ZYENAC

SCOPE OF WORK

BUSINESS: Azole Chem Sciences

Products:

ZOHO Creator

Zyenac Solutions Private Limited | www.zyenac.com

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CASE STUDY: Zoho Creator Application for Chemical R&D Project Tracking

Client: Azole Chem Sciences

Prepared By: Zyenac Solutions

Applications : Zoho Creator

1. Client Introduction

Azole Chem Private Limited is a chemical research and product development company specializing in the development of new chemical formulations. Each product is treated as an independent R&D-driven project, requiring structured tracking of project leads, detailed costing, raw material usage, and daily research activities. With a strong focus on innovation and accuracy, Azole Chem required a centralized digital system to improve visibility, control costs, and streamline R&D operations.

To address these requirements, **Zyenac Solutions** designed and implemented a customized application using **Zoho Creator**, enabling end-to-end project tracking, automated costing, R&D activity logging, and integrated inventory and cost management. The solution helped Azole Chem transition from manual and spreadsheet-based processes to a scalable, role-based, and data-driven system supporting informed decision-making and operational efficiency.

- **Project Overview**

The client is a chemical product development organization where each new chemical formulation is treated as an independent project. To streamline operations and bring visibility across project lifecycles, a custom application was designed and developed using Zoho Creator. The solution acted as a centralized platform to manage project leads, prepare detailed costing sheets, and track R&D activities. In subsequent phases, the application was extended to cover project cost tracking and raw material inventory management.

The overall solution replaced fragmented spreadsheets and manual tracking with a scalable, role-based, and integrated digital system.

- **Objectives Achieved :**

The Zoho Creator application successfully met the following objectives:

  - o **Enabled tracking of project leads from initial inquiry through detailed costing and approval.**

  - o **Automated preparation of cost sheets with real-time data fetched from Zoho Inventory.**

  - o **Captured daily R&D activity logs against each project for better traceability.**

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- o **Implemented structured project cost tracking and raw material inventory management in later phases.**

- o **Provided role-based access controls and actionable reports to support management decision-making.**

- **Solution Scope & Implementation**

- o **Phase 1 – Core Project Tracking & Costing :** Phase 1 focused on building the foundational modules required for project initiation, costing, and R&D tracking.

1. Customer Management

A Customer Management module was developed to maintain structured customer records, including name and address details. These customer records were configured as lookup fields across other modules, ensuring consistency and eliminating duplicate data entry.

2. Project Lead Management

A Project Lead Management module was implemented to capture inquiry and opportunity details. The module included:

- Lookups to Customers, Items, and assigned R&D Heads.

- Costing-related input fields with automated total cost calculations.

- A decision workflow that allowed approved leads to be pushed into the Project Tracker.

- Automated Project Code generation based on Lead Name, Item Code, and date, ensuring uniqueness and traceability.

3. Costing Sheet Preparation

A dedicated Costing Sheet module was developed to prepare detailed project-wise cost sheets. Key features included:

- **Automatic fetching of CAS Name, Raw Material Name, and Rate per Unit from Zoho Inventory.**

- **Real-time calculations such as Total Cost (Quantity × Rate) and Estimated Total (ET) Cost.**

- **Export functionality to PDF and Excel formats for easy sharing and approvals.**

- **Role-based access restrictions, limiting visibility and edit rights to R&D Heads.**

This automation significantly reduced manual errors and improved costing accuracy.

4. R&D Daily Logs

An R&D Daily Activity Log module was implemented to capture day-to-day research activities. R&D Heads were able to log:

- Project Code

- CAS Number

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- Item Name

- Detailed activity descriptions

The simplified input design ensured high adoption by the R&D team while maintaining detailed records for audits and reviews.

5. Phase 1 Reports

A Daily R&D Activity Report was developed in a tabular format, enabling management to review activities by date and project. This provided immediate visibility into ongoing R&D efforts.

- **Integrations**

  The Zoho Creator application was seamlessly integrated with Zoho Inventory as part of Phase 1. The integration enabled:

  - Real-time fetching of CAS Name, Raw Material Name, and Rate per Unit for costing sheets.

  - Optional stock availability checks during costing and planning stages.

  This integration ensured data consistency across systems and eliminated redundant data maintenance.

- **Access Control & Security**

  Role-based access control was implemented to ensure data security and accountability:

  - **Admin:** Full access to all modules and configurations.

  - **R&D Heads:** Access to Project Leads, Costing Sheets, and Daily Activity Logs.

  - **Stock / Accounts Users:** Restricted access to Vendor Management, Stock Entry, Consumption tracking, and Reports only.

- **Deliverables Summary**

  Phase 1 Deliverables:

  - Customer Management Module

  - Project Lead Management with automation

  - Costing Sheet Preparation with Zoho Inventory integration

  - R&D Daily Activity Logs

  - Phase 1 Reports

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- **Business Impact**

The implemented Zoho Creator solution provided the client with a unified platform for managing chemical R&D projects end-to-end. The system improved operational efficiency, enhanced cost visibility, reduced manual effort, and enabled data-driven decision-making. The scalable architecture ensured that future enhancements could be added seamlessly as business requirements evolved.

- **Business Impact**

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