Trigya Innovations

How Amitik Technologies Unified Sales, Inventory, and Services with Zoho

As Amitik Technologies scaled, operational complexity increased—multi-channel leads, long B2B sales cycles, distributed inventory, and service commitments were all managed through disconnected systems. This forced teams into manual follow-ups, spreadsheets, and reactive decision-making.

Trigya Innovations intervened with a unified Zoho ecosystem, connecting sales, inventory, finance, services, and execution into one integrated framework. The outcome wasn't just automation, but structured processes, real-time visibility, and a foundation built to scale.

Case Study of Amitik Technologies Private Limited

1. A Descriptive Title Card

Trigya Innovations strengthens Amitik Technologies' operational control with Zoho CRM, Zoho Books, Zoho Inventory, Zoho Creator, and Zoho Projects—enabling structured sales pipelines, real-time inventory visibility, and scalable service management.

2. Overview

Amitik Technologies Private Limited operates in a **B2B technology and services-driven environment**, where sales cycles involve lead qualification, deal tracking, inventory coordination, service commitments, and post-sale execution.

As the company scaled its operations, Amitik faced increasing complexity across lead acquisition, sales coordination, inventory tracking, AMC/service management, and financial

reconciliation. Disconnected tools and manual processes limited visibility across departments and slowed decision-making.

To address these gaps, **Trigya Innovations implemented a connected Zoho ecosystem**, aligning sales, inventory, finance, service operations, and project execution under a single operational framework.

3. Executive Summary

Amitik Technologies required a **centralized, process-driven system** to manage growing inbound leads, B2B deal lifecycles, inventory movement, service contracts, and financial operations—without increasing manual effort or operational risk.

Trigya Innovations deployed **Zoho CRM, Zoho Books, Zoho Inventory, Zoho Creator, and Zoho Projects**, creating a unified system that connected lead generation, deal management, inventory control, AMC tracking, and execution monitoring.

This implementation replaced fragmented workflows with **structured automation, real-time data sync, and cross-functional visibility**, enabling Amitik Technologies to operate with greater accuracy, accountability, and scalability.

4. Problem Statement and Key Challenges

As Amitik Technologies expanded its operations, several operational challenges became evident:

Key Challenges

- **Fragmented Lead & Deal Management**
  Leads from the website, Facebook Ads, and Google Ads were not centrally tracked, leading to delays, missed follow-ups, and inconsistent pipeline visibility.

- **Unstructured CRM Processes**
  Lack of standardized layouts, workflows, and approval paths resulted in inconsistent sales execution across teams.

- **Limited Inventory Visibility**
  Inventory spread across multiple stores lacked real-time tracking, affecting order fulfillment, dispatch accuracy, and vendor coordination.

- **Manual Vendor & Purchase Decisions**
  Purchase orders and vendor comparisons were handled manually, increasing the risk of cost inefficiencies and delays.

- **Inefficient AMC & Service Tracking**
  Service contracts, renewals, product expiry tracking, and customer notifications were not system-driven, increasing dependency on manual follow-ups.

- **Disconnected Finance Operations**
  Sales, inventory, and accounting systems were not fully synchronized, limiting financial visibility and slowing billing cycles.

5. Evaluation of the Problem

Trigya Innovations conducted a detailed assessment of Amitik Technologies' operational flow, focusing on:

- Lead capture and qualification processes
- Sales pipeline structure and approval dependencies
- Inventory movement across multiple locations
- Vendor procurement and PO decision workflows
- AMC lifecycle and service communication gaps
- Financial handoff between sales, inventory, and accounting

This evaluation highlighted the need for a deeply integrated system, rather than isolated application-level fixes—driving the decision to implement a Zoho One–aligned ecosystem tailored to Amitik's business model.

6. Proposed Solutions

Trigya Innovations designed and implemented a connected Zoho architecture aligned to Amitik Technologies' operational needs:

Zoho CRM

- Centralized lead capture from the website, Facebook Ads, and Google Ads
- Customized modules for Leads, Deals, Contacts, and Accounts

- Structured B2B Blueprint workflows to enforce sales stages
- Email templates and automated workflows for consistent follow-ups
- SalesIQ live chat integration for real-time customer engagement

Zoho Books

- End-to-end accounting setup with Chart of Accounts
- Opening balance configuration
- Customized sales and purchase workflows
- Automated reminders and emailers
- Quotation and estimate management

Zoho Inventory

- Multi-store inventory tracking
- Sales Order and Purchase Order management
- Packaging and dispatch tracking for operational accuracy

Zoho Creator (Custom Applications)

- Inventory Application with CRM integration
- Automated quote approval workflows
- Vendor comparison and auto PO logic
- Two-way sync with Zoho Books and Zoho Inventory
- AMC Management Application for service tracking, expiry alerts, and automated customer communication

Zoho Projects

- Task and project management
- User time tracking
- Actual vs budget performance visibility
- CRM integration for execution traceability

7. Implementation

Trigya Innovations executed the implementation through:

- Process mapping and module customization
- Data migration for leads and contacts
- Cross-application integrations
- Workflow and blueprint configuration
- User enablement and UAT support

The solution was rolled out with a **structured 90-day delivery plan**, followed by post go-live support to ensure adoption and stability.

8. Result

The Zoho implementation delivered measurable operational improvements for Amitik Technologies:

- Centralized visibility across sales, inventory, services, and finance
- Faster lead response and disciplined deal progression
- Accurate, real-time inventory and dispatch tracking
- Automated AMC reminders and service lifecycle management
- Reduced manual dependency in procurement and approvals
- Improved financial clarity through system-level synchronization

By consolidating operations into a single connected ecosystem, Amitik Technologies established a **scalable digital backbone** capable of supporting future growth without proportional increases in operational complexity.