

Supercad Trading LLC Case Study

How Supercad Trading LLC Optimized Operations with Zoho One for Seamless Cross-Department Integration

Overview

This case study presents Supercad Trading LLC, an engineering equipment distributor in Dubai, UAE, that faced operational challenges due to siloed systems and manual processes. By implementing Zoho One, Rays and Reach helped Supercad centralize their operations, integrate key business functions, and streamline processes across sales, operations, finance, and customer support. The result was improved coordination between departments, real-time data visibility, enhanced customer service, and a more efficient operation overall.

The case study clearly highlights the transformation that Supercad underwent after adopting Zoho One.

Executive Summary

- Client: Supercad Trading LLC
- Industry: Engineering Equipment Distribution
- Headquarters: Dubai, UAE

Supercad Trading LLC is a key supplier of engineering tools and solutions. They serve industries such as construction, manufacturing, and oil and gas, offering products like precision tools, machine accessories, and CAD/CAM software. Supercad is dedicated to providing high-quality products and innovative solutions to help businesses succeed. Their focus is on building lasting relationships and delivering value to their clients.

Problem Statement and Key Challenges

Supercad was experiencing several challenges in their operations. Their data management was siloed; the sales team relied mainly on Excel for managing leads and quotations, while the operations team used another set of spreadsheets and the finance team used Tally. This lack of integration between systems led to limited real-time visibility and coordination. As a result, the sales team had no access to inventory status or order progress, and the operations team lacked

insight into the sales pipeline.

The manual sales process required the team to create and share quotations manually and enter orders into Tally as a separate process. This process was time-consuming and sometimes led to delays in order fulfillment due to communication gaps between the sales, operations, and finance teams.

Customer support requests were handled through a shared email inbox, which made it difficult to track and resolve issues promptly. With no centralized system in place, the sales team had limited insight into ongoing support issues, and the support team struggled to manage customer concerns effectively.

Evaluation of the problem

Rays and Reach analyzed Supercad's reliance on Excel and Tally, identifying process gaps like siloed processes and a lack of real-time data. By mapping their challenges, the team recommended Zoho One to centralize operations, automate processes, and enhance communication between sales, operations, and finance.

Proposed Solutions

To address the challenges faced by Supercad, Rays and Reach implemented **Zoho One** as an integrated business operating system to streamline operations, ensure seamless coordination across departments, and provide a holistic view of all functions.

- 1. Sales and CRM Integration:** The sales team now uses Zoho CRM to manage and track all customer interactions and leads. Zoho CRM was customized by adding specific fields to the Leads, Accounts, Contacts, and Deals modules, ensuring that essential customer data is captured. Custom fields and mandatory steps were set at various stages of the sales pipeline to guarantee the collection of critical information before proceeding further. Additionally, the CRM was tailored with custom quotation templates, enabling the sales team to generate multiple versions of quotations directly from Zoho CRM with custom buttons. The system also automatically updates the quotation numbering, ensuring seamless version control. Once a quotation is accepted, it is automatically converted into a Sales Order in Zoho Inventory. Custom functions ensure that the original salesperson remains the owner of the sales order, creating complete accountability across departments. These integrations allow the sales team to track all sales activities and pipeline status in real time, with no need to switch between systems.

2. **Operations and Inventory Management:** Once a sales order is confirmed, the operations team is automatically notified via Zoho Books, where they can view all confirmed orders. This allows the operations team to manage inventory efficiently, package products, and prepare them for shipping. The integration between Zoho CRM, Zoho Books, and Zoho Inventory ensures real-time updates on inventory levels, reducing the risk of stock-outs and providing visibility into product availability for both the operations and sales teams. Furthermore, Zoho Inventory was customized to link Sales Orders to corresponding Purchase Orders (PO). When a Sales Order is created, the PO in Zoho Inventory is updated with the SO number for easy tracking. The PO approval process is automated through a custom workflow in Zoho CRM, which facilitates approvals and rejection prompts. The purchase receive feature in Zoho Inventory was configured to track received goods and automatically update inventory levels, promoting operational efficiency and avoiding delays in fulfillment.
3. **Finance Management and Invoicing:** For the finance team, Zoho Books provides an integrated solution to manage invoicing and financial records. Once a sales order is confirmed and shipped, the finance team can convert the order directly into an invoice in Zoho Books. Additionally, Zoho Books allows for real-time financial tracking, providing the finance team with an up-to-date view of pending and completed transactions and automatically generating invoices for sales orders. Sales teams also benefit from easy access to invoices with a simple click.
4. **Customer Support and Service Request Management:** To optimize customer service, Zoho Desk was implemented to manage customer support tickets and service requests. The shared email inbox is integrated with Zoho Desk, where incoming emails automatically generate support tickets. These tickets are then assigned to the relevant technicians for resolution. The system also ensures that SLAs are met by configuring time-based triggers for ticket responses and closures. Technicians can log their time and close tickets, providing full visibility into ticket status for both support and sales teams. This integration enables the sales team to track the progress of service requests, ensuring that customer issues are resolved promptly, and no requests are left unresolved. The integration with Zoho CRM also ensures that support tickets are linked to customer records, providing a comprehensive view of customer interactions across both sales and support.
5. **Project Management:** For managing customer projects and after-sales service requests, Zoho Projects was introduced to streamline task assignments and tracking. The team can

now easily create, assign, and monitor tasks related to customer projects, ensuring timely completion and clear communication among the project teams.

Implementation

Rays and Reach planned and executed the setup of Zoho One for Supercad over **3 months**. This included training, data migration, and system customization to ensure that Supercad's team was fully onboarded and able to use the system efficiently. The transition was completed smoothly.

Additional Services Provided:

- **Migration:** We migrated all existing data from Excel and Tally into Zoho Books and Zoho CRM to ensure a seamless transition without losing important customer and sales data.
- **Customization:** Zoho CRM and Zoho Books were customized to meet the unique needs of Supercad, including customized reporting, automation of workflows, and integration of modules like Zoho Inventory and Zoho Desk.

Results

- **Seamless Cross-Department Coordination:** Sales, operations, finance, and support teams now work in sync through a single integrated platform, significantly reducing delays and miscommunications.
- **Real-Time Data Visibility:** Zoho One's real-time data updates ensure that teams have access to accurate information always, enabling quick decision-making and reducing errors.
- **Streamlined Processes:** The automated processes between Zoho CRM, Zoho Books, Zoho Inventory, Zoho Desk, and Zoho Projects have improved operational efficiency, reducing manual efforts, and ensuring smoother business operations.
- **Improved Customer Experience:** With integrated support and service management, the company can respond to customer issues promptly, boosting customer satisfaction and loyalty.

Rays and Reach Solutions LLP



contact@raysandreach.com

www.raysandreach.com

For more on how Rays and Reach can help your business with Zoho solutions, please contact us.