



ZOHO CRM PRODUCTION PROCESS

ZOHO CRM

Developed for a Leading Custom Cycling
Apparel Brand

Presented By
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CLIENT & PROJECT OVERVIEW

Custom cycling apparel brand needed a system to manage complex order fulfillment.

Created Time	Deal Number	Deal Name	Stage	Deal Owner	Account Manager	Concept Artist	Net Amount	Team Name
Oct 23, 2025 08:54 PM	11131413	Deal 1	START Form Received	Usama Ahmed		Elie Cycling		Team For Multi Style T
Oct 23, 2025 12:57 AM	11131412	Usama New Test	Send START Form	Usama Ahmed	Elie Cycling	Corbett Russet		PWR Racing
Oct 22, 2025 08:02 PM	11131411	Deal For multi Style Test	New Potential 10	Usama Ahmed				Team For Multi Style T
Oct 22, 2025 04:48 PM	11131410	Full Final Deal	Create START Form	Usama Ahmed				Full Final Team
Oct 22, 2025 03:50 PM	11131409	final Deal	Create START Form	Usama Ahmed				Final Test
Oct 22, 2025 01:56 PM	11131408	Test Deal	Create START Form	Usama Ahmed		Corbett Russet		New Test Team
Oct 16, 2025 01:16 AM	11131405	Test Deal	Create START Form	Usama Ahmed	Elie Cycling	Usama Ahmed		uSama test for i2d
Oct 16, 2025 02:03 AM	11131407	Test NGC Deal 2	Create START Form	Usama Ahmed				Test NGC Team
Oct 16, 2025 02:01 AM	11131406	Test Zoho Flow Deal	Create START Form	Usama Ahmed				Test NGC Team
Sep 30, 2025 06:12 AM	11131404	United Cycling 26 Womens Spring	START Form Received	Brent Garrigus	Jay Thomas	Frida Guerrero		
Sep 29, 2025 10:52 PM	11131403	Viejos Cycling Fall 2025	Team Work Open	Bill Marshall	Kevin Barak	Frida Guerrero		
Sep 27, 2025 01:12 AM	11131402	SDEC	SCM	Brent Smith	Brent Smith	Alexa Navarro		
Sep 26, 2025 06:59 PM	11131398	WNR Racing Re-Order	START Form Received	Jay Thomas	Kevin Barak			
Sep 27, 2025 12:37 AM	11131401	True Grit Racing (Spring 2026)	Potential 10	Bill Marshall	Bill Marshall			
Sep 27, 2025 12:29 AM	11131400	Big Wheel Tours (Spring 2026)	Potential 10	Bill Marshall	Bill Marshall			
Sep 27, 2025 12:23 AM	11131399	Expeditors (Spring 2026)	Potential 10	Bill Marshall	Bill Marshall			
Sep 26, 2025 01:50 AM	11131397	Magic City Rollers (Spring 2026)	Create START Form	Bill Marshall	Bill Marshall			Sample New company
Sep 26, 2025 12:47 AM	11131396	Team Jessup Auto Plaza (Spring 2026)	New Potential 10	Bill Marshall	Bill Marshall			
Sep 25, 2025 11:14 PM	11131395	Plaza Riders (Spring 2026)	New Potential 10	Bill Marshall	Kevin Barak			
Sep 25, 2025 10:51 PM	11131394	Nuan (Spring 2026)	New Potential 10	Bill Marshall	Bill Marshall			

Vision

To automate the entire Sales-to-Production-to-Invoicing process. * Manage a 15-step Production Pipeline. * Integrate External File Uploads (WorkDrive). * Automate Invoicing & Deposits (Zoho Books). * Enable bidirectional data exchange (Zoho Creator).

KEY CHALLENGES

* Manual, Multi-Step Tracking: Over 15 disconnected production stages (Printing, Sewing, etc.) were tracked manually. * High Data Entry Errors: New records had to be manually created for every stage transition. * Disorganized Files: Design and order files were scattered across different platforms. * Slow Billing: Manual invoicing delayed revenue collection.

MY SOLUTION

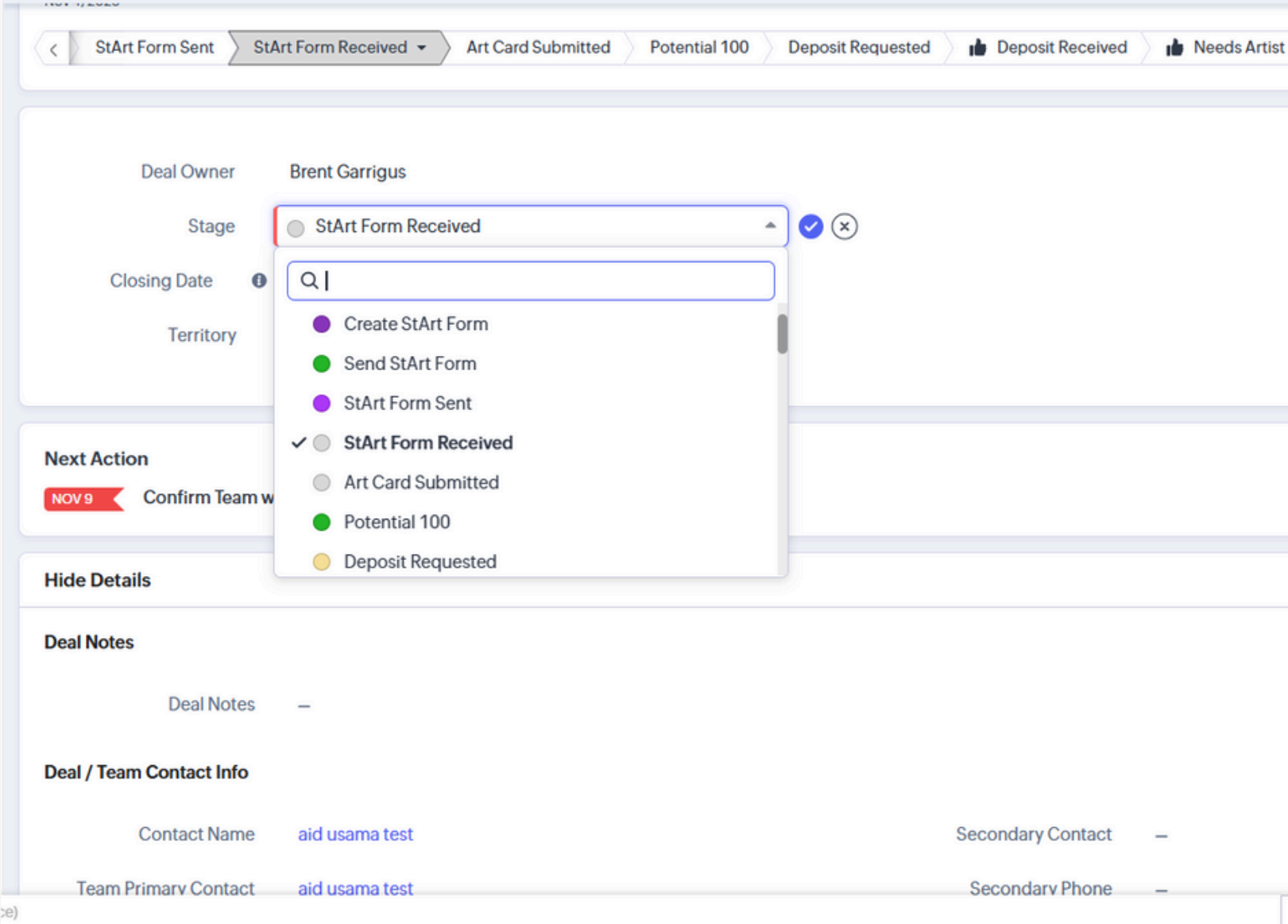
Built a Unified Zoho Ecosystem using advanced Deluge scripting and CRM Workflows. The solution uses a Lead Blueprint to qualify orders and Deal Dropdown Logic to drive subsequent production automation.

KEY FEATURES

* Lead Blueprint: Enforced standardization for lead qualification and conversion to a Deal. * Workflow Automation: Deal status changes (via Dropdown) trigger Deluge scripts to auto-create 15+ subsequent production records. * Seamless Tool Integration: Connected CRM with WorkDrive, Creator, and Books.

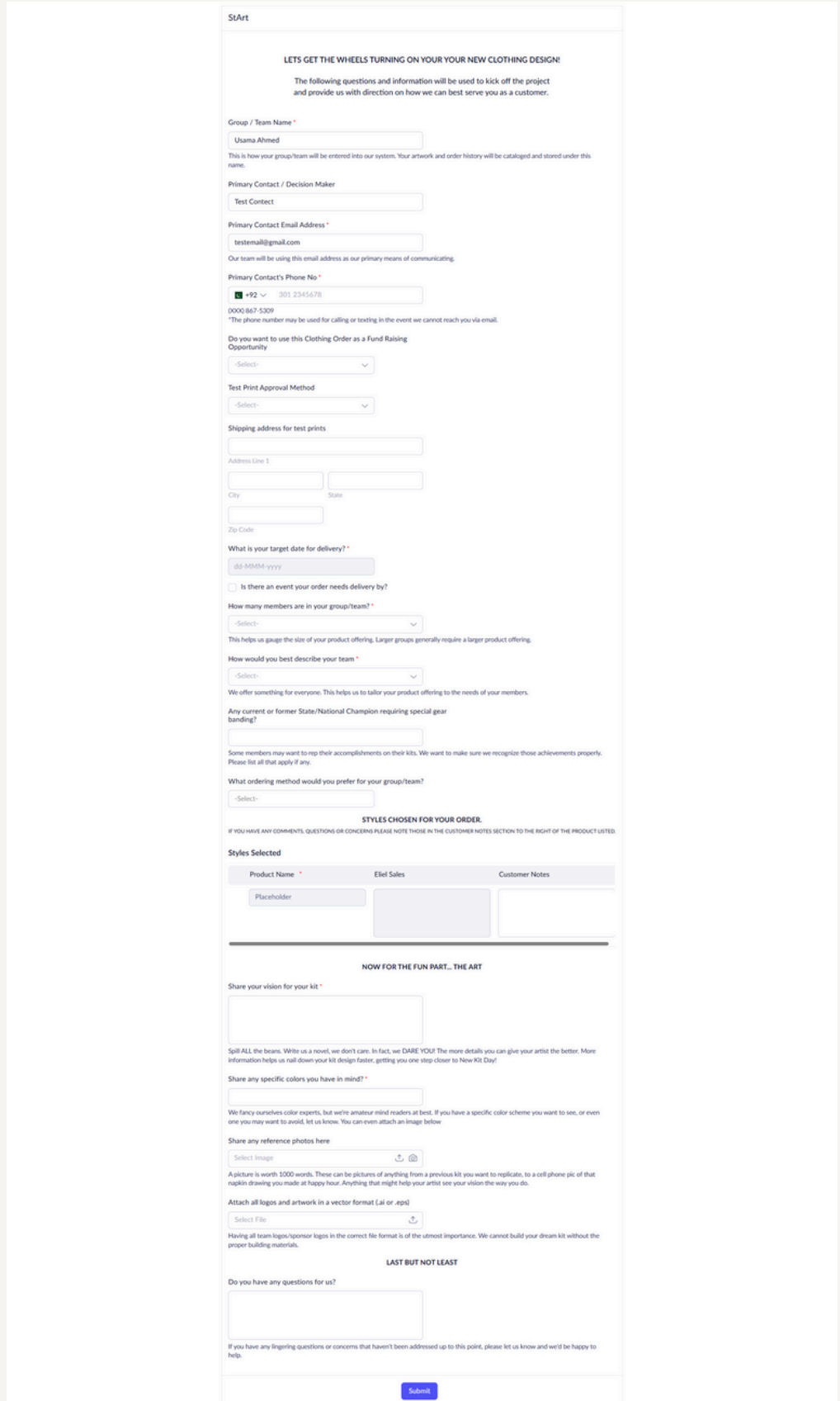
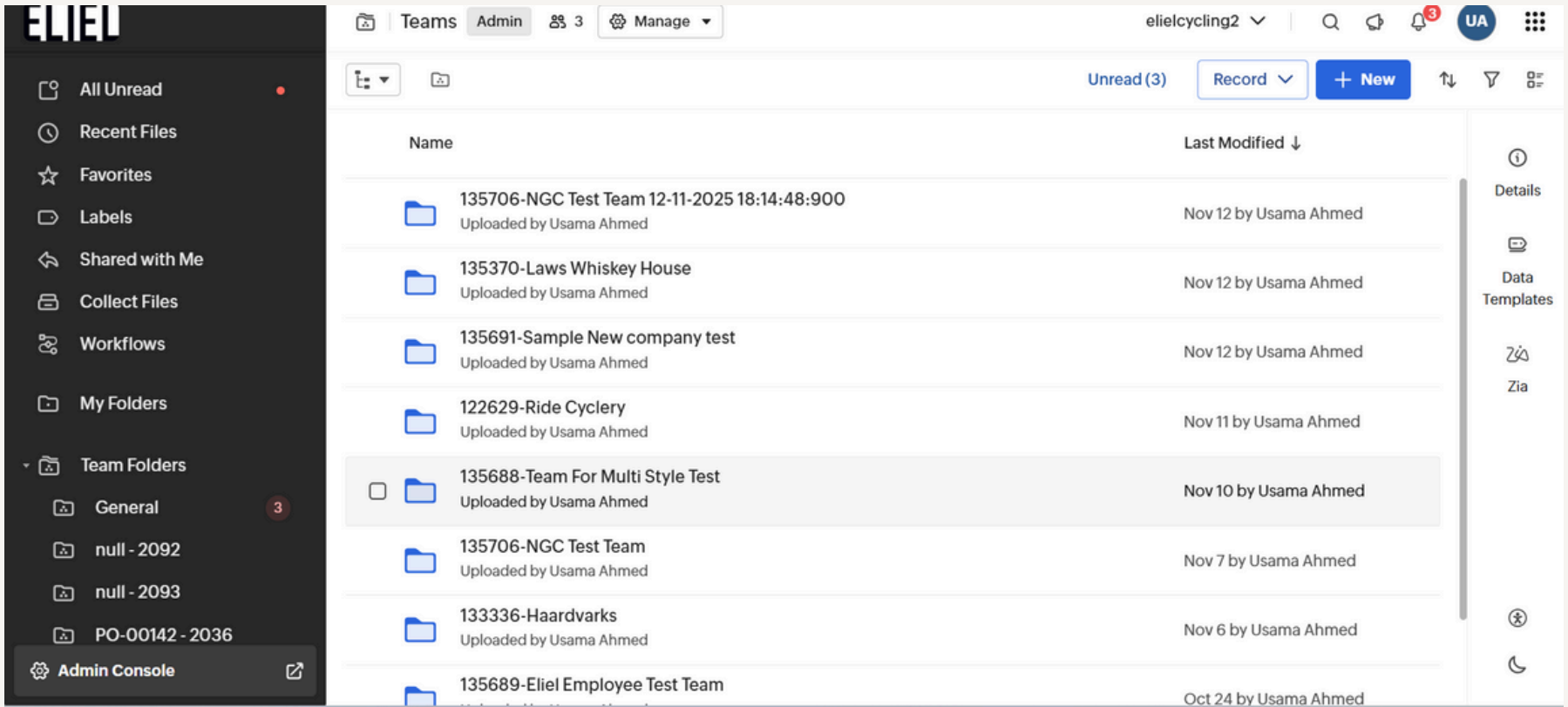
PRODUCTION PIPELINE AUTOMATION

* 15+ Custom Modules: The production flow is managed by a series of custom modules (e.g., Production Recs, Preflight Recs, Sewing Recs, etc.). * Deal Dropdown as Trigger: Deal status is updated via a Dropdown Field. This change triggers Workflows which run Deluge functions to auto-create the next stage record in the production pipeline. * Zero Manual Data Transfer: Deluge scripts ensure data is accurately carried forward from the Deal to the new production module record. * Final Bifurcation: The final stage routes the record to either EC Shipping Recs or Warehousing Recs based on selection.



WORKDRIVE & CREATOR INTEGRATION

* Automated Folder Structure: When the Deal's Dropdown status is updated to initiate the process, a Workflow triggers Deluge to auto-create the necessary folder structure in WorkDrive. * External Upload Portal: Client uses a simple link to upload design files directly into the correct WorkDrive folder. * Zoho Creator for Data: When the Deal's Dropdown status is updated to send the form, a Zoho Creator Form Link is provided. The form is pre-filled with CRM data, and the user's submissions automatically update the original CRM Deal record.



FINANCE & PRE-PRODUCTION FLOW

* Zoho Books Integration: When the Start Recs module record reaches the 'Send Dep Req' stage, a Workflow automatically integrates with Zoho Books to: 1. Create/Update the Contact. 2. Create/Update the Invoice with the amount fetched from Start Recs. * Pre-Production Stages: A dedicated workflow manages modules like Initial Concept Recs, Concept Dev Recs, and the final Purchase Order Recs.

The screenshot displays the Zoho CRM interface for a record in the 'StArt Recs' module. The record ID is 00056. The record is currently in the 'Complete' status. The interface includes a sidebar with various modules, a main record view with tabs for Overview and Timeline, and a dropdown menu for the Status field.

Record Details:

- StArt Recs Owner: Brent Garrigus
- Email: ismailtechnical000@gmail.com
- StArt Recs Name: 00056
- Deal Name: Test Deal
- Status: Complete
- Pre Prod Recs: -None-
- Notes: StArt Rec Notes, Dep Req Sent, Complete
- Team and Contact Info: Team Name: Sample New company test, Primary Contact Name: aid usama test

Related List: Notes, Connected Records, Attachments, Emails, Open Activities, Closed Activities, Add Related List

Links: No Links Found, Add Link

StArt Recs Information:

StArt Recs Owner	Brent Garrigus
Art Deposit Required	-
Art Deposit Amount	-
Currency	USD
Exchange Rate	1

IMPACT & OUTCOME

* 100% Data Integrity: Errors eliminated by automated data transfer across all 15+ steps. * Faster Revenue Cycle: Timely, automated invoicing and deposit requests via Zoho Books. * Full Visibility: Management tracks every order in real-time across the entire production pipeline. * Scalable & Standardized: Blueprint enforces a robust, repeatable process for future growth.

TOOLS & SKILLS USED

- Zoho CRM
- Deluge scripting
- Zoho Books
- Zoho Workdrive
- API Integration
- Custom buttons, forms, subforms
- Automation and business logic design

LET'S WORK TOGETHER

USAMA AHMED

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LinkedIn , Upwork

“Helping businesses automate operations with smart Zoho solutions.”