# Project – LAMAR CERAMICS

## Introduction:

Lamar offers high quality External Porcelain Paving and Large format Porcelain Slab that are both functional and alethically pleasing. The Brand strives to be a leader in the industry, providing innovative solution to meet the evolving needs of the customer.

we supply material to business associates including builder merchants, fabricators, architects, designers, builders, and landscapers.

## Business Name:

**DAPTA OVERSEAS LLP**

## Company Profile:

Location: Station Road, Durgapura, Jaipur, Rajasthan, 302018

## Selection Criteria:

Zoho Books
Zoho Advanced Inventory

## Requirement:

1. **Inventory Management**

- An integrated inventory flow with minimum human intervention
  Sale Flow- Quote> Sales Order> Packing List> Delivery note> Sales Invoice.
  Purchase Flow- Order > Goods Receipt Note> Invoice
- Batch No. & Serial No. tracking
- Alternate unit of Measure e.g. Pcs & Sqmtr for Tile. (2 Pcs or 1.2 Sqmtr)
- Package concept e.g. Pcs, Pallet (1 Pallets has 40 pcs)
- Dispatch Planning / Delivery schedules
- Manage inventory at customer location (Consignment)
- Physical stock count (Batch wise & serial No.)
- Email automation for Quotation, Sales order, Delivery Note, Invoice etc.
- Stock Re-order level / Low stock warning.
- Stock reserve at Sales order level.
- Consignment stock transfer & tracking, invoicing.

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2. **Accounting & Financial Tracking Challenges**

- Automated Overdue follow-up / Account Statement - Reminders needs to setup
- Payable ageing - Via Reports
- VAT Accounting - Setup Taxes
- Automated Bank reconciliation - Training

3. **Need for an Integrated, Scalable System**

- CRM Integration - **N/A**

4. **Workflow / Roles & Rights/ Approval**

- There are mainly followings roles
    - Admin (Full rights)
    - Warehouse (Limited to warehouse operation)
    - Sales (Limited to sales operation)
    - Accounts- (Other than Warehouse & Sales access)
    - Approver-
    - MIS (View rights for all master & transaction)

- There will always be an approval workflow for all the transaction except quotation

## Solution Offered:

## ZOHO Books – Elite version

## The Technical Solution: Automated Calculation Logic

To minimize human intervention and eliminate manual errors, a Deluge script was deployed across all relevant modules (Estimates, Sales Orders, Invoices, Purchase Orders, Bills, Purchase Receives, and Packages).

## How the Logic Works:

1. **Data Retrieval**: The script fetches the item details, including the category and custom fields configured for that item, such as cf_area_per_pcs (area per piece) and cf_no_of_pcs_per_pallet (pieces per pallet).

2. **Conditional Execution**: The calculation triggers specifically for items categorized as "Porcelain Paving" or "Porcelain Slabs".

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3. **Automated Computation**:

The system automatically executes calculations for porcelain items:

**Total Pieces:** `Quantity / Area Per Piece`

**Number of Pallets:** `ceil(Total Pieces / Pieces Per Pallet)`

These values are pushed to custom fields, ensuring all documentation is accurate without manual calculation.

4. **Update Module**: The calculated values are pushed back into the respective transaction's custom fields (cf_total_pcs and cf_no_of_pallets), ensuring that documentation like the Invoice or Packing List automatically reflects the necessary logistics data.

## Implementation Impact :

- **Operational Efficiency**: By automating these calculations, the warehouse and sales teams no longer need to perform manual conversions, ensuring that delivery planning and dispatch scheduling are accurate.
- **Inventory Accuracy**: The logic supports the company's requirement for managing alternate units of measure (e.g., Pcs vs. Sqmtr) and package concepts, which are vital for shipping high-value porcelain products.
- **Scalability**: Applying this same logic consistently across all modules—from initial quotes to final package lists—creates a seamless, integrated inventory flow that aligns with the "Elite" version of Zoho Books offered to the client.

## Workflow Automation:

- **Transactional Flow**: The system enforces a defined path: Quotation → Sales Order → Packing List → Delivery Note → Sales Invoice.
- **Approval Workflow**: To maintain control, all transactions are subject to a mandatory approval workflow before processing.
- **Email Automation**: Automated email notifications are configured for all modules to facilitate communication for Quotations, Sales Orders, Delivery Notes, and Invoices, streamlining the customer experience.

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# Marketing Sample Request:

To streamline the sample request process, we created a **custom module named "Marketing"** in Zoho Books along with a **web form** for customers.

**Business Requirement:**

Customers who require product display samples should be able to submit their requests online without manual intervention. The business also required a structured approval workflow with complete request tracking and invoice linkage.

**Solution Implemented:**

- Created a **Marketing** custom module in Zoho Books to manage all sample requests.
- Developed a **web form** that customers can access through a shared link.
- When a customer submits the form:
  - A **unique Request ID** is automatically generated.
  - The request is stored in the Marketing custom module.
- Once the request is **approved**:
  - The sample is dispatched to the customer.
  - A corresponding **Invoice** is created.
  - The approved Marketing request is automatically linked to the Invoice through the **Related List**, providing complete traceability between the request and the invoice.

- Implemented notifications and status updates for each stage of the process:
  - Request Submitted
  - Request Admitted
  - Request Approved
  - Request Rejected

**Business Benefits :**

- Eliminates manual tracking of sample requests.
- Provides a centralized approval process with complete visibility.
- Ensures every approved sample request is linked to its corresponding invoice.
- Improves customer communication through timely notifications.
- Enables end-to-end tracking of the request lifecycle from submission to sample dispatch and invoicing.

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## Custom Templates:

1) Quotation
2) Sales Order
3) Invoice
4) Pick list/ Packing list
5) Shipment Note/ Delivery Note
6) Purchase Order
7) Bills
8) Purchase Receives
9)Transfer Order

## Impact Summary:

- **Streamlined Logistics**: Warehouse operations are supported by accurate pick lists and delivery notes that clearly display pallet and piece requirements.
- **Scalability**: The implementation allows the business to handle high volumes of inventory data without increasing manual overhead.
- **Professional Documentation**: Customized templates for invoices and delivery notes ensure consistent branding and clear communication of logistics details to clients.

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