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**Cloud Analogy**  
Powered by A1onOS

**Zoho CRM**

# Address Auto-Populate & Representative Assignment in Zoho CRM

**Client**



**Industry**



**Technologies Used**





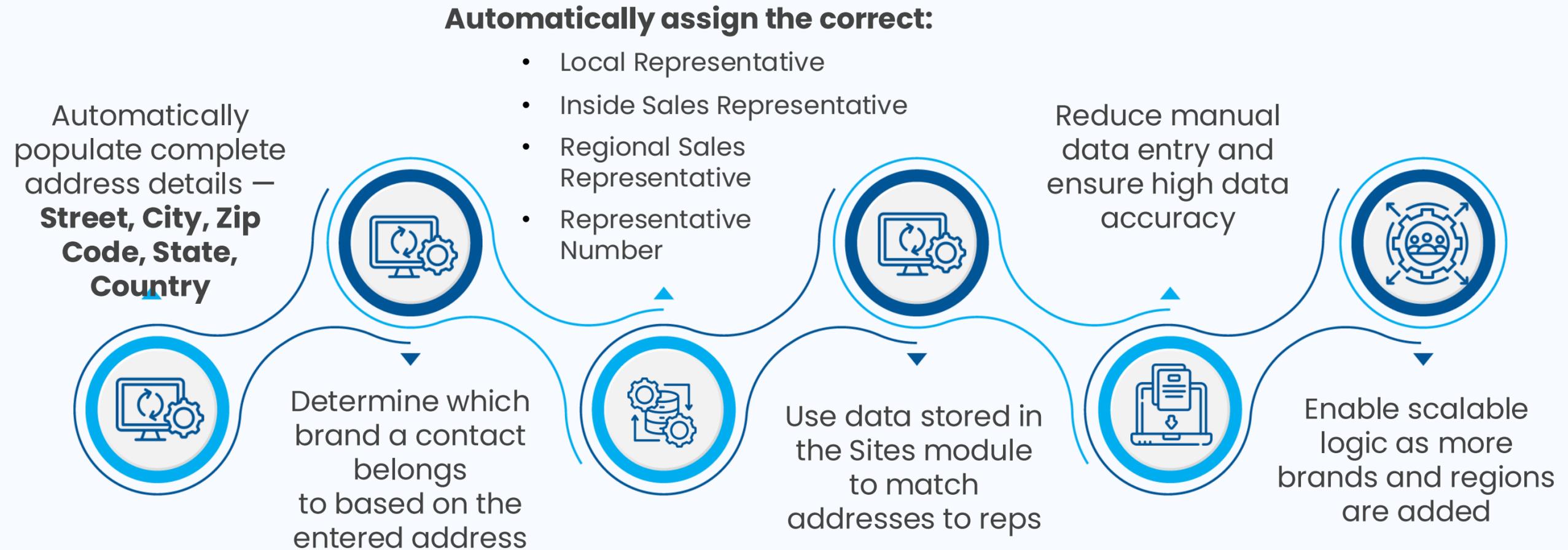
# Client Overview

1. A real-estate client managing thousands of property leads across multiple regions
2. Operates several growing brands under the same umbrella
3. Needed accurate address data for each new contact entering the CRM
4. Required a fully automated workflow to assign the correct local representative based on geographic location and brand
5. Needed seamless automation to eliminate manual address entry errors and rep assignment delays





# Client Requirements





# Our Solution

Cloud Analogy developed an intelligent, automated address and rep-assignment system inside Zoho CRM:



## Address Auto-Populate Button

- A custom button added beside address fields
- User enters a partial or full address
- System auto-fills Street, City, Zip Code, State, and Country instantly
- Built using geolocation-based APIs + Deluge scripting



## Sites Module Integration

- Sites mapped with address, brand & assigned reps
- Deluge logic matches contact location to the nearest site



## Brand Identification Logic

- Based on the detected location, the system determines which brand the contact should be mapped to
- Supports multiple active brands and easy brand expansion



## Automated Representative Assignment

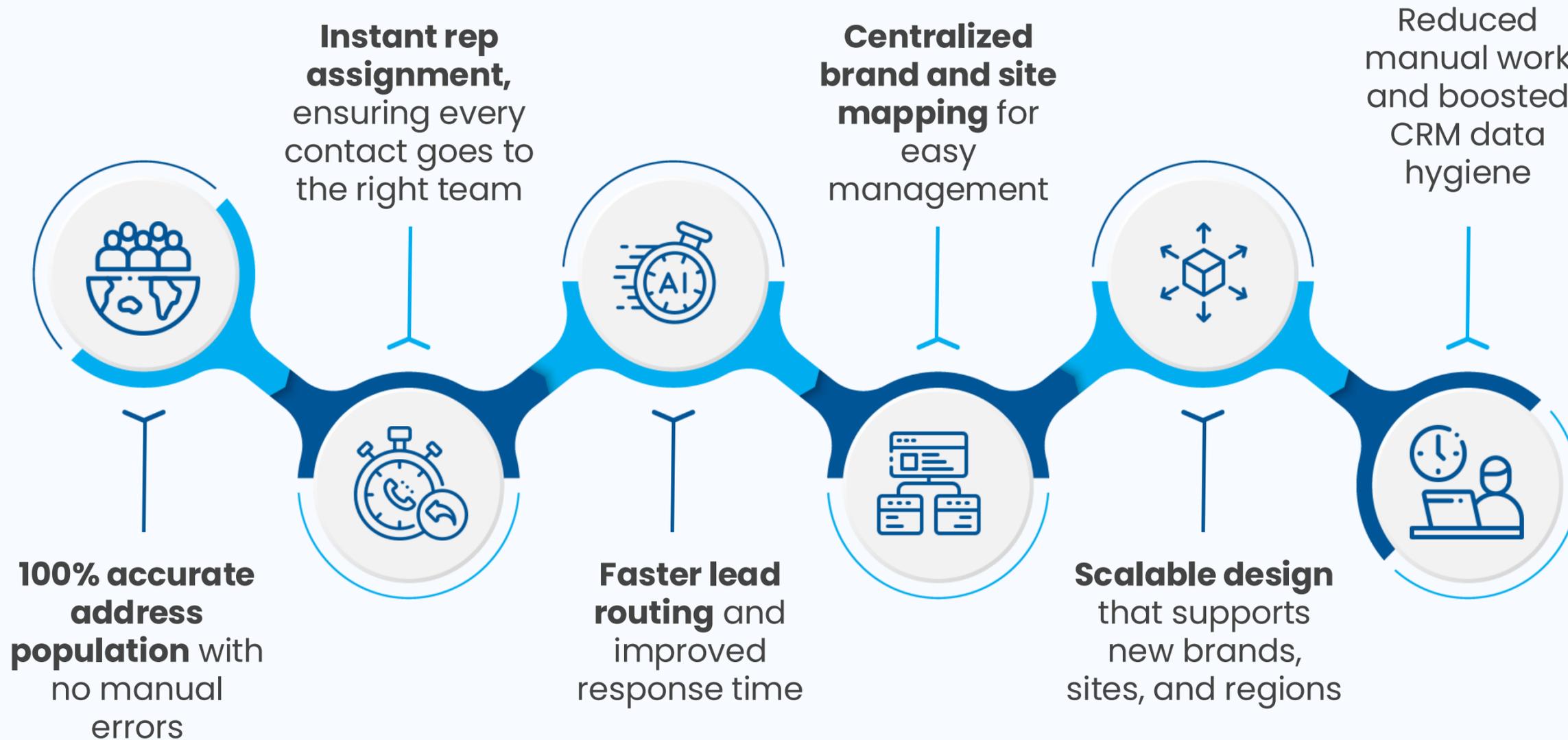
- Auto-assigns local, inside & regional reps with rep details
- Triggered automatically on contact save

This solution significantly improved accuracy, speed, and scalability for the client's CRM operations.



# Results Achieved

The CRM automation delivered key operational benefits:





# Thankyou

Cloud Analogy – Zoho CRM Customization & Automation Experts