

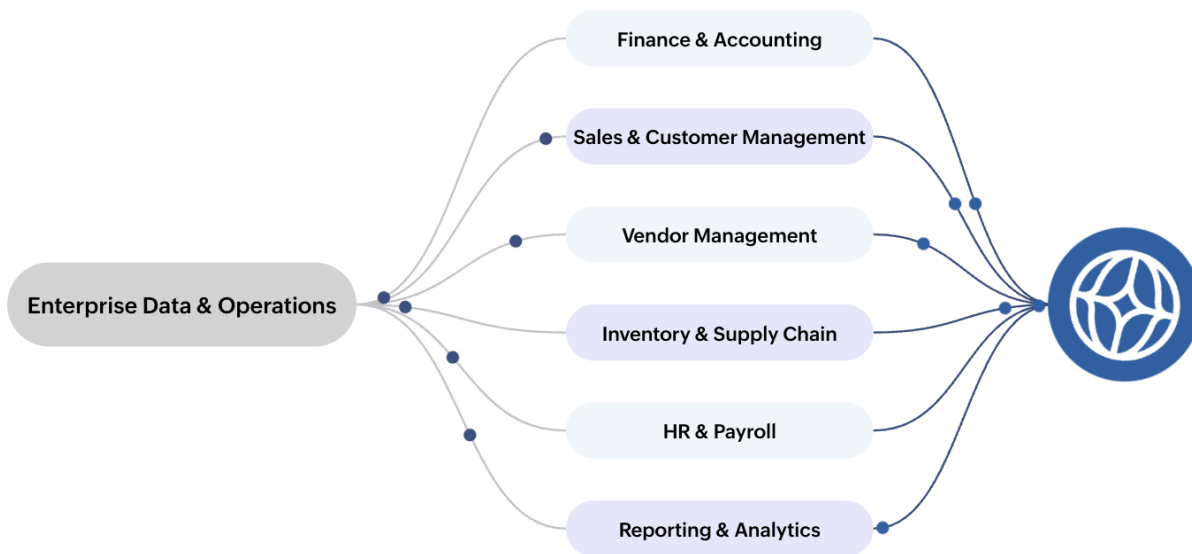


TECHSAGA × IPSA GROUP

Case Study: Zoho ERP Transformation for Manufacturing, Sales & Fulfilment

Connecting field operations, sales, order management, packaging, shipping, invoicing, supply chain, manufacturing, bill of materials, and inventory through one governed operating model.

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CASE STUDY | ZOHU IMPLEMENTATION FOR - IPSA GROUP (ARCHITECTURAL HARDWARE MANUFACTURING & DISTRIBUTION)

Zoho ERP Implementation Scope

From fragmented operational hand-offs to a controlled, automated ERP workflow designed for day-to-day execution and management visibility.

USED SOLUTIONS STACK

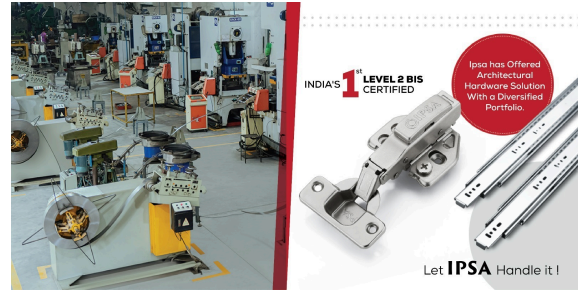
Zoho ERP	Deluge Custom Functions	Zoho Analytics
Workflow & Approvals	Email / WhatsApp	Manufacturing & Inventory

INSPIRED FOR INNOVATION



01 Client Context & Transformation Scope

IPSA Group is an architectural hardware manufacturing business serving architects, builders, contractors, dealers and distributors with products designed around durability, precision, performance and contemporary aesthetics. Its operating model requires the customer-facing organisation, fulfilment teams and production line to work from the same business information.



The ERP transformation therefore had two connected priorities:

Priority	Business Scope	Transformation Intent
1. Customer & Commercial Operations	Field service → Sales → Order Management → Packaging → Invoicing → Shipment → Supply Chain → Customer (End User, Dealers & Distributors)	Reduce hand-offs, control transactions, and create one operational flow from demand to fulfilment.
2. Manufacturing & Inventory Operations	Manufacturing Order → Bill of Materials → Supplier / Raw Materials → Production → Finished Goods → Managed Inventory	Connect production activity and stock visibility to the wider commercial and fulfilment process.

What This Existing Case Study Demonstrates

The implemented environment went beyond basic configuration. Techsaga built users, roles, permissions, and master data; automated package-to-invoice and invoice-to-shipment processing; introduced validations and approval gates; customised customer communication and invoice documents; and connected Zoho ERP with Zoho Analytics for embedded reporting.

Control / Capability	Implemented Example
Transaction control	Credit-limit validation, Sales Order lock, zero-amount invoice block, and duplicate-invoice checks.
Process automation	Bulk Package → Invoice automation and Invoice → Shipment automation through Deluge custom functions.
Data continuity	Price, discount, and custom-field values are inherited across related transactions instead of being re-entered.
Governance	Approval flows on Sales Orders and Invoices before downstream processing.
Communication	Separate Email and WhatsApp templates for Sales Order and Invoice events.
Reporting	Scheduled Zoho Analytics sync, custom reporting tables, dashboards, and embedded ERP visibility.

Transformation principle

Connect the operating model first. Automate the repetitive work second. Put business controls at every point where transaction quality matters.

02 Future-State Zoho ERP Architecture

Techsaga structured the Zoho ERP as a connected operating environment rather than a collection of isolated modules. Shared master data, role-based access, approvals, and business rules sit above two linked execution streams: customer/commercial operations and manufacturing/inventory operations.

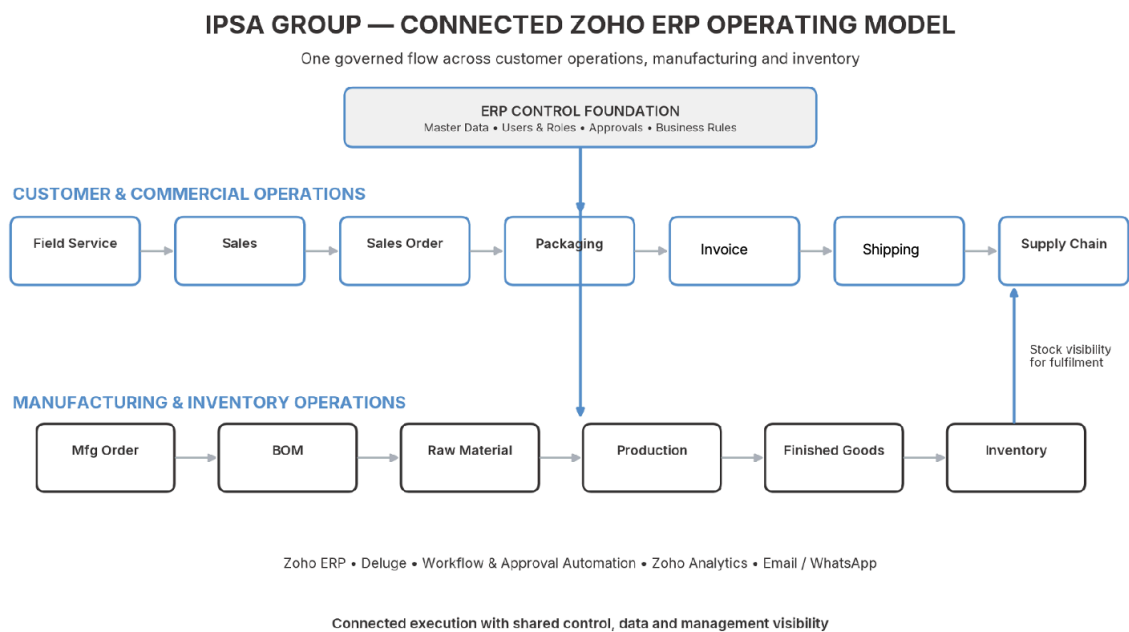


Figure 1 — Connected operating model across customer, fulfilment and manufacturing processes.

Foundation Layer	What It Protects
Users, roles & permissions	Each team works with the access required for its responsibility, supporting accountability and controlled execution.
Master data	Customers, vendors, items, and business locations provide consistent transaction references.
Business rules	Credit, lock/unlock, amount, and duplicate controls prevent invalid downstream transactions.
Approvals	Transactions move forward only after the required review step.
Analytics	Operational and management reporting is built from synced ERP data rather than disconnected spreadsheets.

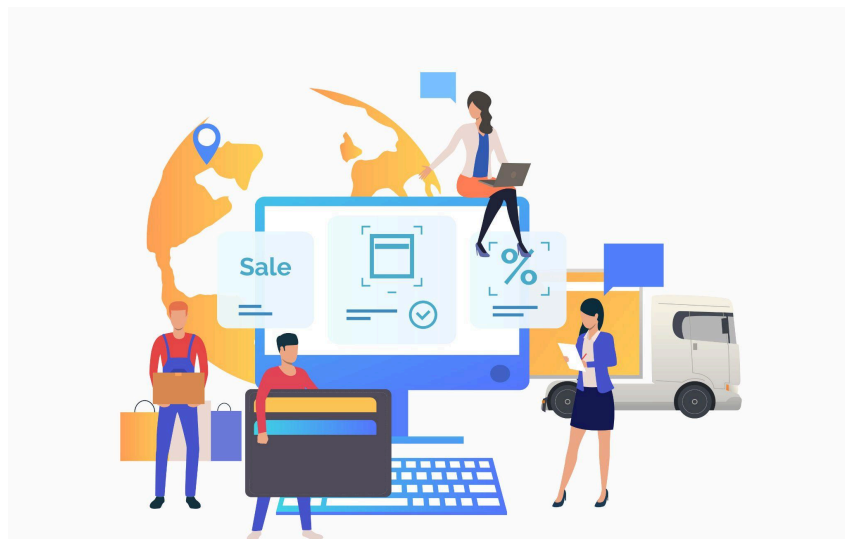
Operating impact

Sales demand, fulfilment activity, production requirements and inventory visibility become part of one business operating model, giving teams clearer ownership and management a more reliable view of execution.



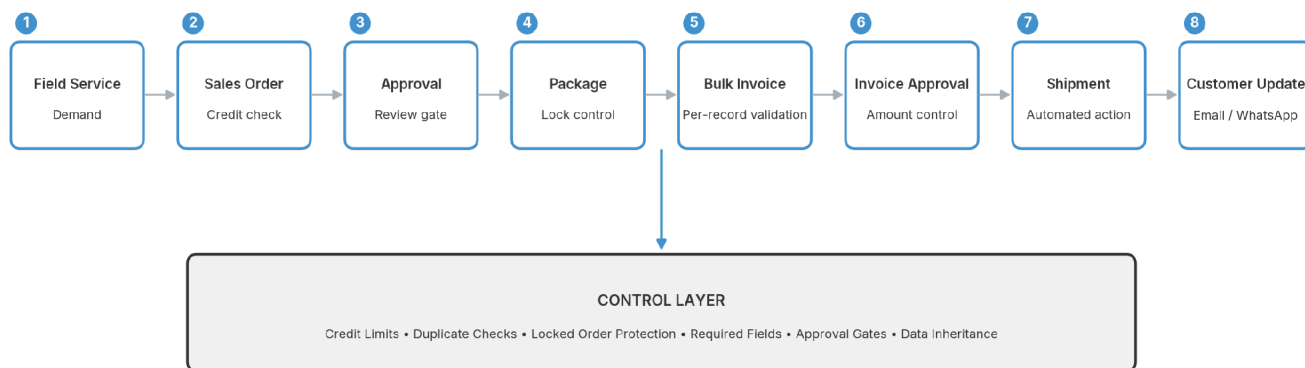
03 Customer & Commercial Operations

The first transformation stream addressed the daily flow from frontline demand and sales engagement through order processing, packaging (Full and Partial), invoicing (Full and Partial), shipment, and customer communication. The focus was to reduce manual intervention while strengthening transaction control.



FIELD-TO-CUSTOMER OPERATIONS — ORDER-TO-CASH FLOW

A controlled sequence from frontline demand to shipment and customer communication



Automation removes repetitive transaction work; validations and approvals keep the process controlled.

Figure 2 — Field-to-customer operating flow with embedded controls.

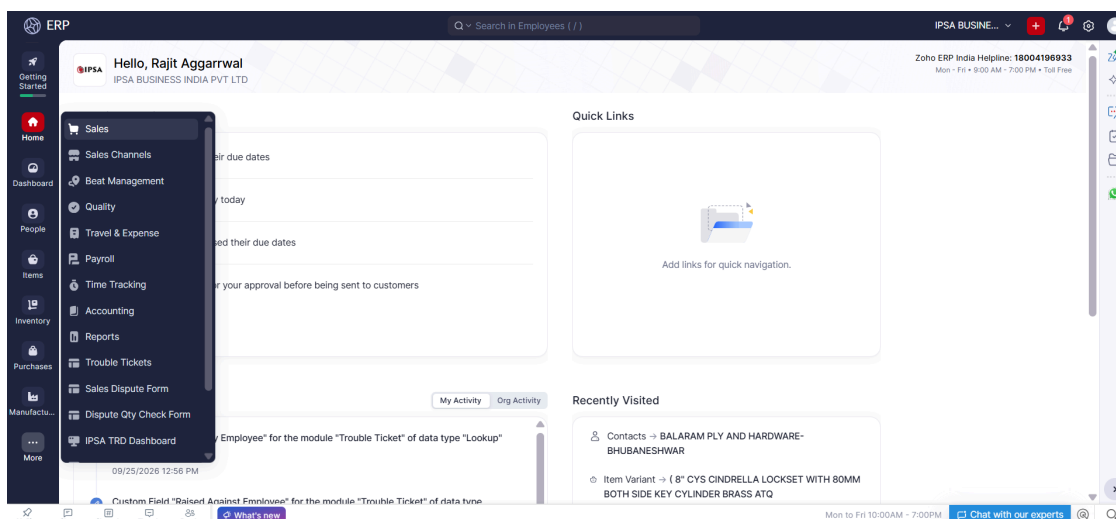


Implementation Highlights

Area	Techsaga Implementation
Sales Order control	Customer credit is checked before saving. Orders with zero or negative usable credit are stopped.
Lock-based fulfilment control	A Lock / Unlock value on the Sales Order is inherited by the Package; locked orders cannot proceed to package creation.
Data inheritance	Price, discount, and custom field values move from Sales Order / Package into the Invoice, reducing re-entry.
Bulk invoice automation	Users can select multiple packages and create invoices in one run. Invalid packages are skipped individually instead of stopping the entire batch.
Invoice validation	Date, COD, duplicate invoice, and zero-amount checks protect invoice quality.
Shipment automation	A custom action creates Shipment records from eligible Invoices after validation.
Customer communication	Dedicated Email and WhatsApp templates support relevant transaction updates
Document output	Invoice PDF layout was customised to the business format rather than relying on a generic ERP template.

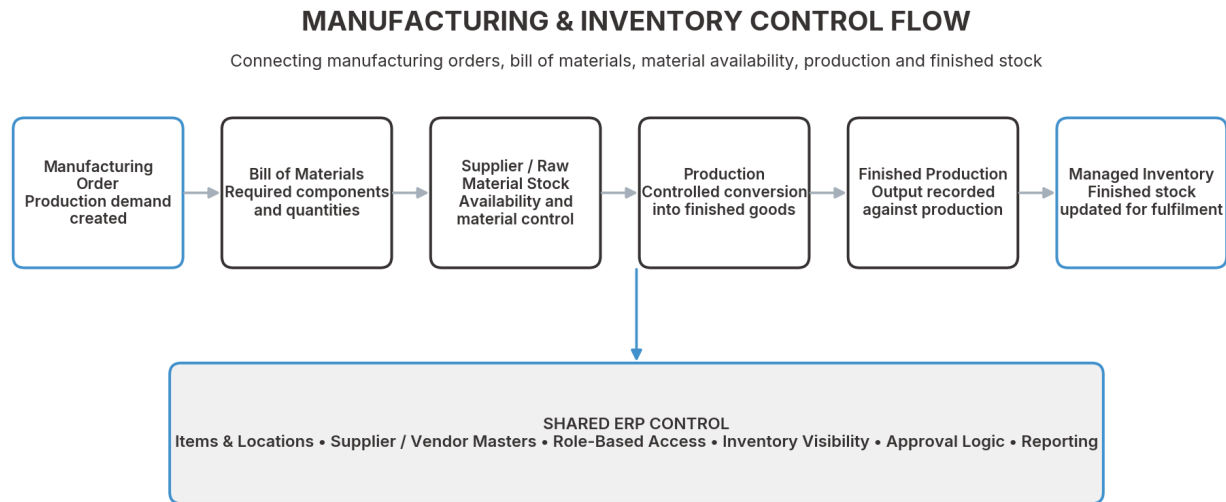
Why it matters

The flow combines speed with control: automation removes repetitive transaction work, while validations and approvals prevent the same automation from accelerating errors.



04 Manufacturing & Inventory Operations

The second operating stream extends the ERP model into production. For a manufacturing business such as IPSA, customer demand and fulfilment cannot be separated from material availability, manufacturing orders, production output and finished stock.



The production layer was designed to keep material movement and finished stock connected to the wider sales and fulfilment process.

Figure 3 — Manufacturing-order-to-finished-inventory operating flow.

Production Control Scope

Stage	ERP Role
Manufacturing Order	Creates the production requirement that needs to be executed and tracked.
Bill of Materials	Defines the supplier/raw-material components and quantities required for the production output.
Material / Supplier Stock	Provides the stock context required to support production and purchasing decisions.
Production	Records the controlled conversion of materials into the intended finished output.
Finished Production	Captures completion against the manufacturing requirement.
Managed Inventory	Updates finished stock so sales, order management and supply-chain teams can work from current availability.

Connected manufacturing, not an isolated factory module

The value of the manufacturing layer is its connection to the wider ERP: material masters, vendor data, inventory and finished goods become part of the same operational information model used by commercial and fulfilment teams.

05 Automation, Governance & Business Controls

The implementation was designed around a simple principle: automate routine activity, but keep business-critical decisions governed. Techsaga used Deluge functions, validation logic, approval workflows, and structured master data to make the ERP dependable in day-to-day use.

Business Risk / Requirement	Implemented Control	Operational Effect
Customer has no usable credit	Credit-limit validation on Sales Order	Stops an invalid order before downstream work begins.
Order should not continue	Sales Order Lock / Unlock inherited by Package	Prevents packaging against a locked transaction.
Invoice already exists	Duplicate check in bulk invoice function	Prevents repeat billing while allowing valid batch records to continue.
Invoice amount is zero	Invoice save validation	Forces correction before financial processing.
Many packages need invoicing	Bulk custom action + per-package Deluge validation	Reduces repetitive transaction creation without hiding record-level errors.
Shipment creation is manual	Invoice → Shipment custom action	Standardises downstream fulfilment creation.
Review is required	Sales Order and Invoice approvals	Introduces clear transaction gates before fulfilment/shipment.
Teams re-enter the same data	Field inheritance between modules	Improves consistency and reduces manual effort.
Customer updates are inconsistent	Separate Email / WhatsApp templates	Makes communication relevant to the transaction stage.

Role-Based Operating Model

Users, roles, and permissions were established before transactional automation. Business locations, items, customers, and vendors were also prepared as master data so automations operate on a controlled information foundation rather than inconsistent records.

Techsaga ERP design principle

ERP automation is only as reliable as the controls, master data, and ownership model underneath it. The implementation therefore combined configuration, custom development and governance rather than treating them as separate workstreams.

06 Analytics, Problem-Solving & Business Outcomes

Reporting was treated as part of the operating solution. Zoho ERP was connected to Zoho Analytics, data was synchronised on a schedule, client-specific reports were built, and the finished dashboards were embedded back inside the ERP through a Web Tab.

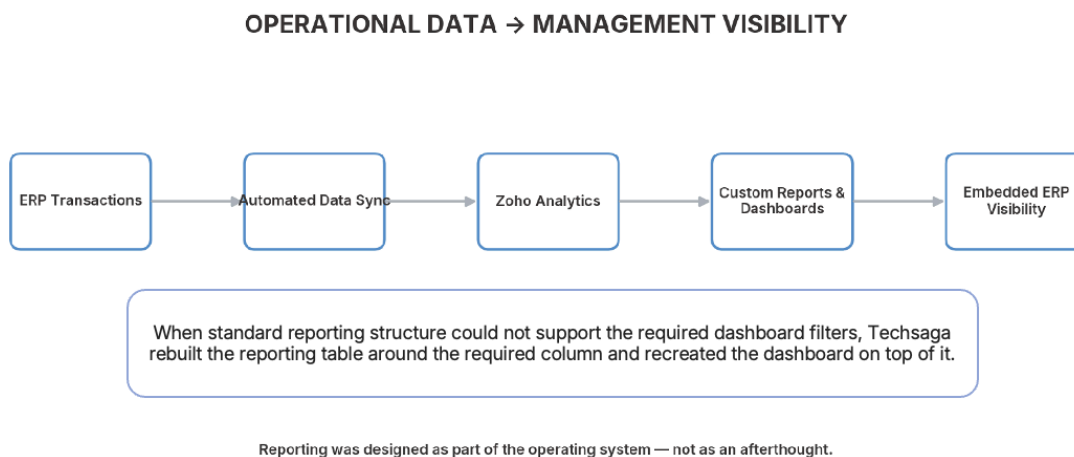


Figure 4 — From ERP transactions to embedded management reporting.

When Standard Reporting Was Not Enough

A dashboard filter requirement could not be supported correctly by the existing Analytics data structure. Techsaga identified the exact columns required, built a new reporting table, and reconstructed the report and dashboard on top of it so the required filtering worked properly. This is representative of the implementation approach: solve the business requirement, not merely configure around the limitation.

Challenge	Techsaga Response
Bulk processing stopped by individual exceptions	Built per-package validation so unsuccessful records are skipped while valid records continue.
Duplicate/invalid transactions	Introduced duplicate, amount, credit, and lock-based validations.
Manual data re-entry	Used field inheritance across Sales Order, Package, and Invoice.
Manual shipment creation	Introduced controlled Invoice → Shipment automation.
Generic documents/notifications	Customised invoice PDF plus transaction-specific Email and WhatsApp templates.
Reporting structure could not support required filters	Created a purpose-built Analytics table and rebuilt the dashboard.
Reporting required a separate application	Embedded Zoho Analytics into the ERP for direct user access.

Business Outcomes

- A connected operating flow from sales demand through packaging, invoicing, shipment, and customer communication.
- Business controls that prevent credit, lock, duplicate, and zero-value transaction errors before they propagate.
- Less repetitive data entry through inheritance and custom automation.
- A production and inventory model that connects manufacturing activity with supply-chain and fulfilment visibility.
- Management reporting built from synchronised ERP data and accessible from within the operating environment.

07 What This Demonstrates About Techsaga

This project reflects the type of Zoho ERP implementation required by manufacturing and distribution businesses in India: one that understands processes across departments, protects operational controls and then uses automation to make those processes easier to execute at scale.

Techsaga Capability	Demonstrated in the IPSA Implementation
Business process architecture	Connected frontline demand, sales, order management, fulfilment, finance, supply chain, and manufacturing into an end-to-end ERP model.
Zoho ERP configuration	Users, roles, permissions, locations, master data, transaction fields, and document templates.
Custom automation with Deluge	Bulk invoice creation, shipment creation, and record-level business logic.
Manufacturing & inventory design	Manufacturing order, BOM, material/supplier stock, finished production, and managed inventory.
Control & governance	Credit limits, lock/unlock logic, approval stages, duplicate prevention, and amount validations.
Customer communication	Email and WhatsApp templates aligned to transaction stages.
Analytics engineering	ERP-to-Analytics sync, custom reporting tables, dashboards, scheduled refresh, and embedded reporting.
Operational problem-solving	Adapted the solution when standard structures did not support the required business behaviour.

For manufacturers evaluating a Zoho ERP Implementation Partner in India

The question is not simply whether a partner can configure Zoho. The stronger test is whether the partner can understand how sales, fulfilment, production, inventory, finance and management reporting depend on one another — and then design the system around those dependencies.



TECHSAGA POSITIONING

Zoho provides the platform. Techsaga connects the operating model, controls, automation, and reporting around the way the business actually works.



The graphic features a light blue background with a subtle grid pattern. At the top center is the Zoho ERP logo, which consists of a blue globe icon with a stylized 'Z' inside, followed by the text 'Zoho ERP'. Below this, the main headline reads 'A new era of ERP software' in a large, bold font, with 'A new era of' in blue and 'ERP software' in green. Underneath the headline is the text 'From Zoho' in a smaller, black font. In the bottom left corner is the Zoho logo, which is a colorful icon of four interlocking squares (red, green, blue, and yellow) with the word 'ZOH O' below it. In the bottom right corner is the URL 'zoho.com/erp'.

ZOHO ERP IMPLEMENTATION • MANUFACTURING ERP • AUTOMATION • ANALYTICS • BUSINESS PROCESS TRANSFORMATION



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