CASE STUDY

Maa Dayalu Fertilizers Pvt. Ltd.

Digital Transformation of Dealer Sales, Distribution & Incentive Management

INDUSTRY	Agriculture Inputs & Fertilizers
BUSINESS MODEL	Manufacturing, Distribution, Dealer Network & Field Sales
CORE PLATFORMS	Zoho CRM, Zoho Books, Zoho Inventory, RouteIQ
EXTENDED ECOSYSTEM	Zoho People, Zoho Payroll, Zoho Expense, Zoho Recruit & Deluge

One connected platform for sales, finance, inventory, field operations, HR and dealer incentives.

1. Overview

Maa Dayalu Fertilizers Pvt. Ltd. is a growing manufacturer and distributor of fertilizers, micronutrients, plant growth regulators, and agricultural inputs. Its operations span dealer and distributor management, field sales, inventory, finance, employee administration, and incentive programs.

As the business expanded, critical activities were managed through spreadsheets and disconnected systems. The implementation brought these functions together in a unified Zoho ecosystem, using configuration, approval workflows, reports, integrations, custom modules, and Deluge-based automation.

Key takeaways

- Centralized dealer, customer, farmer, and sales information in Zoho CRM.
- Connected customer records with finance operations in Zoho Books.
- Standardized product, packaging, unit-conversion, and warehouse processes in Zoho Inventory.
- Digitized territory-based field sales planning through RouteIQ.
- Automated quarterly cash discounts and annual dealer incentive calculations, including validations and Credit Note generation.
- Digitized core HR, payroll, expense, and recruitment processes.
- Improved operational visibility through standardized reports and dashboards.

2. Executive Summary

Maa Dayalu Fertilizers Pvt. Ltd. operates in the agriculture inputs and fertilizers sector, serving a dealer and distributor network while coordinating sales representatives across multiple territories. Its business model requires reliable customer records, accurate inventory data, coordinated field activity, compliant financial processing, and transparent dealer incentive calculations.

Before the transformation, the organization relied on separate spreadsheets and manual steps for customer onboarding, lead management, inventory handling, payment tracking, GST configuration, cash discount calculations, and annual dealer incentive schemes. The most complex workflows involved product-wise quantities, payment eligibility, bonus slabs, point redemption, GST, and Credit Note preparation.

A connected Zoho platform was implemented across CRM, finance, inventory, field sales, HR, payroll, expenses, and recruitment. Deluge custom development and business-rule automation were used where standard configuration alone did not cover the organization's requirements.

Dealer & Customer Management → Sales & Field Operations → Inventory & Finance → Incentive Automation → HR & Workforce Operations

3. Business Overview

Industry: Agriculture Inputs & Fertilizers

Business model: Manufacturer, distributor, dealer network, and field sales operations

The organization manages a range of interdependent stakeholders and operational functions:

- Dealers and distributors
- Farmers and end customers
- Sales representatives and territory teams
- Warehouse and inventory operations
- Finance and accounting
- Payroll, employee expenses, and HR administration

4. Business Challenges

Before automation, operational data and workflows were spread across multiple spreadsheets and systems. The principal challenges were grouped by business function.

4.1 Sales & Customer Management

- Customer records maintained in multiple spreadsheets.
- Manual dealer onboarding and no centralized customer hierarchy.
- No structured lead management process and limited visibility into sales activities and customer relationships.

4.2 Field Sales

- Sales representatives planned routes manually.
- Dealer visits were difficult to monitor consistently.
- Travel routes were not optimized.
- Managers had limited visibility into field activities.

4.3 Inventory & Warehouse Operations

- Complex fertilizer and agricultural-input item structures.
- Packaging materials mixed with saleable items.
- Product grouping inconsistencies and unit-conversion challenges.
- Warehouse stock visibility and product-category reporting gaps.

4.4 Finance

- Manual GST configuration and payment tracking.
- Manual Credit Note preparation.
- Manual discount calculations and transaction follow-ups.

4.5 Dealer Incentive Management

The most complex business process involved two schemes:

- Quarterly Cash Discount
- Annual Dealer Incentive Scheme

Both schemes required extensive spreadsheet-based calculations across product-wise quantities, payment validation, bonus calculations, redemption logic, GST computation, and Credit Note preparation. These multi-step calculations created a strong need for standardized rules, validation, traceability, and repeatable processing.

5. Project Objectives

- Centralize customer, dealer, distributor, and farmer information.
- Automate finance and inventory operations.
- Digitize field sales planning and activity visibility.
- Eliminate spreadsheet-based dealer incentive calculations.
- Automate Credit Note generation and related references.
- Improve operational and financial reporting.
- Strengthen role-based access, validations, and approval controls.
- Build a scalable platform to support future business growth.

6. Evaluation & Solution Architecture

The evaluation focused on gaps between customer and dealer data, field sales, inventory, finance, incentive calculations, and workforce administration. The solution was designed as an integrated Zoho ecosystem, with each platform supporting a defined business function. Zoho Recruit supported recruitment processes, while Deluge custom development covered specialized business rules and automation.

Business Function	Platform / Capability
Customer & Dealer Management	Zoho CRM
Inventory & Warehouses	Zoho Inventory
Finance & Accounting	Zoho Books
Field Sales & Route Planning	RouteIQ
HR & Attendance	Zoho People
Payroll	Zoho Payroll
Employee Expense Management	Zoho Expense

7. CRM Implementation

Zoho CRM became the central platform for customer, dealer, distributor, farmer, and sales information. The configuration was tailored to reflect the company’s customer data structure, territories, approval hierarchy, and access requirements.

- Lead module restructuring and customer data-format standardization.
- Farmer data import and customer field mapping.
- Territory management, reports, and analytics.
- Customer visibility hierarchy and parent-customer functionality.
- Quote approval hierarchy and user-access configuration.
- Duplicate prevention and customer search optimization.
- Synchronization of customer data with Zoho Books to improve consistency between sales and finance.

8. RouteIQ Implementation

RouteIQ was introduced to support field sales planning and provide location-aware access to sales information.

- RouteIQ user configuration and territory-wise assignment.
- Location-based invoice views.
- Filters for Madhya Pradesh and Chhattisgarh.
- Sales route optimization and dealer visit planning.

This enabled sales representatives to plan dealer coverage more systematically and gave managers improved operational visibility into field sales activities.

9. Inventory & Warehouse Automation

Zoho Inventory was configured to reflect Maa Dayalu's product catalogue, packaging needs, unit conversions, and multi-warehouse operations.

- Product grouping and variant management.
- SKU standardization and unit-group configuration.
- Unit conversions and packaging-material handling.
- Multi-warehouse and currency configuration.
- Inventory synchronization and composite-item configuration.
- Business logic configuration for inventory processes.
- Inventory reports and category-wise stock reports.

These changes established a more consistent item structure and supported clearer stock visibility across warehouses and product categories.

10. Finance Automation with Zoho Books

Zoho Books was configured as the financial backbone for accounting transactions, customer and vendor records, payment processes, and finance reporting.

- GST setup and Chart of Accounts configuration.
- Banking and payment-mode setup.
- Invoice configuration and transaction workflows.
- Customer, vendor, and item configuration/import.
- Workflow automation and payment reminders.
- Finance reporting and standardized transaction processes.

The finance team gained a more standardized digital workflow for transactions, GST-related reporting, payment follow-ups, and Credit Note processing.

11. Quarterly Cash Discount Automation

The Quarterly Cash Discount process was automated end-to-end to replace manual calculations and make the calculation and Credit Note workflow more repeatable.

- Synchronizes invoice and payment data, calculates payment days, and applies the cash discount policy.
- Calculates discount amounts and applicable GST, then generates Credit Notes automatically.
- Updates invoice references to maintain traceability.
- Generates calculation reports and item-wise PDF output.

12. Annual Dealer Incentive Automation

The Annual Dealer Incentive Management System was one of the most significant custom developments. It applies business rules to invoice quantities, collection performance, bonus slabs, payment eligibility, redemption, GST, and Credit Note creation.

The automated process includes:

- Reads invoice quantities and calculates base points.
- Calculates collection points and aggregates annual product quantities.
- Applies bonus slabs and calculates total points.
- Validates payment eligibility and applies late-payment deductions.
- Expires points where required by the scheme rules.
- Determines point-redemption value and calculates GST.
- Generates annual Credit Notes and updates participating invoice references.
- Produces detailed calculation reports and downloadable PDFs.

The resulting process centralizes the incentive calculation logic and improves traceability between invoices, incentive records, calculations, and Credit Notes.

13. HR & Employee Management

The implementation extended beyond sales and finance to digitize key workforce processes across Zoho People, Zoho Payroll, Zoho Expense, and Zoho Recruit.

- Attendance kiosk and multiple-user kiosk configuration.
- Leave policies and employee attendance processes.
- Payroll configuration and processing support.
- Employee expense policies, approval workflows, and reimbursements.
- Offer templates and employee onboarding.
- Recruitment process configuration through Zoho Recruit.

14. Business Rules & Custom Development

Custom validations and Deluge-based logic were used to support organizational policies and reduce inconsistent data or unauthorized process outcomes.

- Quote approval controls.
- Customer visibility rules and role hierarchy.
- Duplicate item prevention.
- Packaging-material exclusion from applicable saleable-item calculations.
- Negative-stock validation.
- HSN validation.
- Warehouse permissions and stock visibility controls.
- Payment validations for discount and incentive calculations.

These controls helped align system behavior with business rules and strengthened process governance across the connected platforms.

15. Reporting & Analytics

Operational and financial reporting was configured to improve visibility across sales, inventory, finance, and incentive workflows.

- Annual and Quarterly Discount Reports.
- Sales by Category and Category-wise Closing Stock.
- Receivables & Payables Aging and GST Reports.
- Profit & Loss, Balance Sheet, and Analytics dashboards.

16. Results Achieved

Business Area	Outcome
Dealer incentive calculation	Automated calculation workflow.
Quarterly Credit Notes	One-click generation.
Annual incentive processing	Automated with business validations.
Manual calculations	Significantly reduced.
Customer management	Centralized in Zoho CRM.
Inventory management	Product structure standardized.
Field sales	RouteIQ-enabled planning and tracking.
Finance	Integrated GST and Credit Note workflows.
HR operations	Attendance, payroll, and expenses digitized.
Reporting	Improved business visibility through reports and dashboards.
Audit trail	Linkage established between invoices, incentive records, and Credit Notes.

The results above describe operational outcomes based on the project information provided. Quantitative metrics such as time saved, percentage error reduction, or financial impact were not supplied and have therefore not been estimated.

17. The Transformation

BEFORE IMPLEMENTATION	AFTER IMPLEMENTATION
Spreadsheet-based records	Centralized Zoho CRM
Manual dealer onboarding	Structured customer hierarchy
Manual field route planning	RouteIQ-supported field planning
Manual discount calculations	Automated discount and incentive rules
Manual Credit Note preparation	Automated Credit Note generation
Disconnected inventory, finance & HR workflows	Connected finance, inventory & workforce workflows
Limited cross-functional visibility	Standardized reports and traceability

18. Conclusion

The Maa Dayalu Fertilizers Pvt. Ltd. implementation evolved into a comprehensive digital transformation program rather than a standalone software deployment. By integrating Zoho CRM, Zoho Books, Zoho Inventory, RouteIQ, Zoho People, Zoho Payroll, Zoho Expense, and Zoho Recruit with extensive Deluge-based customizations, the organization established a unified platform for sales, field operations, inventory, finance, HR, and dealer incentive management.

Complex manual processes—including annual dealer incentives, quarterly cash discounts, Credit Note generation, and inventory workflows—were automated through configurable business rules and centralized data. The implementation resulted in improved process consistency, stronger governance, enhanced operational visibility, and a scalable foundation for continued growth.

From Dealer Management to Incentive Settlement — One Connected Zoho Ecosystem.

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