



Project Name – Namdev Finvest

Introduction

Namdev Finvest is an NBFC under the category of Non-deposit Investment and Credit Company. Mr Jitendra Tanwar took over Namdev Finvest as Promotor and started operations in 2013. Mr Jitendra is first generation entrepreneur of Namdev Finvest and started his career at a very young age by financing automobiles.

Namdev Finvest believes to continue improving the customer experience by streamlining processes, enhancing digitalisation and further tailoring financial services to customers' needs. Mr Jitendra understood the needs of the people, either big or small. It became his passion to fulfil the needs of people and whatever is done with passion, positive results are certain.

Namdev Finvest initiated financial support for Micro, Small, and Medium Enterprises (MSMEs) entrepreneurs, recognising their crucial role as major contributors to growth and employment in rural and semi-urban areas. This support enables them to build assets and enhance their quality of life. Our comprehensive range of products is tailored to meet the diverse needs of these vital economic segments.

Business Name

Namdev Finvest Private Limited

Company Profile

1. **Industry** - Finance
2. **Location** - Namdev Finvest Private Limited
"Namdev House"
Plot No. 21, Neer Sagar-A, Bhankrota, Jaipur, Rajasthan – 302026
3. **Email** - info@namfin.in

Problem Statements

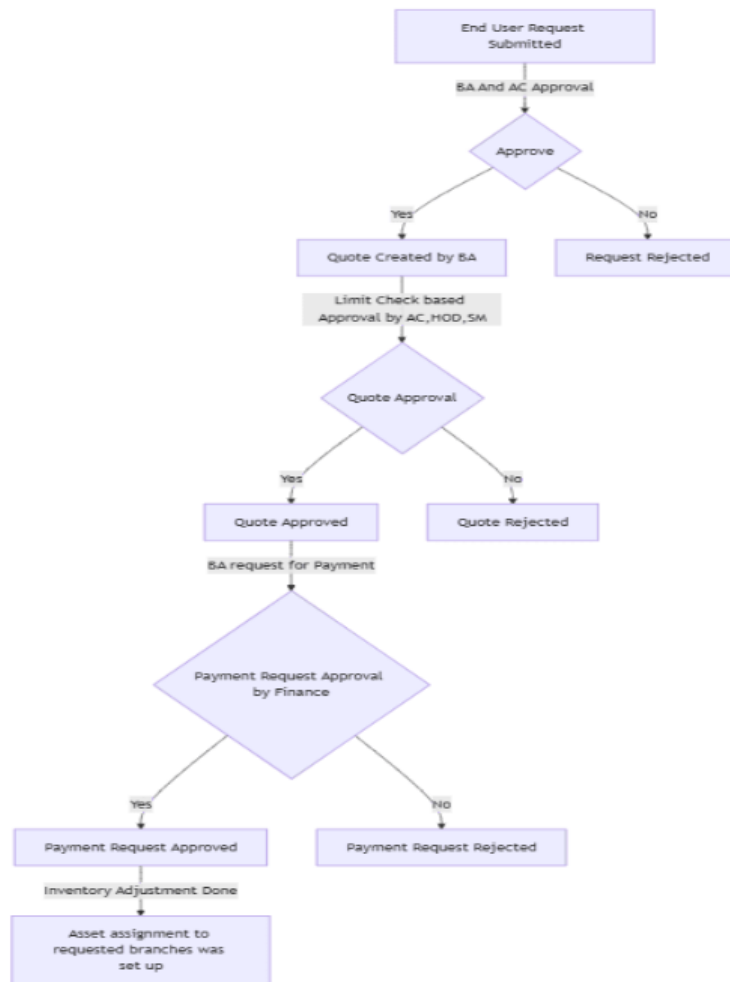
- **Lack of a Centralized Inventory Management System**
The organization currently has no proper mechanism to track assets and stationery across branches, leading to inconsistencies, misplacement, and difficulty in monitoring utilization.
- **Manual Procurement Processes**
Procurement activities are managed through Excel sheets, resulting in delays, errors, and limited visibility. The nurturing and lead-tracking process is also manual, making it inefficient and difficult to scale.
- **Decentralized Asset and Expense Request Management**
Requests for assets and expenses from multiple branches are not consolidated in a single system. This leads to fragmented communication, a lack of transparency, and delays in approval workflows.
- **Absence of Automated Reminder Workflows**
Critical administrative activities—such as branch inspections, rent renewals, and electricity agreement renewals—lack proper reminder mechanisms, increasing the risk of missed deadlines and operational disruptions.
- **Manual Finance Approval Workflows**
The finance team relies on manual processes to review and approve branch requests, causing bottlenecks, slower turnaround times, and difficulty in tracking the status of approvals.

Solution Offered

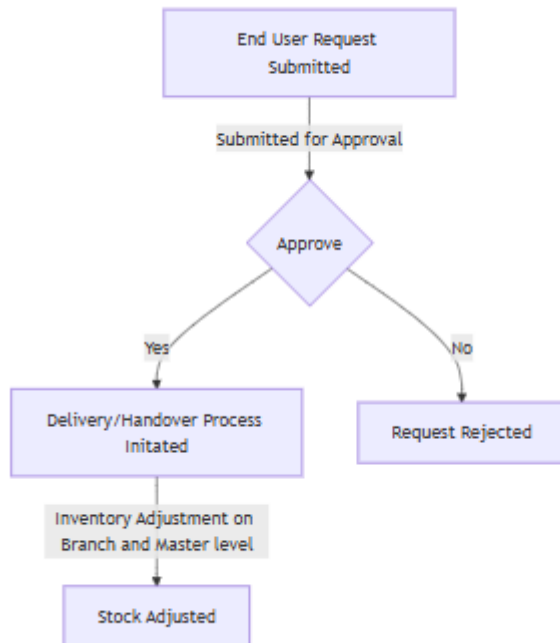
- **End-to-End Business Process Digitization**
Designed and implemented comprehensive workflows that aligned with the client's business requirements, addressing all key operational challenges and ensuring seamless process execution.
- **Customized Zoho Creator Deployment**
Tailored Zoho Creator modules to fit the organization's unique processes, enabling a scalable and flexible system that adapts to evolving business needs.
- **Automated Asset & Stationery Management Workflow**
Introduced a fully automated request and approval flow with a clearly defined approval hierarchy, improving visibility, accountability, and turnaround times for asset-related requests.
- **Procurement & Quotation Approval Automation**
Streamlined the procurement lifecycle by automating purchase requests, vendor quotation comparisons, and approval workflows based on company-defined financial thresholds and criteria.
- **Automated Admin Reminder System**
Implemented smart reminder workflows for critical administrative activities—such as branch inspections, rent renewals, and electricity agreement expiries—triggered based on system-recorded dates to ensure timely compliance.
- **Turnaround Time (TAT) Monitoring Framework**
Developed a TAT master within the system to track and flag breaches, enabling proactive monitoring and improving overall process efficiency.
- **Role-Based Dashboards & Custom Reports**
Built tailored dashboards and analytical reports aligned with role-specific permissions, providing stakeholders with real-time insights and enhancing data-driven decision-making.

Flow Chart

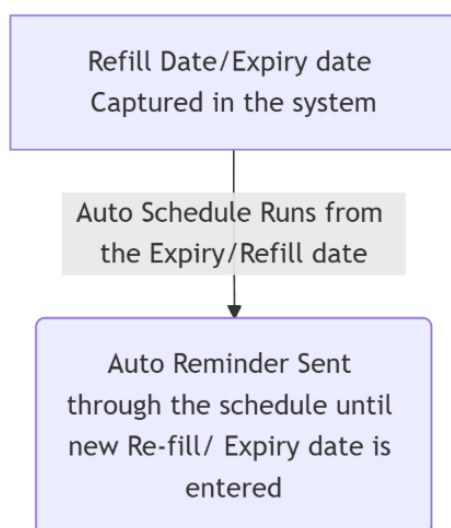
1)Asset Request



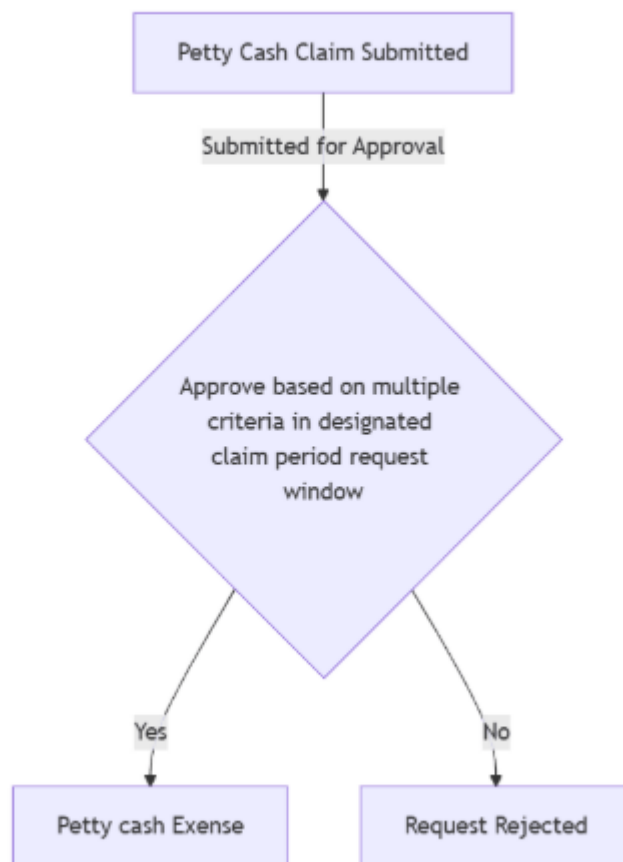
2)Stationary Request



3)Rent/Electricity/Fire Extinguisher Re-fill Reminder Workflow



4)Petty Cash Flow



Customer Feedback -

Namdev Finvest Pvt. Ltd.

5 Dec

★★★★★

Best solution provider with great technical experience. As development partner on time support and best developing team

Only you can see below reply until partner team review and publish it.

Reply from Apurva Singh · Just Now · [Edit](#)

Thank you so much for your kind words! We're glad to be your development partner and truly appreciate your trust. Our team is always here to support you and deliver the best.



Contact us : zoho@crmssparrow.com

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