



EVA Software Solutions



# Case Study: Zoho Implementation for Orion

## 1. Client Overview

**Client Name:** Orion

**Industry:** Pest Control Management Services

**Implementation Partner:** EVA Software Solutions

**Zoho Applications:** Zoho CRM, Zoho Creator, Zoho Inventory, Zoho Books, Zoho Technician App

At Orion, effective pest management goes beyond treatment—it starts with the right strategy. The organization works closely with its clients to understand their unique pest management challenges, operating environments, and long-term requirements.

Orion focuses on developing tailored pest management strategies that emphasize **prevention, safety, sustainability, compliance, and measurable results**. Its services support different types of customers, ranging from homes and businesses to larger facilities.

To support these operations, Orion uses an integrated Zoho ecosystem consisting of **Zoho CRM, Zoho Creator, Zoho Inventory, Zoho Books, and Zoho Technician App**.

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## 2. Business Requirement

As pest management involves coordination between customer management, service planning, field technicians, inventory, and financial operations, Orion required structured digital processes to support its business activities.

The implementation was focused on creating a connected operating environment where customer information, service-related activities, technician operations, inventory, and financial processes could be managed through appropriate Zoho applications.

Key areas addressed through the Zoho ecosystem included:

- Centralized customer and business information
- Structured management of pest control service activities
- Technician assignment and field-service activities
- Management of operational processes through Zoho Creator
- Tracking of pest control materials and inventory
- Management of sales, invoicing, purchasing, and accounting

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- Improved coordination between customer-facing, operational, field-service, inventory, and finance teams
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### 3. Objectives

The primary objectives of the Zoho implementation were to:

- Establish a structured system for customer management
  - Organize pest control service-related processes
  - Improve coordination of technician activities and service execution
  - Provide a customized operational workflow through Zoho Creator
  - Maintain better control over inventory and materials
  - Streamline sales and accounting activities
  - Connect operational and financial processes across the Zoho ecosystem
  - Improve visibility into customer, service, technician, inventory, and financial information
  - Provide Orion's team with a practical system for managing day-to-day activities
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### 4. Solution Implemented

EVA Software Solutions implemented an integrated Zoho environment for Orion using **Zoho CRM, Zoho Creator, Zoho Inventory, Zoho Books, and Zoho Technician App.**

Each application supports a specific part of the business workflow:

#### Zoho CRM

Used for structured customer and relationship management, providing a centralized platform for managing customer information and service-related interactions.

#### Zoho Creator

Used to support customized business processes and operational workflows aligned with Orion's pest management requirements.

#### Zoho Inventory

Used for managing inventory and operational materials required for pest control activities.

#### Zoho Books

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Used for financial and accounting processes, including sales, purchases, invoicing, payments, and related accounting activities.

### **Zoho Technician App**

Used to support field technicians and service execution, helping organize technician activities and customer visits.

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## **5. Key Features & Customization**

### **Customer Management**

- Centralized customer information
- Structured customer records
- Service-related information management
- Better visibility into customer requirements and activities

### **Service & Operational Management**

- Structured pest management service workflows
- Management of service-related activities
- Customized operational processes through Zoho Creator
- Coordination between customer requirements and service execution

### **Technician & Field Service Management**

- Technician activity management
- Customer visit coordination
- Service assignment and execution support
- Technician-wise service activity tracking
- Field-service workflow through the Technician App

### **Inventory Management**

- Management of pest control materials
- Inventory tracking
- Stock management
- Operational inventory visibility

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## Sales & Accounting Management

- Customer and vendor management
- Sales process management
- Quotation and transaction management
- Invoice management
- Purchase management
- Payment tracking
- Expense and accounting management through Zoho Books

## Business Process Management

Zoho Creator provides Orion with a customized layer for business processes that require workflows beyond standard application functionality, helping align the system with Orion's operational requirements.

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## 6. Integrated Zoho Ecosystem

The implementation brings together multiple business functions into a connected environment:

**Customer Management → Service Operations → Technician Activities → Inventory → Sales & Accounting**

The combination of CRM, Creator, Inventory, Books, and the Technician App allows Orion to manage different stages of its operations through dedicated applications while maintaining a structured overall workflow.

This approach is aligned with the broader objective of moving customer, field-service, inventory, and financial activities into a more organized digital environment. The existing pest-control implementation reference similarly structured the solution around CRM, field operations, inventory, sales, and accounting.

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## 7. Training & Knowledge Transfer

Training and knowledge transfer are an important part of the implementation to help the Orion team understand and use the configured applications.

Training covers the relevant day-to-day processes across:

- Zoho CRM

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- Zoho Creator
- Zoho Inventory
- Zoho Books
- Zoho Technician App

The training focuses on practical business processes and application usage so that the team can manage their regular activities using the implemented Zoho environment.

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## 8. Results & Benefits

The integrated Zoho ecosystem provides Orion with a more structured approach to managing its pest management operations.

Key benefits include:

- Centralized customer information
- More structured service and operational processes
- Better coordination of technician activities
- Improved visibility into field-service operations
- Better control over inventory and operational materials
- Streamlined sales and accounting processes
- Improved coordination between operational and financial functions
- Better visibility into business information
- A customized workflow aligned with Orion's operational requirements

The overall approach supports Orion's consultative pest-management model by creating a structured digital foundation for customer management, service execution, field operations, inventory, and finance.

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## 9. Conclusion

The implementation of **Zoho CRM, Zoho Creator, Zoho Inventory, Zoho Books, and Zoho Technician App** provides Orion with an integrated platform for managing its pest management operations.

The solution brings together customer management, customized business workflows, technician activities, inventory, sales, and accounting into a structured digital ecosystem.

With the implementation and knowledge transfer, Orion has a unified technology environment to support its operational processes and manage its day-to-day business activities more systematically.

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