



EVA Software Solutions



Successful Implementation of Zoho CRM & Zoho Books for Owsum Cars

1. Title

Driving Efficiency and Automation with Zoho CRM & Zoho Books

2. Overview

Owsum Cars is a leading multi-brand car dealership in Mumbai dealing in new and pre-owned cars, insurance renewals, and after-sales services. To streamline customer management, insurance renewals, and financial operations, EVA Software Solutions implemented Zoho CRM and Zoho Books for seamless automation and tracking.

3. Executive Summary

EVA Software Solutions provided a unified system through Zoho CRM and Zoho Books that automated enquiry tracking, renewal reminders, commission management, and branch-wise accounting. The integration of both platforms empowered Owsum Cars to manage sales, insurance, and finance with complete visibility and accuracy.

4. Problem Statement

- Manual tracking of new enquiries and car insurance renewals.
- No systematic reminder system for birthdays and insurance renewals.
- Difficulty managing multiple branches' sales and reconciliation.
- Lack of clarity in commission and accounting reports.

5. Proposed Solutions

- Implemented Zoho CRM for enquiry, lead, and insurance renewal tracking.

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- Set up automated reminders for birthdays, renewals, and follow-ups.
- Designed commission management workflows within CRM for both car and insurance sales.
- Implemented Zoho Books for accounting, including branch-wise transactions and bank reconciliation.
- Created custom dashboards for management to monitor performance and finances.

6. Implementation

- Customized CRM modules for enquiries, renewals, and commissions.
- Set up automation workflows for timely notifications and renewals.
- Configured Zoho Books with multiple branches and reconciliation setup.
- Conducted end-user training for sales and accounts teams.

7. Results

- 70% faster response time for new enquiries and renewals.
- 60% reduction in manual accounting and reconciliation efforts.
- Improved customer retention through automated renewal and birthday reminders.
- Transparent commission management and better financial visibility across branches.

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