

Case Study: Zoho Implementation for Eco-Safe Pest Management

1. Client Overview

Client Name: Eco-Safe Pest Management

Partner name: **EVA Software Solutions.**

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<https://www.evasoftwaresolutions.com/index.html>



EVA Software Solutions

Industry: Pest Control Management Services



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Implementation Partner: EVA Software Solutions

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Zoho Applications: Zoho Books

About Eco Safe

Eco Safe is a professional pest control service provider delivering pest management solutions to residential, commercial, and business customers. As the business continued to grow, managing quotations, invoices, customer transactions, payments, expenses, and financial reporting through conventional processes became increasingly challenging.

Eco Safe required a reliable cloud-based accounting platform that could simplify financial operations while providing better visibility into receivables, expenses, and overall business performance.

The Business Challenge

Before implementing Zoho Books, Eco Safe needed a more structured approach to managing its financial processes.

Key requirements included:

- Centralized customer and financial information
- Faster quotation and invoicing processes
- Better tracking of customer outstanding amounts
- Systematic recording of expenses
- Improved payment tracking
- Easy access to financial reports
- Reduction of manual accounting work
- Better visibility into the company's financial position

The Solution

EVA Software Solutions implemented Zoho Books for Eco Safe, configuring the system around the company's pest control business requirements.

The implementation focused on creating a structured accounting workflow covering:

Customer → Quotation → Invoice → Payment → Accounting & Reporting

The system provided Eco Safe with a centralized platform for managing its day-to-day financial transactions.

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Key Areas Implemented

Customer Management

- Customer master creation
- Customer contact information
- Customer transaction history
- Customer outstanding tracking

Quotation Management

- Preparation of quotations
- Professional quotation formats
- Conversion of approved quotations into invoices

Invoicing

- Customer invoice creation
- Invoice tracking
- Invoice status management
- Outstanding invoice monitoring

Payment Management

- Recording customer payments
- Payment allocation against invoices
- Outstanding receivable tracking

Expense Management

- Recording business expenses
- Expense categorization
- Vendor expense tracking

Financial Reporting

- Profit & Loss
- Balance Sheet
- Receivables
- Payables
- Sales reports
- Expense reports
- Tax-related reports

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Business Impact

With Zoho Books, Eco Safe gained a more structured and centralized financial management system.

Key improvements included:

- Better control over customer receivables
- Faster invoice generation
- Improved payment tracking
- Centralized financial data
- Reduced dependency on manual processes
- Easier access to financial reports
- Better visibility into business transactions
- Cloud-based access to accounting information

Conclusion

The implementation of **Zoho Books** helped Eco Safe establish a more organized accounting and financial management process suited to its growing pest control business.

EVA Software Solutions supported Eco Safe in configuring Zoho Books around its operational requirements and helped create a smoother and more structured financial workflow.

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