



**RELEVATE**

LIFT | RAISE | LIGHTEN



# Case Study

WishMed - CRM | Inventory |  
Sign | Books | Creator

## THE CHALLENGE

WishMed, a leading medical equipment supplier, faced hurdles with Zoho Inventory's limitations, specifically, the inability to split sales orders and import batch numbers with bin locations, essential for managing over 3,000 SKUs.

Already on Zoho CRM and planning a move from MYOB to Zoho Books (with PayBooks integration ahead), WishMed required a customized, fully integrated Zoho solution to streamline operations and support their complex inventory workflows.

## THE SOLUTION

To overcome Zoho Inventory's limitations, Releviate delivered a tailored, integrated solution:

- **Sales Order Splitting:**  
Custom automation split orders by item availability, enabling faster shipping of in-stock items and efficient backorder handling.
- **Batch Import Integration:**  
A custom Zoho CRM module enriched item data with batch and bin details, then synced it to Zoho Inventory via API, ensuring a seamless, error-free transition.

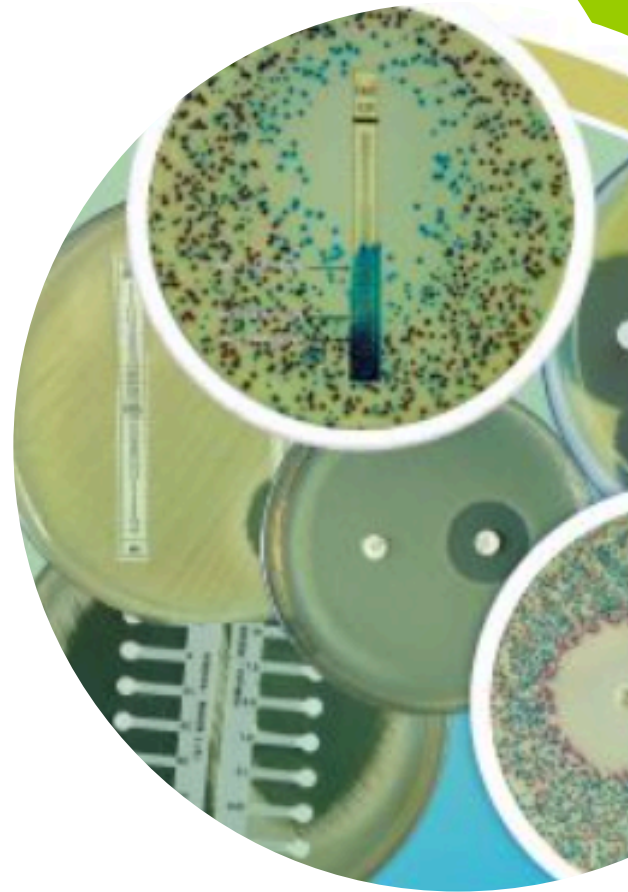
**Releviate rescued a near-failed Zoho migration with a custom solution and went on to deliver powerful features that transformed efficiency across customer service, purchasing, and accounts.**

**-Ishika Singh**

# THE OUTCOME

WishMed now operates a fully functional and user-friendly Zoho Inventory system, with key automations and configurations that improve efficiency across their order and inventory workflows:

- Backorder Invoicing: Custom workflows enable invoicing based on pick list quantities, even when items are backordered.
- Default Tax Automation: Purchase orders and vendor profiles now include preset tax rules for consistent application.
- Automated Receiving Locations: Received items are auto assigned to predefined warehouse zones for streamlined "Putaway" processing.
- Backorder Visibility: custom report lists all received and stored items, helping customer service track and update clients on backordered products.
- Mobile Proof of Delivery: Zoho Sign integration captures digital signatures on delivery, accessible from mobile devices.
- Purchase Order Consolidation: The system automatically combines low-stock items into single purchase orders per supplier, eliminating manual input).



**Backorder Invoicing**



**Automated Receiving Locations**



**Mobile Proof of Delivery**



**Default Tax Automation:**



**Backorder Visibility**



**Purchase Order Consolidation**

**This project demonstrates how Zoho's flexibility can be harnessed to overcome limitations through custom development. By tailoring Zoho Inventory to WishMed's specific needs, we enabled them to achieve a more efficient and reliable inventory management system.**



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