



RELEVATE

LIFT | RAISE | LIGHTEN



Case Study

DMD Coffee – CRM | Inventory | Sign |
Creator | Xero Integration

THE CHALLENGE

DMD, a Melbourne-based coffee retailer, supports cafés by leasing essential equipment such as espresso machines and grinders, while also roasting and supplying coffee beans. Their leasing program included monthly rebates for café partners, but the entire process was managed on an outdated DOS-based system inherited from the previous owner. Staff relied on DOS to track contracts and rebate agreements, while using Xero separately for accounting. This patchwork approach created inefficiencies, manual handling, and errors. On top of this, café owners were forced to place orders for consumables like beans, cups, and syrups by email or phone, which slowed down operations and created room for mistakes. DMD also managed multiple coffee brands under their umbrella, each requiring a unique customer experience something their old system could not support. The business needed a modern, automated platform to manage contracts, inventory, and multi-brand customer ordering seamlessly.

THE SOLUTION

Relevate replaced the legacy DOS setup with a customised Zoho ecosystem. Zoho CRM was introduced to manage leasing contracts, automate rebates, and handle the full sales process from enquiry to signed agreement through Zoho Sign. Zoho Inventory was implemented to manage roasted coffee beans and consumables, with integration to Xero ensuring accounting continuity.

Relevate gave us a modern, branded ordering system and replaced our outdated processes. Our cafés now have a streamlined way to order, and our contracts and rebates are finally automated.

- DMD

To modernise ordering, Relevate built a customer portal in Zoho Creator that allows café owners to log in, view their brand-specific catalogue, and place orders online. The portal automatically filters products by brand, ensuring each café only sees the beans and consumables relevant to them. This not only eliminated manual emails and phone calls but also gave cafés a professional, user-friendly ordering experience that aligned with DMD's multiple brands.

THE OUTCOME

DMD now runs on a modern Zoho platform that has replaced their outdated DOS system and transformed how they work with cafés. Contract management is automated through Zoho CRM, rebates are tracked accurately, and proposals and agreements are signed digitally. With Zoho Inventory integrated into Xero, stock management and accounting are seamlessly aligned. Most importantly, the new Zoho Creator customer portal has eliminated manual phone and email orders. Café partners can now log in, see the right brand catalogue, and order beans and consumables online with confidence. This ensures brand integrity, reduces errors, and saves staff hours of back-and-forth communication. DMD is now positioned to scale its operations, manage multiple brands under one system, and deliver a far better experience to its café customers.



**Contract
Management**



**Customer
Portal**



**Inventory
Integration**



**Multi-Brand
Ordering**

This project demonstrates how Relevate helped DMD replace a legacy DOS system with an integrated Zoho solution. By automating contract management, linking inventory with accounting, and introducing a brand-specific ordering portal, Relevate eliminated inefficiencies and modernised the entire customer experience. The result is a streamlined, scalable system that allows DMD to focus on growth while delivering better service to its café partners.



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