



EVA Software Solutions



Case Study: Zoho Implementation for Sareguru Private Limited

1. Client Overview

Sareguru Private Limited is a growing organization operating in the **pest control industry**, providing pest management and related service solutions to customers. The organization manages customer information, service requests, technician assignments, service schedules, inventory, sales, and, billing activities.

To streamline these operations and improve coordination between different teams, **EVA Software Solutions** implemented an integrated Zoho ecosystem consisting of **Zoho CRM, Zoho Books, Zoho Inventory, and Zoho Technician App**.

2. Business Challenges

Before implementing the Zoho solutions, Sareguru required a more structured system to manage its day-to-day service and business operations.

Key challenges included:

- Difficulty in centrally managing customer and service-related data
- Manual tracking of service requests and customer follow-ups
- Challenges in assigning technicians to service tasks
- Manual management of service schedules and technician activities
- Limited visibility into technician-wise service status and task completion
- Difficulty in managing inventory and consumption of pest control chemicals and materials
- Manual coordination between sales, service, inventory, and accounting activities
- Need for better management of quotations, sales orders, invoices, payments, and vendor transactions
- Lack of a centralized system for monitoring overall business operations

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3. Objectives

The primary objectives of the implementation were to:

- Implement a centralized system for managing customers and service operations
- Streamline the pest control service lifecycle
- Improve technician assignment and service scheduling
- Enable better tracking of technician tasks and service completion
- Maintain accurate records of inventory and material consumption
- Automate and standardize sales and accounting processes
- Improve coordination between CRM, inventory, accounting, and field service operations
- Provide better visibility into business and operational data
- Train the client team to independently manage the implemented Zoho applications

4. Solution Implemented

EVA Software Solutions implemented a customized Zoho CRM, Inventory, Books and Creator tailored to Sareguru's business needs.

5. Key Features & Customization

The solution was configured around Sareguru's pest control service workflow and included the following key features:

Customer & Service Management

- Centralized customer database
- Service plan management

Technician Assignment & Scheduling

- Assigning service tasks to technicians

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- Scheduling customer visits
- Technician-wise task management
- Tracking scheduled, completed, and pending services

Inventory Management

- Management of pest control chemicals and other materials
- Stock quantity tracking
- Inventory adjustments
- Monitoring stock availability

Sales & Accounting Management

- Customer and vendor creation
- Quotation and Sales Order management
- Invoice generation
- Purchase Order and Bill management
- Vendor payment tracking
- Expense management
- Banking and accounting transactions

Training & Knowledge Transfer

Comprehensive training was provided to the Sareguru team covering:

- **Zoho CRM**
- **Zoho Books**
- **Zoho Inventory**
- **Zoho Technician App**

The training focused on practical business processes and helped the team understand how to perform their day-to-day activities using the implemented system.

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Reporting & Operational Visibility

The implemented applications provide centralized access to business and operational information, helping the organization monitor:

- Customer data
- Service status
- Technician activities
- Sales transactions
- Invoices and payments
- Purchase and vendor transactions

6. Results & Benefits

The Zoho implementation helped **Sareguru Private Limited** improve its overall operational efficiency and establish a more structured approach to managing pest control services.

Key benefits include:

- Centralized customer and service data across the organization
- Improved technician assignment and scheduling
- Better tracking of service tasks and completion status
- Streamlined sales, invoicing, purchasing, and payment processes
- Better coordination between CRM, field service, inventory, and accounting teams
- Reduced dependency on manual tracking and follow-ups
- Improved visibility into service and business operations
- Better control over customer, technician, inventory, and financial information

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7. Conclusion

The implementation of Zoho CRM, Zoho Books, Zoho Inventory, and Zoho Technician App enabled Sareguru Private Limited to establish a more centralized, structured, and efficient system for managing its pest control operations.

The solution streamlined the complete business workflow—from customer management and service scheduling to technician assignment, inventory tracking, sales, invoicing, purchasing, and accounting.

With the implementation and comprehensive training provided by EVA Software Solutions, Sareguru's team gained the necessary knowledge to effectively use the Zoho applications and manage their day-to-day operations through a unified digital platform.

Overall, the implementation provided Sareguru with a scalable and integrated business management ecosystem, improving operational visibility, service coordination, inventory control, and financial management.

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