Zyenac Solutions' employee-centric digital transformation

Find out how Zyenac Solutions delivers an exceptional employee experience with their suite of custom applications.

ZYENAC
SOLUTIONS

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Zyenac Solutions:

A distinguished financial firm transforms itself into a digital native

Zyenac Solutions is a 30+ year old financial firm headquartered in Hyderabad. They're a team of CAs, CSs, CPAs, legal professionals, engineers, and technically sound domain specialists supporting startups and existing businesses in their growth journey. Zyenac Solutions has been the partner of choice for companies because of their experience accounting, auditing, and taxation.

They bridge the gap between their client's requirements and business models by understanding the bottlenecks in scaling up. They've come up with practical and innovative solutions to link and create integrated systems.

Like other accounting firms, Zyenac used labor-intensive spreadsheets to maintain their assignments, which helped them manage and access information easily. Spreadsheets played a key role in accelerating their early growth.

But as the number of clients grew, so did the demands on their IT. They started looking for a solution that would make their operations more responsive to customer needs. An ideal solution had to be faster, flexible to change, and support them with their growing backlogs.
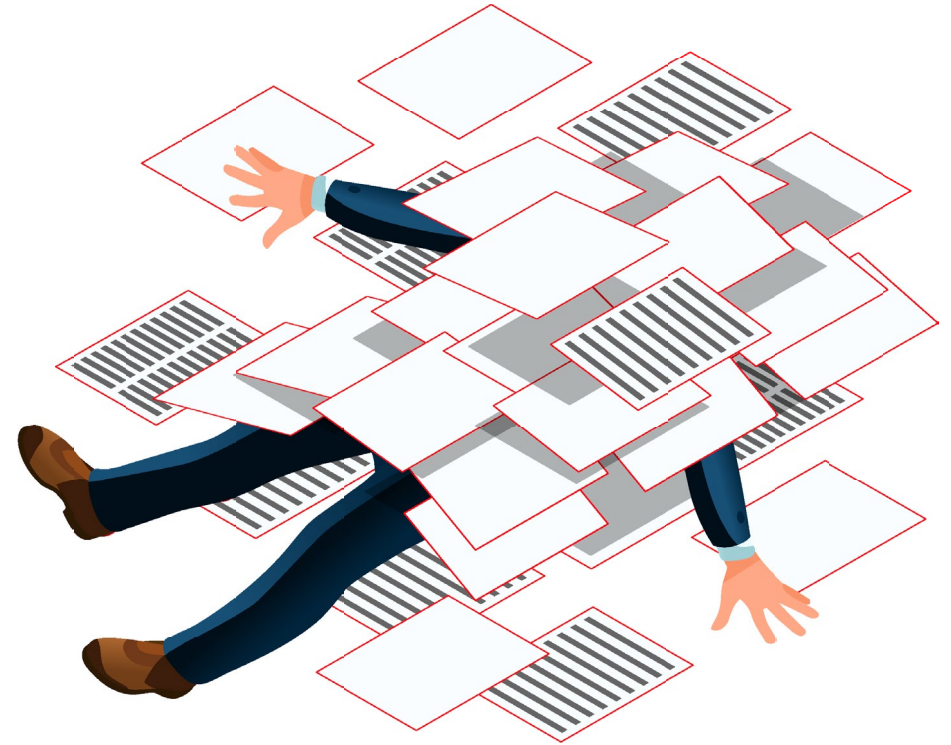
This led them to Zoho Creator, and this is their story.

Mission:
Escape from spreadsheets

Zyenac Solutions knew things were about to change when their growth began rapidly accelerating. Although spreadsheets met their initial requirements, it was frustrating that continuous customization and improvement couldn't be achieved. And spreadsheets were also prone to duplicating data, rendering it unreliable. This forced them to evaluate office management tools, like MyTask and Wolters Kluwer solutions. But they all failed to meet their requirement of accessing applications on their mobile devices.

They wanted a tool that would help them overcome common challenges faced while using spreadsheets, and also give them better control over employees who have access to confidential data.

The teams weren't able to collaborate efficiently on spreadsheets, and found it difficult to perform actions like

- defining fields
- determining processes
- defining forms based on specific jobs
- setting up reminders
- configuring multilevel approvals

The approval process required the presence of an approver, which was extremely time-consuming and caused unnecessary delays. Data was scattered, and in some cases unreliable due to the lack of a standard format. They also had difficulty in finding skilled resources to work on the spreadsheets, or training new associates for the task.

Every time a new case was taken, they had to assign the job manually, provide information to the audit clerks, and keep track of all the processes.

The need for a fast, flexible tool

Zyenac Solutions realized that they lacked an efficient internal process management software necessary to carry out these tasks. They wanted a tool that could help them assign jobs to different clerks, share client information, track the status of ongoing processes, and document supporting transactions.

They also wanted the tool to help their employees stay on top of their assignments from wherever they were, giving them the ability to be responsible and accountable for the assigned job. They realized that only a reliable task management or a client management application could help them increase their firm's revenue and client list, and run a successful accounting practice.

Low-code proves
a perfect fit

Zyenac Solutions are authorized partners for the Zoho Finance suite. After awhile, they developed a liking for other Zoho products—which led them to stumble upon Zoho Creator and the ability to achieve the functionality they required.

> *The fact that we can, ourselves, create an application for our organizational needs, without a need for great development or coding skills, sold Zoho Creator to us.*
>
> **- Gopi Krishna P**, Chartered Accountant

As they knew their requirements clearly, they were quickly able to build applications to meet those needs. With Zoho Creator, they were able to organize large volumes of customer data, and find information faster with quick filters. Everything was in a single place.

They were also able to access the application on their mobile devices, which was one of the most important advantages. This gave them the means to retrieve key documents and approve the work submitted by audit clerks on the go. Everything was accessible anytime and anywhere, making it easier for them to quickly know where things stand whenever a client asked. Managing client relationships became easy, which helped Zyenac Solutions work more efficiently, and enabled everyone in the organization to access and keep track of relevant information.

We didn't face great challenges in switching to Creator. Once built, I think it was child's play for our teams to work on our Creator app, with minimal scope for manual errors and greater accountability.

- Gopi Krishna P, Chartered Accountant

The Deluge scripting language was fun to learn and execute. That improved our confidence in development and usage of the application we built on Creator.

- Gopi Krishna P, Chartered Accountant

Key takeaways

Seamless collaboration

Zero errors in process flow

Greater efficiency in data collection

Mobile interface and approvals on the go

Savings of ₹300k in operations

Meeting today's demand—and tomorrow's challenges

After just a few months, Zyenac Solutions built their own application with which they were able to track their overall business. It led them to more seamless collaboration with their employees, and eliminated errors in the process flow. This provided them with a significant competitive advantage among other accounting firms.

The new solution integrates with almost every system in the firm and is used by all employees. Aside from being an intuitive and affordable solution for Zyenac, Zoho Creator also provided a host of other benefits.

The most valuable ones including:

Speeding up the approval and review process through automation, and eliminating the need for the physical presence of the person in charge.

Customized reports to store accurate information, enabling better-informed decisions.

Increased customer experience and quality of service, as all client information was in one place. And contact details, documents, and communication with every team member was available to access from anywhere.

Everyone had what they needed at their fingertips, increasing workflow transparency and showing the task status assigned to different users.

Always available database of organized information, and a mobile app that allows access to customer information whenever required.

Digitization assists Zyenac in automating monotonous tasks, and managing compliance, accounting, and operations functions, including accounts, reports, and analysis. It also reduces the possibility of cyber attacks and minimizes errors that occur.

Importantly, thanks to low-code, the system is quick to adjust and enhance. Based on the success of their application, Zyenac is already considering extending the solution to cater to more complex business needs. They're looking at extending the usage to other manual tasks, and how best they can use the tool to communicate with their clients.

> *You can build your own enterprise solution in Creator. Every business is unique, which requires a unique solution that's possible with Zoho Creator.*
>
> **- Gopi Krishna P,** Chartered Accountant

About us

Running a business is no mean feat, and we believe we can help. At Zoho Creator, we've always worked towards a single purpose - enabling the citizen developer to build functional apps without having to learn to code. Rapidly build custom applications that are a perfect fit for your business, or choose from our extensive range of pre-built apps and modify them. Just sign up, pick a plan, and start building!

ZOHO Creator

www.zoho.com/creator/

We'd love to talk! Reach out to us:

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