

BOM & Inventory Management

Using Zoho Creator

Bagla group



Introduction

A leading tape manufacturing company, relied on Zoho Books to manage inventory, customer data, and sales processes. Key operational details were being maintained separately in Google Forms and Sheets, which created inefficiencies. To centralize operations and enhance productivity, a customized solution was developed on the Zoho Creator platform, integrating key workflows and modules with Zoho Books.

Challenges

1. Dispersed data across Google Forms, Sheets, and Zoho Books leading to inefficiencies.
2. Limited stock and production management tools.
3. Lack of seamless communication between sales and manufacturing processes.
4. Inefficient work order and quotation handling.

Solutions Implemented

1. Zoho Books Integration

- **Modules Used:** Finished Goods, Customers, Quotes, Sales Orders.
 - **Objective:** Centralize inventory and sales-related data within Zoho Books to streamline data management.
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2. Zoho Creator Customization

- **Forms & Reports:** Developed customized forms and reports to migrate and manage data previously maintained in Google Forms and Sheets.
- **Record Templates:** Created tailored templates to simplify data entry and ensure consistency.

3. Master Data Management

- **Core Business Entities:** Established master data modules to manage essential information, including materials and product details.
- **Stock Management:** Designed stock addition and maintenance features to enable accurate inventory tracking.

4. Work Orders & Bill of Materials (BOM)

- **Work Orders:** Developed a module to automate work order creation and management for production.
- **BOM Customization:** Integrated a customized Bill of Materials (BOM) to align with Bagla Groups manufacturing process requirements.

5. Printing Job Management

- Designed a specialized module within Zoho Creator to handle and monitor printing jobs seamlessly.

6. Quotation to Factory Process

- **Quotation Module:** Added a custom button in Zoho Books for factory acceptance.

- **Factory Acceptance Template:** Developed a factory acceptance template to streamline approvals and communication between sales and production teams.

Key Benefits

1. **Centralized Data:** Seamless integration of Zoho Books with Zoho Creator improved accessibility and data management.
2. **Improved Efficiency:** Automated workflows reduced manual tasks across sales, inventory, and production.
3. **Enhanced Accuracy:** Customized forms and templates ensured consistent, error-free data entry.
4. **Streamlined Operations:** Integrated solutions for work orders, BOM, and printing jobs optimized manufacturing workflows.

Conclusion

The successful integration of Zoho Books with Zoho Creator has transformed Bagla Groups operations. By centralizing data, automating workflows, and customizing tools, Bagla Groups now benefits from an efficient, streamlined system that enhances inventory management, sales processes, and production workflows.