriptions will send invoices automatically, reminding customers when payments are due, notifying clients when payments fail, handling refunds and discounts, and even keeping real-time metrics on your subscriptions.

# If you have recurring bills for long-term customers, Zoho Subscriptions makes it simple to regularly remind them of their upcoming payments.

## Syncing, Logging, & Reporting Data

When you use Zoho Subscriptions, all of your data is automatically recorded and available in Zoho Books. Easily review invoices, payments, credits, and other data influencing your bottomline. Meanwhile, manage your growing list of subscribers and other clients by integrating Subscriptions with Zoho CRM.

You'll always know who paid and who may have cancelled subscriptions.

## Apps That Keep Your Business Connected

- Support payments for customers both online and off
- Send scheduled invoices and one-time bills automatically
- Eliminate time spent on invoices, notifications, and follow-ups
- Record expenses, subscriptions, and bills in one convenient location

## Did you know?

65% of small businesses spend significant time chasing invoices.

# One Tool. Endless Possibilities. Discover Zoho.

One of the reasons Zoho has become the leading online tool in business is its ease of use. However, that doesn't mean you should go through this process alone. Although Zoho is a fast and easy solution to your tech needs, let GrowMore and our team of certified developers help the process run even smoother. We firmly believe in Zoho's ability to help your business grow. It can improve your workflow, develop custom apps, organize leads, and integrate software so that your business can more efficiently keep up with projects, clients, and internal affairs. No matter your need, Zoho has the solution.

# Popular Integrations

## > Zoho Suite

Easily share data between your Zoho applications. With dozens of tools in the Zoho suite, the possibilities are unlimited.

## > eSignature Tools

Make sealing the deal simpler with integrations between your Zoho CRM and your chosen eSignature tools.

## > Payment Gateways

Payments can be authorized and received quickly with a custom integration using Authorize.net, Stripe, and more.

## > VoIP

Make, receive, and record calls within Zoho CRM. Get reminders for upcoming calls and deliver personalized customer service.

## > QuickBooks

Simply sync up your QuickBooks data with Zoho. You can even migrate your data directly to Zoho Books.

## > Drip Campaigns

Stay at the top of your customers' minds. Zoho offers multiple integrations that keep you and your customers communicating.

## > Postal Methods

Organize your mailing methods using an integration between your Zoho CRM and your multiple marketing platforms.

## > Texting Apps (SMS)

Quickly get out in front of your customers using text messages. Remind them of calls, follow up on deals, and alert them to new offers.

# Help Your Business Grow with Zoho

Now that you've been introduced to Zoho and all of its capabilities, it is time you start exploring how Zoho can help your business rise above the competition. If you are ready to enhance customer relations, improve your marketing efforts, streamline your project management, and much more, we can help.

As an officially authorised and certified Zoho partner, we provide professional guidance as well as direct support so that you can get the most out of your technology investment. Get in touch with us today and transform your work using Zoho!



**Nikita Leiman**

Principal Consultant, CEO

✉ [contact@growmo.re](mailto:contact@growmo.re)

☎ +995 574 803 363



## Get In Touch

Find more information here

🌐 [growmo.re](http://growmo.re)

📍 Tbilisi, Georgia