

Zoho Thrive Setup and Chatbot Development with ChatGPT integration

Introduction

Aerial Ashes Tri-State provides an ash-scattering service that allows anyone to access beautiful, memorable locations for the final release of ashes, while also easing the anxiety some people feel about handling the process themselves.

Aerial dispersal provides a clean, effective way to release the ashes and opens up a wide range of locations over both land and water. Nevertheless, helicopter-based ash scattering is not feasible or accessible for everyone.



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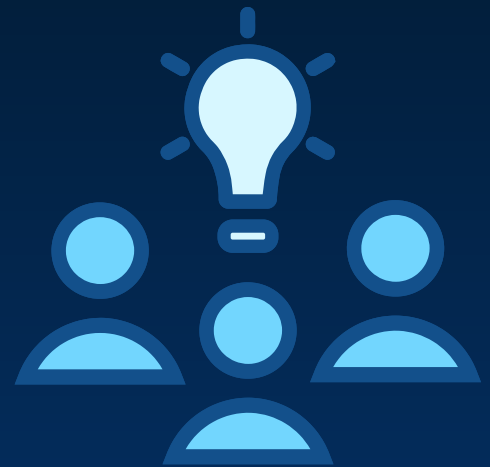


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Case Study

Organization

Aerial Ashes (Tri State)



Mission & Vission

We are committed to providing high-quality services and demonstrating professional competence in all our business operations. To develop and deliver an innovative platform, utilize the full capabilities to provide customers with personalized insights, exceptional support and fostering financial growth and trust.

Challenges

Referral Data Management



Managing referral data is difficult due to inconsistent or incomplete information coming from multiple sources.

Ensuring data accuracy and avoiding duplication requires strong validation and tracking processes. Integrating referral data across systems can be challenging because of differing formats, privacy rules, and technical limitations.

Commission Process Issues



The commission process often faces delays due to unclear workflows and inconsistent data inputs.

Manual calculations or outdated systems can lead to errors and payment discrepancies. Tracking approvals and ensuring transparency is difficult when multiple departments are involved.

Setup Partner Portal for Commission Management



Manual commission management increases the risk of calculation errors and inconsistencies. It requires significant time and effort, slowing down payout cycles.

Lack of automation makes tracking, auditing, and resolving disputes more difficult.

Solution



Automated Referral Data Managemnet

Fairchance for CRM integrated an automated data integration system, seamlessly connecting Zoho Thrive with **Zoho CRM**. A partner referral program is setup using **Zoho Thrive** and integrate it with Zoho CRM to manage referral data efficiently. This eliminated the manual transfer process, ensuring real-time data availability and accuracy.

Automated Commission Process

Zoho CRM provides an effective solution by define rules for calculating commissions, such as flat fees. Automate the approval process and track commissions accurately. Generate payout reports and maintain comprehensive records of past payments.



Solution



Setup Partner Portal

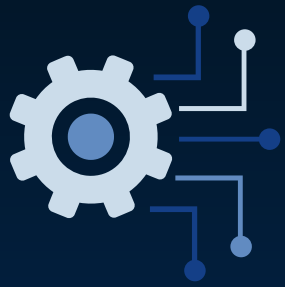


Commission Management via creating a partner portal in **Zoho Creator** and integrating it with **Zoho CRM**, Allow funeral directors to submit referrals directly through the portal. Enable partners to track their commission status in real time. Provide access to marketing materials such as PDFs, videos, and brochures. Facilitate ordering of leaflets and other promotional materials for distribution.

Result

Fairchance for CRM made a significant impact on improving **Aerial Ashes** business operations by strategically implementing customized solutions from **Zoho Thrive** and **Zoho CRM**. Their comprehensive approach not only addressed existing challenges but also paved the way for a more data-centric, structured, and agile operational framework, setting **Aerial Ashes** on a path for continued success.





Case Study

Applications Implemented



Zoho CRM



Zoho Thrive



Zoho Creator



About Fairchance For CRM

AIRCHANCE FOR CRM provides round-the-clock services and maintenance to keep your business on the growing and developing track to generate the revenue within the budget. We have expert team to work on the Zoho CRM platform thoroughly with all of automation and innovation. In addition to this, we are able to provide individualized solutions that are adapted to match the particular requirements of each customer, so ensuring the highest possible levels of efficiency and production.

With 700+ customers in 70+ countries, today we are all set to become a trusted growth partner to your business!

For the purpose of assisting businesses in improving their customer relationship management, the FAIRCHANCE FOR CRM platform offered solutions that were both individualized and efficient in terms of cost. enterprises are able to obtain significant insights into the behavior and preferences of their customers using the platform's powerful analytics capabilities, which in turn enables the enterprises to modify their marketing tactics in accordance with those preferences. Businesses have the ability to improve customer happiness and loyalty while simultaneously optimizing their use of resources to achieve optimum efficiency when they implement FAIRCHANCE FOR CRM.



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