



Zoho One Implementation Case Study

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Your Complete Partner in Digital Transformation

(From Zoho to AI, everything your business needs to scale to 100 Cr and beyond)

Aequitas empowers businesses to modernize, optimize, and grow with future-ready digital solutions. From startups to MNCs, we deliver technology, strategy, and automation that drive measurable results.



Mission Statement

Helping businesses grow through digital transformation with innovative solutions and scalable strategies.

Vision Statement

To empower 10,000+ businesses by 2030 to grow and transform digitally, making digital success accessible, measurable, and impactful for all.

Our Purpose

To contribute to Viksit Bharat by helping people grow wealth and enabling businesses to level up through digital transformation.

360° Digital Transformation Services

We go beyond implementation; we co-create scalable systems that unlock long-term value.

01 Digital & AI
Transformation

02 Web Solutions

03 Mobile App
Development

04 Digital
Marketing

Executive Summary

AYRO, a US-based ride-sharing and ride-hailing startup, partnered with Aequitas to implement the Zoho One ecosystem. The solution centralised customer support, communication, marketing integrations, and analytics, enabling streamlined operations and scalable growth.

Client Background

- AYRO rider provides on-demand transportation and logistics services, connecting customers with nearby drivers for quick and reliable transport solutions.
- As the business expanded, managing operations across multiple channels became increasingly complex. The company required an integrated platform that could centralize operations, support teams, and marketing activities while maintaining scalability.

Challenges Before Implementation

- Fragmented communication systems across customer support channels
- No centralized data ecosystem for cross-department visibility
- High dependency on manual coordination and task management
- Limited automation in customer engagement and operational workflows
- Lack of integrated marketing infrastructure for scalable campaigns
- Inadequate analytics and reporting for performance tracking

Solutions Implemented by Aequitas

1. Centralized Communication Infrastructure

Configured Zoho Mail and TeamInbox to establish domain-based email systems and shared inbox management, enabling structured communication, better collaboration, and controlled access across departments.

2. Multi-Channel Customer Support System

Implemented Zoho Desk and SalesIQ to build a unified customer support system, integrating live chat, chatbot automation, and ticket management for handling customer queries across multiple channels efficiently.

3. Cloud Telephony Integration

Integrated Aircall to enable cloud-based calling operations, including inbound/outbound call management, call tracking, and centralized communication logs for improved customer support handling.

Solutions Implemented by Aequitas

4. Workflow Automation & Process Optimization

Designed and implemented automation using Zoho Flow and bots to enable trigger-based workflows, cross-platform data synchronization, and process automation, significantly reducing manual operations.

5. Internal Collaboration & Bot Automation

Configured Cliq and Desk bots to automate internal notifications, alerts, and task triggers, improving team coordination and reducing dependency on manual follow-ups.

6. Marketing Automation & Multi-Channel Engagement

Established a marketing infrastructure using Zoho Campaigns, along with WhatsApp, Telegram, SMS, Meta, and Google integrations to enable multi-channel customer engagement and campaign readiness.

Solutions Implemented by Aequitas

7. Data Analytics & Conversion Optimization

Developed dashboards in Zoho Analytics and implemented Zoho PageSense to enable real-time reporting, user behavior tracking, A/B testing, and performance analysis for better decision-making and optimization.

8. System Integration & Data Connectivity

Integrated WordPress with Zoho ecosystem and guided mobile app integration through APIs, ensuring seamless data flow between website, mobile app, and backend systems.

9. Performance Monitoring & Reliability Management

Implemented Site24x7 for uptime monitoring, system health tracking, and real-time performance alerts, ensuring system reliability and proactive issue resolution.

All Modules Implemented (Zoho One Ecosystem)

1. Customer Support & CRM Layer



Zoho Desk

- Centralized ticketing system
- Multi-channel support (email, chat, social)
- SLA management & automation



Zoho TeamInbox

- Shared inbox for team collaboration
- Internal visibility on conversations
- Faster response coordination



Zoho Mail

- Domain-based professional email setup
- Configured across multiple domains
- Secure communication infrastructure

2. Customer Engagement & Communication



Zoho SalesIQ (Zobot)

- Shared inbox for team collaboration
- Internal visibility on conversations
- Faster response coordination



Zoho Voice

- Cloud telephony system
- Call tracking, recording & analytics
- Integrated with support workflows



Messaging Integrations

- WhatsApp (via API / SalesIQ)
- Telegram automation
- SMS workflows

3. Automation & Workflow Engine



Zoho Flow

- Cross-application automation
- Workflow triggers between systems
- Reduced manual operations

4. Analytics & Intelligence



Zoho Analytics

- Centralized dashboards
- Operational + marketing insights
- Data-driven decision-making

5. Website & Behavior Tracking

Zoho PageSense

- Visitor behavior tracking
- A/B testing
- Conversion optimization

6. Field Operations & Advanced Tools

Zoho Lens

- Remote assistance with live visuals
- Real-time issue resolution
- Improved field support efficiency

Zoho Sign

- Digital document signing
- Contract automation
- Paperless workflows



Zoho Bookings

- Appointment scheduling system
- Automated confirmations & reminders
- Calendar synchronization

7. Marketing Infrastructure (Setup Only)



Zoho Campaigns (Mail Campaigns)

- Multi-domain email setup
- Segmented campaign readiness



Marketing Integrations

- Digital document signing
- Contract automation
- Paperless workflows

WhatsApp Marketing Integration

- Connected via chatbot/API
- Automated engagement flows

CRM Sync

- Automatic lead capture
- Marketing-to-sales pipeline flow

8. Integration & API Layer

Mobile App Integration (API Guidance)

- Automatic lead capture
- Marketing-to-sales pipeline flow

Business Impact

- Improved operational efficiency through automation
- Reduced manual work and process delays
- Faster customer response and ticket resolution
- Centralized customer support system
- Unified communication across Email, WhatsApp, Telegram, and Calls
- Eliminated communication gaps between teams
- Real-time visibility into operations and performance
- Data-driven decision making with analytics dashboards
- Strong foundation for marketing automation and lead management
- Seamless integration between marketing and support systems
- Enhanced customer experience across all touchpoints
- Increased team productivity and coordination
- Scalable system ready for future growth and expansion
- API-ready architecture for mobile app integration
- Future-ready setup for AI and advanced automation

Conclusion

The Zoho One implementation for Pickup Inc successfully transformed the business into a connected, automated, and scalable ecosystem. By unifying operations, communication, and marketing under one platform, Aequitas enabled Pickup to streamline processes, improve customer experience, and gain complete visibility across all functions. What was once a system of fragmented tools and manual workflows is now a centralized, intelligent business infrastructure built for growth.

Outcome Snapshot

- Faster operations
- Smarter decision-making
- Better customer experience
- Scalable business system

Let's step forward with
technology and transform your
business through Digital & AI.

What Makes Us Different.

 15+ Years of Proven Expertise

 We Served 500+ Businesses

 50+ International Clients

 80%+ Repeat Business

 Ethical & Transparent Practices

 Trusted Partner for Digital Growth

Clients We Work With



Thank You