IMPLORIS

OPTIMIZING PROCESSES, MAXIMIZING RESULTS

A PRACTICAL GUIDE FOR MSME MANUFACTURERS

Zoho for Manufacturing

Connecting sales, inventory, production, quality and finance with better business systems.

A practical starting point for manufacturers who want more visibility and control without taking on unnecessary system complexity.

IMPLORIS | Optimizing Processes, Maximizing Results

Start with the way your factory works

Manufacturing teams can work hard and still spend too much time chasing updates. Sales may live in WhatsApp, stock records in spreadsheets, production updates in calls or voice notes, and finance may receive information only after the fact.

The issue is not always a lack of software. Often, the bigger problem is that information is recorded in different places, responsibilities are unclear, and teams cannot see the same version of what is happening.

A useful business system should help answer five everyday questions:

- **Orders:** What has been promised, and what is due next?
- **Materials:** What is available, allocated, short, or waiting for purchase?
- **Production:** What is in progress, delayed, completed, or sent for outside processing?
- **Quality:** What has passed inspection, and what needs rework or approval?
- **Finance:** What has been delivered, billed, collected, or left outstanding?

> **The guiding principle**
>
> Technology should follow the process—not force the business into a workflow that does not fit.

What a connected flow can look like

ENQUIRY	ORDER	MATERIALS	PRODUCTION	DISPATCH & BILLING
Lead, quote, customer requirements	Confirmed order and dates	Availability, purchase, issue	Work stages, WIP, QC, job work	Delivery status, invoice, payment

What Zoho can cover

Zoho offers a set of connected business applications. The right starting point depends on your processes, team size, current tools, and the level of control you need.

BUSINESS NEED	POSSIBLE ZOHO ROLE	WHAT TO CLARIFY
Sales and customer follow-up	Zoho CRM; SalesIQ or Campaigns where relevant	Lead stages, quotations, follow-ups, customer history
Inventory and orders	Zoho Inventory; links with Zoho Books where appropriate	Items, warehouses, stock movements, order status
Finance and billing	Zoho Books; Invoice or Payroll if needed	Accounting rules, tax setup, billing, collections
People operations	Zoho People or Recruit where relevant	Whether HR workflows are in scope now
Production-specific workflows	Zoho Creator for carefully scoped custom applications	Work orders, stages, job work, QC, material issue, costing
Management reporting	Zoho Analytics or reports in the relevant apps	Which decisions and KPIs managers need to see

Use standard capabilities first

Where an existing application already handles the process well, start there. Customisation should be reserved for genuine gaps, not used simply because it is possible.

Examples of manufacturing-specific gaps that may need a designed workflow include:

- Stage-wise work-in-progress (WIP) tracking
- Outside processing or job-work movements
- Material requisition and issue against a job
- Quality checkpoints, rework and approvals
- Production updates from vendors or subcontractors
- Costing and consumption rules specific to the business

How the pieces can fit together

A practical architecture connects the core records first, then adds manufacturing workflows where the standard applications do not fully match the real process.

CUSTOMER & SALES
Enquiries • quotations • confirmed orders • customer commitments
INVENTORY & FINANCE
Items • stock movements • purchasing • invoices • collections
PRODUCTION WORKFLOWS
Work orders • stage updates • material issue • job work • QC • dispatch readiness
MANAGEMENT VISIBILITY
Order status • material shortages • WIP • delays • quality exceptions • profitability indicators

Design around the handoffs

The most important design work often happens between departments: sales to planning, planning to stores, stores to production, production to quality, and dispatch to finance. For each handoff, decide what information must be recorded, who owns it, when it is updated, and who needs to see it.

A dashboard cannot fix missing or inconsistent data by itself. First define the event, record, owner and rule; then build the report that makes the information useful.

> **A practical test**
>
> Can a manager answer “What is delayed, why, and who owns the next action?” without calling three people and reconciling multiple spreadsheets?

ERP, Zoho, or a custom system?

The choice is not simply between a large ERP and a small app. It is about matching the business process to the right level of structure, while keeping ownership and maintenance manageable.

OPTION	CAN BE A GOOD FIT WHEN…	WATCH OUT FOR…
Standard ERP	Processes are reasonably standard and the business needs established manufacturing functions.	Implementation effort, process fit, complexity, adoption and ongoing support.
Standard cloud business apps	The business wants to start with sales, inventory, orders and finance using configurable tools.	Do not assume standard apps cover every production, job-work or costing requirement.
Custom or low-code applications	A specific workflow is important and is not handled well by standard tools.	Poorly scoped customisation, unclear ownership, testing, documentation and maintenance.
Hybrid approach	Core applications cover common processes and a limited custom layer handles genuine gaps.	Integration design, data consistency, security, and responsibility for support.

Before choosing, assess these six factors

- **Process fit:** Can the system represent your actual workflow and exceptions?
- **Visibility:** Can people see order status, shortages, WIP and delays in time to act?
- **Adoption:** Can the team use it reliably with practical training?
- **Total cost:** Include licences, implementation, data migration, integrations, support and future changes.
- **Control:** Clarify access, approvals, backups, audit trails and data ownership.
- **Change over time:** Who maintains the solution as products, workflows and staff change?

When Zoho may—and may not—be the right fit

Zoho can be a practical option for businesses that want connected customer, inventory and finance processes, with custom workflows added selectively. Fit should be verified against actual requirements before making a commitment.

Signs it may be worth evaluating

- Teams rely on WhatsApp, spreadsheets and separate applications for operational updates.
- The business wants clearer order, stock, production or billing status.
- A phased rollout is preferable to a large, disruptive implementation.
- Standard applications cover much of the need, but a few workflows require extension.
- The team can agree on common definitions, responsibilities and data-entry rules.

Requirements that need closer validation

- Advanced material requirements planning (MRP), detailed BOM explosion or complex production scheduling.
- Highly complex routing, costing, yield, scrap or capacity-planning rules.
- Strict industry-specific traceability, regulatory or quality requirements.
- Extensive offline shop-floor operation, machine integration or specialised controls.
- Large-scale multi-site operations with complex intercompany processes.

Do not decide from a feature list alone

Map one real order from enquiry through production, material consumption, quality, dispatch and billing. Test the exceptions as well as the happy path.

A phased path to implementation

01 UNDERSTAND	02 DESIGN	03 PILOT	04 EXTEND
Map the current workflow, pain points, data and owners.	Agree on records, statuses, approvals, measures and responsibilities.	Test a bounded workflow with real users and real examples.	Connect the next process only after the first is stable.

A factory systems checkpoint

Use this short checklist with your team before selecting software or planning an implementation.

CHECKPOINT	QUESTION TO DISCUSS	STATUS
Order visibility	Can we see every open order, promised date, current status and owner?	■ Yes ■ Partly ■ No
Material availability	Can we identify shortages and material already allocated to jobs?	■ Yes ■ Partly ■ No
Work in progress	Can we see where each job is, what is delayed and why?	■ Yes ■ Partly ■ No
Outside processing	Can we track what was sent to a vendor, what is expected back and what was received?	■ Yes ■ Partly ■ No
Quality	Are inspection results, rework and release decisions recorded against the right job or batch?	■ Yes ■ Partly ■ No
Cost and consumption	Can we compare expected and actual material use and identify meaningful variances?	■ Yes ■ Partly ■ No
Dispatch and billing	Can delivery, invoicing and collection status be reconciled without manual chasing?	■ Yes ■ Partly ■ No
Management view	Do managers have a small set of trusted indicators that support action?	■ Yes ■ Partly ■ No

Your next step: review the workflow before the software

A short operations review can help identify the process gaps that matter most, distinguish configuration needs from genuine customisation, and define a sensible first phase. It should produce clarity on priorities—not a premature software commitment.

Manufacturing Operations Review

Discuss your current process, the visibility gaps that slow decisions, and a practical path toward connected operations.

Imploris

Business Systems & Operations Consulting for growing businesses. We help structure processes, connect systems, and improve operational visibility and execution.

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This guide is for general information and planning. Application capabilities, licensing, integrations and suitability should be validated against current product documentation and the specific requirements of each business.