



CRM data integration

Medical equipment manufacturer

Replace existing Skyvia ETL tool with Azure Data Factory to ingest data from Zoho CRM into Azure SQL Data Warehouse

CRM data integration for dental equipment manufacturer

Situation

- Client leverages Zoho CRM to maintain and track customer orders, invoices, and interactions. These data points are updated daily from the ERP using Skyvia, a data integration tool. The data ingestion process was inaccurate which resulted in incomplete / erroneous info being available for reporting purpose. Also, there was a significant manual effort required to update salesperson mapping, in case of changes in the organization.
- Partnered with the client to streamline/automate the data flow process from the source to the reports by building efficient ETL processes and data transformations to ensure that the data reported is complete and accurate

Accordion Value Add

- Analyzed the data and established parent child entity mapping and redesigned the Zoho Accounts module UI to enhance the data quality
- Developed API connections and built pipelines to synchronize the data periodically which enabled the sales team to access required metrics
- Restructured the data flow and optimized the Python code to upload data within the Zoho CRM prescribed limit of 100 records/API call
- Ensured data consistency and calculation uniformity by standardizing the naming convention and business logic and report to match with Zoho Analytics data

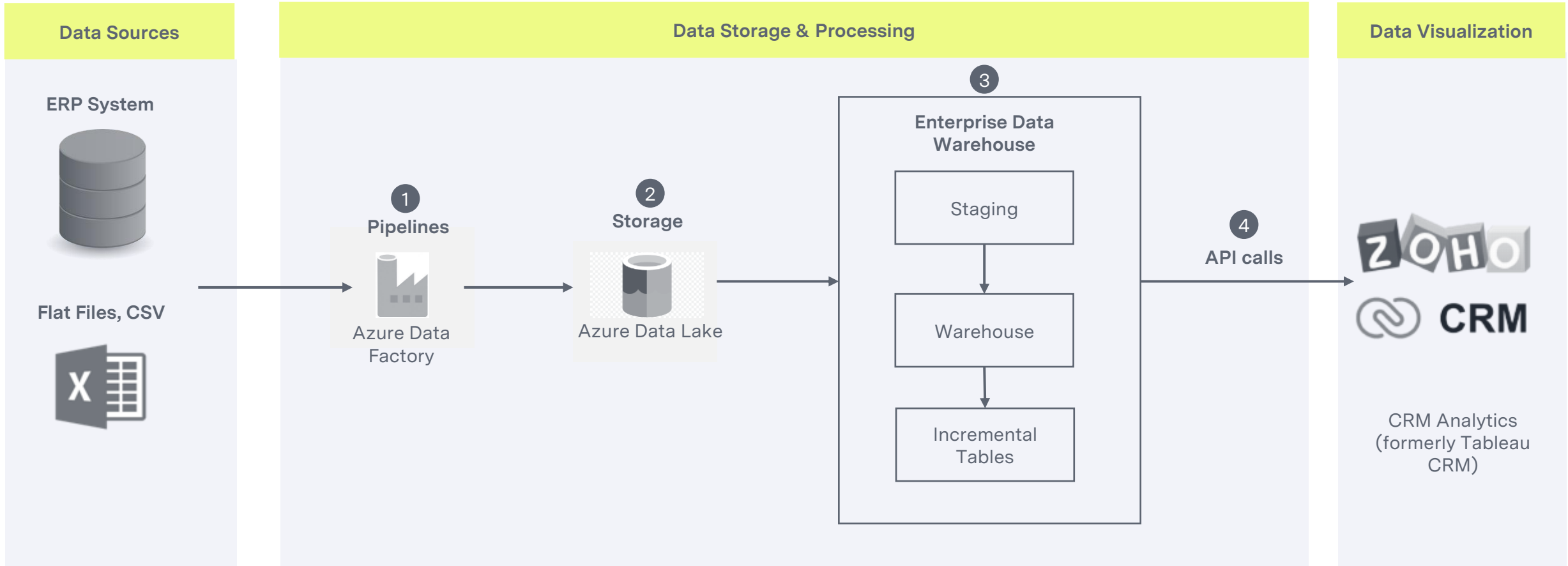
Impact

- The CRM API integration improved the accuracy of CRM to 100% from 85%, which has enabled the sales team to map customer data accurately, providing them with insights into individual customer interactions and revenue
- The system is now capable of automated data updates of salesperson and territory mapping which gets updated along with the Zoho Analytics dashboards which saved ~20 FTE hours per month
- The CRM API integration has reduced dependency on 3rd party tool, and resulted in achieving a cost saving of ~\$5000/ year

Approach & methodology



Architecture diagram of the data flow from source to CRM



- 1 Data Pipelines to collate data from multiple sources and ingest to Data Lake daily
- 2 Data Lake to maintain records of historical data and act as a source of truth
- 3 Data Warehouse consisting for formatted and structured data with required calculated columns
- 4 API Calls, using Zoho CRM API V3.0, to update and insert incremental data into Zoho CRM

Customer page layout from accounts module

CRM

All Tabs

My Jobs

Home

Campaigns

Leads

Accounts

Contacts

Opportunities

Sales Orders

Products

Tasks

Meetings

Services

Related List

Notes

Contacts

Products

Sales Orders

Emails

Opportunities

Open Activities

Quotes

Closed Activities

Attachments

Invoices

Rich Text Notes

Social

Add Related List

Links

Add Link

Overview

Timeline

Sales Summary

YTD

PYTD

2021

2020

2019

2018

Checklist 1

Number of Operatories 1

Exchange Rate

Account Information

Account No

Account No & Addr Key

Account Name

Phone

Email ID

Secondary Email ID

Affiliations

Parent Account Name

Channel

Channel SubType

Segment

Revenue Segment 2021

Year Created

First Order Date

Last Order Date

Total Sales Orders

Average Order Amount

Currency

Account Owner

ASM

Email Opt Out

Sec Email Opt Out

M2M Modified Date

M2M Created Date

M2M Modified By

Modified By

Created By

Layout

Metrics related to revenue, total orders placed, and average order amount a customer has placed

Customer related data like when the account was created and when was it last modified, and we also have shipping data of the customer