



AUTOMATE · INTEGRATE · SCALE

# Your Business, Unified on Zoho

with **OCTFIS TECHNO LLP**

A Zoho Premium Partner helping organizations automate sales, finance, inventory, HR, and operations through custom Zoho architecture and integrations.

**2016**  
ESTABLISHED

**Premium**  
ZOHU PARTNER

**5 Offices**  
INDIA & CANADA

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*"We automate sales, finance, inventory, HR, and operations through custom Zoho architecture and integrations – so our clients run their entire business on one connected platform."*

## 01 About OCTFIS

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**OCTFIS TECHNO LLP** is a Zoho Premium Partner specializing in the design, implementation, and customization of cloud-based business systems built on the Zoho platform. Established in 2016 and headquartered in Surat, India, the firm has spent nearly a decade helping organizations replace fragmented tools and manual processes with a single, connected operating system.

Our work spans the full Zoho ecosystem — from CRM and finance to inventory, HR, projects, and field operations — unified through deliberate architecture, custom development, and third-party integration. We are recognized as a **Premium Partner of the Zoho Finance Suite**, a distinction earned over years of disciplined delivery and deep product expertise.

With delivery teams across four cities in India and a branch in Canada, OCTFIS combines the cost-efficiency of an offshore engineering practice with the accountability of a partner who owns outcomes end to end.

**10+**

Years as a Zoho Partner

**30+**

Zoho Applications Deployed

**15+**

Documented  
Implementations

**5**

Offices Across 2 Countries

**17+**

Custom Modules Built

**20+**

Published CRM & Books Add-Ons

### Our Mission

To help businesses operate as one connected system — removing silos between departments and giving leaders real-time visibility from a single source of truth.

### Our Approach

We start with the business problem, not the software. Every engagement is led by certified consultants who design, build, and support solutions tailored to how each client actually works.

## 02 Our Zoho Partnership

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### PREMIUM PARTNER — ZOHO FINANCE SUITE

Achieving the title of Premium Partner of the Zoho Finance Suite in a short span of time remains one of our proudest milestones — a recognition of consistent delivery, product depth, and the trust of the clients we serve.

As an accredited partner, OCTFIS operates inside Zoho's official partner program with direct access to product roadmaps, certified training, and escalation channels. Our consultants hold Zoho certifications across the suite, and our developers build on Zoho's native frameworks — Deluge, the Developer SDK, and the marketplace extension platform.

#### Certified Consultants

A team of Zoho-certified implementation specialists guiding every engagement from scoping to go-live.

#### Add-On Specialists

A dedicated R&D practice publishing custom modules and marketplace extensions for industry-specific needs.

#### Finance-Suite Depth

Premium-level expertise across Books, Inventory, Billing, and Expense for complex financial operations.

#### Direct Zoho Access

Partner-level support and escalation channels that keep client deployments moving without delay.

## 03 What We Do

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From first consultation to long-term support, OCTFIS delivers the full lifecycle of a Zoho deployment. Our services fall into six core areas.

### 01 Consulting & Requirement Analysis

We map your processes, pain points, and goals before recommending a solution — ensuring the platform fits the business, not the other way around.

### 02 Implementation & Configuration

Hands-on setup, workflow automation, and role-based configuration across the Zoho applications your operation needs.

### 03 Custom Development

Bespoke modules, marketplace add-ons, and Deluge automations that extend Zoho to meet industry-specific requirements.

### 04 Integration & Migration

Connecting Zoho with third-party systems — Tally, IndiaMART, payment gateways, WhatsApp — and migrating data safely from legacy tools.

### 05 Training & Adoption

Structured user training and knowledge transfer that turn a new system into daily habit across your teams.

### 06 Managed Support & Services

Ongoing administration, enhancements, payroll, accounting & bookkeeping, and analytics — keeping your platform healthy long after go-live.

## 04 Zoho Products We Implement

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We work across the entire Zoho suite — and with Zoho One, we unify it all under one login, one data model, and one bill. Below is a representative map of the applications we deploy.

### SALES & MARKETING

CRM · RoutelQ · SalesIQ · Marketing  
Automation · Campaigns · Social · Commerce ·  
Forms

### FINANCE

Books · Inventory · Billing · Expense · Analytics  
· Procurement · Subscriptions

### OPERATIONS

Creator · Projects · FSM · Flow · POS · Catalyst  
· IoT

### PEOPLE & HR

People · Recruit · Payroll · Expense · Learn

### PRODUCTIVITY & SUPPORT

Mail · WorkDrive · Desk · Sign · Contracts ·  
Backstage

### ZOHO ONE

The complete operating system for business  
— every application above, integrated under a  
single platform.

## ERP

Need an end-to-end ERP? We architect Zoho into a connected enterprise resource platform spanning finance, inventory, manufacturing, and field operations.

## 05 Custom Modules & Add-Ons

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Where standard Zoho stops, our development practice begins. We build custom modules that solve real operational gaps and publish add-ons that extend CRM, Books, and Inventory.

### CUSTOM MODULES

|                    |                   |                  |
|--------------------|-------------------|------------------|
| Bill of Entry      | Bill of Materials | Auto PO Generate |
| Fleet Management   | Purchase Request  | Driver Sheet     |
| Item Warranty      | Loading Sheet     | Order Tracking   |
| Job Card & Jobwork | Tool Repair       | Barcode Printing |
| Cheque Printing    | QC Module         | SO Approval      |

### MARKETPLACE ADD-ONS & INTEGRATIONS

|                                     |                                          |
|-------------------------------------|------------------------------------------|
| IndiaMART Real-Time Leads for CRM   | TradeIndia Extension for CRM             |
| Exporters India Extension for CRM   | Google Address Autocomplete for CRM      |
| Auto Currency Exchange Rate Updater | City / State / Country GeoData Populator |
| Zoho Inventory → Tally Integration  | Zoho Billing → Tally Integration         |
| Dynamic PDF Templates for Books     | Fetch Leads from Google Sheets to CRM    |

*A selection from our published catalog of 20+ extensions on the Zoho Marketplace.*

## 06 Our Implementation Process

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Every engagement follows a structured, transparent path led by Zoho-certified consultants — designed to de-risk delivery and drive adoption.

### 01 Requirements Gathering

Capture business needs, project scope, user pain points, priorities, and expected outcomes.

### 02 Solution Design

Define architecture, workflows, modules, integrations, security, and the delivery blueprint.

### 03 Solution Implementation

Build, configure, customize, and validate the approved design across the platform.

### 04 Integrations

Connect APIs, external systems, third-party applications, data sources, and internal services.

### 05 User Acceptance

Validate the delivered solution with stakeholders and end users before rollout.

### 06 Migration to New Platform

Move data, processes, and users from the old platform to the new environment safely.

### 07 Training & Ongoing Support

Enable adoption with user training, knowledge transfer, issue support, and continuous improvement.

## 07 Industries We Serve

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Our industry-specific modules and cross-sector experience mean we arrive understanding your operations — not learning them on your time.

### **Ceramic & Vitrified**

Real-time finance, inventory, and analytics for high-volume manufacturers.

### **Pharmaceuticals**

Automated lead-to-invoice workflows and export operations.

### **FMCG & Trading**

Mobile-first field productivity and tighter financial control.

### **Manufacturing & Engineering**

BOM, job cards, QC, and shop-floor workflows on Zoho.

### **Retail & Furnishings**

Order, payment, and inventory visibility with less manual work.

### **Telecom & Technology**

Scalable automation and data-driven decision-making.

### **Media & Film Production**

Secure, digitized production workflows end to end.

### **Construction & Renovation**

Project management, multi-level quoting, and sales digitization.

## 08 Selected Case Studies

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### **Simero Vitrified Pvt. Ltd.**

**CERAMIC**

A centralized digital backbone delivering real-time visibility across finance, inventory, and analytics.

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### **GNH India Pharmaceuticals Ltd.**

**PHARMA**

Automated lead-to-invoice workflow that reduced response times and improved export operations.

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### **Asphalt Syndicate LLP**

**ZOHO ONE**

A centralized Zoho One platform connecting sales, finance, HR, and operations.

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### **Paras Trading Corporation**

**FMCG**

A mobile-first Zoho-powered solution improving field productivity and financial control.

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### **SP Cinecorp Cinematic Venture Ltd.**

**MEDIA**

Digitally transforming film production workflows with a secure Zoho ecosystem.

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### **T-Dot Group**

**TELECOM**

Enabling scalable automation and data-driven decision-making for telecom services.

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### **Magic Reno**

**RENOVATION**

Digitizing sales, project management, and multi-level quoting for a leading renovation company.

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## 09 What Our Clients Say

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*"We have been associated with OCTFIS for the past three years. They streamlined and implemented our internal processes using Zoho Finance with excellent support."*

**Simero Vitrified Pvt. Ltd.**



*"With their support we successfully implemented Zoho One along with CRM, Books, Inventory, and People. A smooth and positive experience throughout."*

**Aditya Laces**



*"We highly appreciate the support of the team and would recommend them to any company looking for a smooth Zoho implementation and a dependable service partner."*

**Studio Sairish**



*"OCTFIS provided complete Zoho solutions including Books, People, and Payroll, with smooth implementation and ongoing support for our business."*

**The Kazo**

## 10 Why Choose OCTFIS

### Premium Partner Credentials

Recognition as a Premium Partner of the Zoho Finance Suite — a mark of proven delivery and product depth.

### In-House Development

Our own R&D team builds custom modules and marketplace add-ons — capability most partners outsource.

### Industry-Specific Expertise

Purpose-built modules for manufacturing, trading, pharma, and more — not generic configurations.

### End-to-End Ownership

One accountable partner from requirements through migration, training, and long-term support.

### Global Delivery

Teams across four cities in India and a branch in Canada — cost-efficient delivery with real accountability.

### Proven Track Record

A documented portfolio of implementations and consistently five-star client reviews across sectors.

## Ready to unify your business on Zoho?

Book a free consultation with our certified consultants and see how a connected platform can transform your operations.

[Book a Free Consultation — www.octfis.com](https://www.octfis.com)

## 11 Get in Touch

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