

zoho one

Implementation Case Study

Client : Peers Global
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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.

Executive Summary



Peers Global is a digital membership-based community platform operating similarly to subscription models like Netflix. They required full automation for membership onboarding, payments, data capture, customer support, and internal communication.

Aequitas implemented an end-to-end Zoho One ecosystem using more than 18 Zoho applications - delivering a highly automated, scalable, and unified digital infrastructure.

Client Background



Peers Global serves a large membership community and needed a reliable, automated backend system to manage subscriptions, online payments, customer onboarding, workflows, and service delivery with minimal manual intervention

Challenges Before Implementation

- Manual invoice creation
- Manual payment collection
- No automation in membership workflows
- No centralized communication
- No structured customer support system
- No automated lead capture or follow-up
- No online checkout for membership subscriptions

Zoho Applications Utilized (18+ Modules)



Aequitas integrated a wide suite of Zoho One applications to build a large-scale, automated system

Core Business apps

- Zoho Books – Automated billing & receipts
- Zoho Inventory – Stock/asset tracking
- Zoho CRM – Membership lifecycle pipeline
- Zoho Commerce – Online membership purchase portal
- Zoho Subscriptions – Subscription management
- Zoho Checkout – Online payments
- Zoho Forms – 100% automated data capture
- Zoho Creator – Custom membership backend engine
- Zoho Flow – App-to-app workflow automation
- Zoho Analytics – Real-time dashboards & KPIs

Zoho Applications Utilized (18+ Modules)

Communication & Collaboration:

- Zoho Mail – Authentication & access control
- Zoho Cliq – Internal alerts & communication
- Zoho Meeting – Virtual sessions
- Zoho WorkDrive – Centralized document storage

Support & Operations:

- Zoho Desk – Customer support automation
- Zoho SalesIQ – Website chatbot & visitor analytics
- Zoho Campaigns – Email automation
- Zoho Social – Social media automation
- Zoho Projects – Team coordination
- Zoho Vault – Secure password management

Solutions Implemented by Aequitas



1. Automated Membership Billing (Zoho Books + Checkout)

Invoices and receipts now generate automatically after every payment.

2. Membership Lifecycle Automation (Zoho CRM)

A custom CRM pipeline manages lead → member → renewal → expired stages.

3. Online Membership Portal (Zoho Commerce)

Members can subscribe online instantly using integrated checkout.

4. Lead & Data Automation (Zoho Forms)

All data flows automatically into CRM and Creator apps.

Solutions Implemented by Aequitas



5. Custom Backend Logic (Zoho Creator) ..

Membership validation, rules, workflows, and digital access automation.

6. End-to-End System Integration (Zoho Flow)

Every app is connected so the entire system works automatically

7. Support Desk Automation (Zoho Desk)

Tickets created automatically from email, forms, and website

8. Real-Time Alerts (Zoho Cliq)

Automated notifications for payments, new signups, and renewals.

Results & Impact



- 100% automated lead capture
- Zero manual follow-ups
- Fully automated membership activation
- Online payment system enabled
- Full backend automation using Zoho Forms + Creator
- Instant internal communication via Cliq
- Efficient customer support via Zoho Desk
- Centralized dashboards through Zoho Analytics
- End-to-end integration across 18+ Zoho apps

Zoho Implementation Strength



Aequitas delivered a large-scale Zoho One implementation using more than 18 applications, demonstrating strong capability in automation, membership management, CRM engineering, custom app development, workflow design, system integration, and enterprise-level deployment. This positions Aequitas as a high-level Zoho One implementation partner.

Conclusion

Peers Global now operates like a fully automated, subscription-driven digital platform. From lead capture to onboarding, payments, support, analytics, and communication—everything runs through a centralized, intelligent, and scalable Zoho One ecosystem designed by Aequitas

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

What Makes Us Different.



 15+ Years of Proven Expertise

 80%+ Repeat Business

 We Served 500+ Businesses

 Ethical & Transparent Practices

 50+ International Clients

 Trusted Partner for Digital Growth

Clients We Work With



Thank You