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Cloud Analogy
Powered by AionOS

Zoho Creator & Zoho CRM Integration for Automated Financial Workflows

Client



Industry

Manufacturing

Technologies Used





Client Overview

1. A manufacturing company managing multiple financing and repayment workflows for its distributors
2. Relied heavily on Zoho CRM to track deal values, disbursements, and revenue
3. Needed a system that could automate complex fee calculations and provide accurate month-wise earnings
4. Wanted real-time visibility into outstanding balances, repayments, and principal clearance





Client's Requirements

The client needed a solution that could:

1. Automatically compute multiple fees on every loan/distribution disbursement:
 - Interest
 - Monitoring fees
 - Initiation fees
 - Late fees (where applicable)
2. Maintain updated earnings data inside Zoho CRM
3. Sync all financial entries between Zoho Creator and Zoho CRM without manual work
4. Automatically reconcile payments and clear principal balances when repayment is received





Our Solution (What We Delivered)

End-to-End Automated Financial Workflow (Zoho CRM + Zoho Creator)

One-click deal sync via custom **Create BTS** button

Automated disbursement entry & fee calculations

Interest, initiation, monitoring & late fees auto-computed

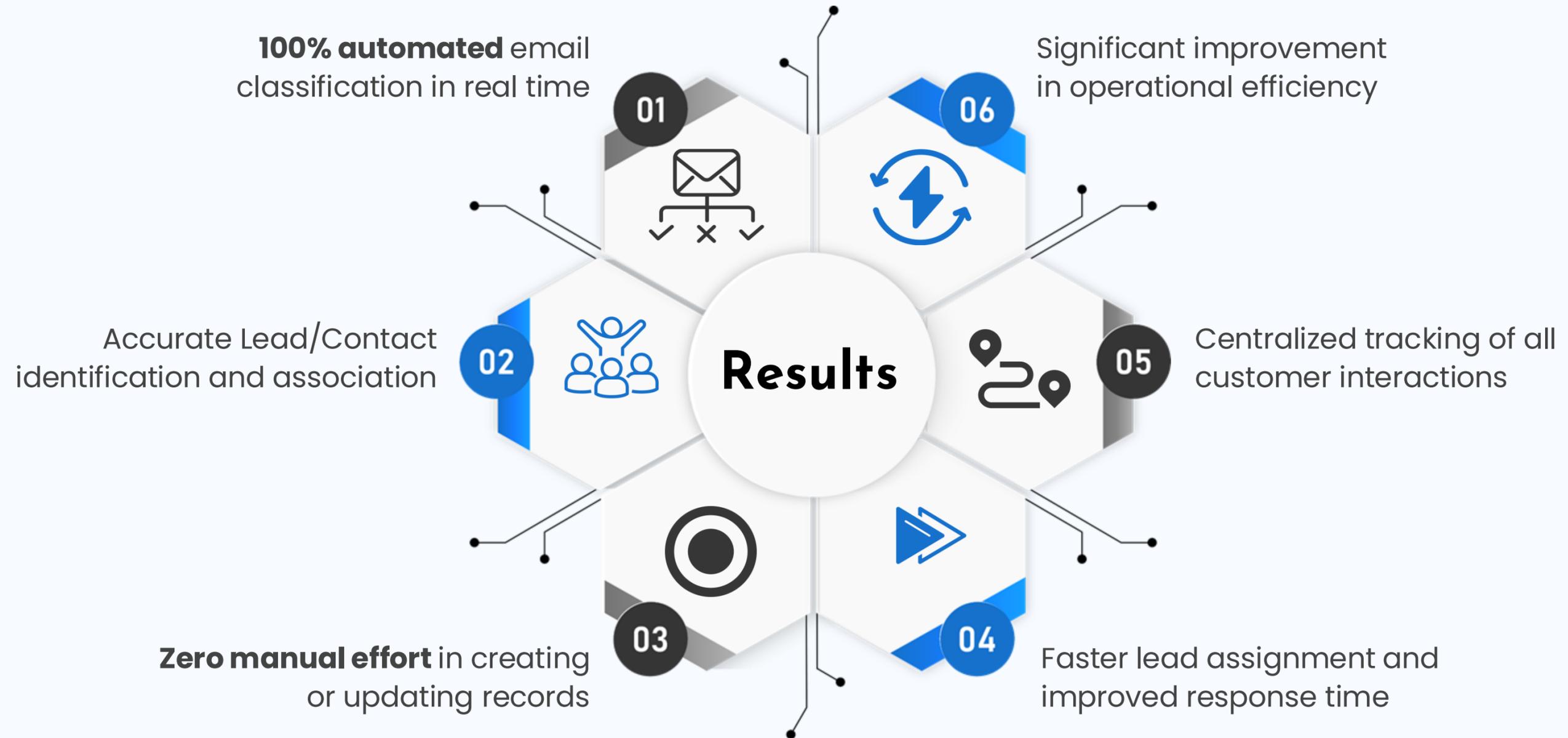
Monthly earnings auto-synced to CRM

Real-time visibility of disbursements & fees

Automated payment reconciliation & principal clearance



Results Achieved





Thank You