



UPWISE PROFESSIONALS



Authorized Zoho ERP Experts



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ABOUT US

Upwise (ZOHO Authorized partner) is an US registered Enterprise SaaS automation provider for clients worldwide, and enabling them to digitally transform their business processes.

WHY US

- ◆ Foresight to analyze challenges & opportunities.
- ◆ Develop strategies, choose apps and implement a solution that works best for the business model.
- ◆ Experience in various domains.

OUR MISSION

A well designed rules-driven business process automation is a must for an enterprise to boost process efficiency and improve customer, employee experience. Upwise is a partner, for SMBs in various business and industry domains, to provide expert guidance and advice on SaaS transformation plans and design solutions that synchronize processes between different data handling systems.

WHAT WE DO

Develop custom CRM solutions, optimize CRM for better performance, build integrations with other services, develop marketplace extensions & more. With our native understanding of schemas, legacy functionalities, hierarchical tables, and APIs, we help identify and document CRM requirements, expand its capabilities, and design/ develop an automation solution that best fits the business' needs.

ZOHO AUTHORIZED PARTNER

From configuring apps to building custom integrations, our development is all inhouse.



Our process is Agile, iterative and adapts a feature-driven or Scrum development model to implement and deliver core features in shorter, frequent cycles.



DISCOVERY

Create a high-level map for project plan - the problem, opportunity, and solution. Identify the scope for development, changes in the process, and a draft for the implementation steps to meet the goals.



IMPLEMENTATION

Employ a combination of workflows, validations, multiplatform integrations, configuring access controls, scripting as per the design demands of automation requirements.



DESIGN

Identify workflows, integrations, automation requirements and refine design for approval



CONSULTATION

Focused on documenting the business process, pain points, challenges, operations, data flow. High-level understanding of the project followed through with a Discovery session to corroborate the summary .



SUPPORT

Upwise offers a single point of contact for multi-apps service and maintenance solution for level of support (basic to expert). We also offer service as a renewable contract, customized in all areas of ranging from bug fixes/patch to feature development.



CRM

- ZOHO
- HubSpot
- Monday.com

E-COMMERCE

- WooCommerce
- Shopify
- Magento

WEBSITES

- ZOHO Sites
- Wordpress
- Hubspot

INTEGRATIONS

- Sales and Marketing (MailShake, People Data Labs)
- Team collaboration tools (Microsoft Teams).
- Customer engagement apps and live chat (SalesIQ, DialogFlow)

Align sales and enterprise data - inventory, shipments and invoices – directly into CRM. An integration with ERP allows for better planning of procurement and manufacturing demand.

ERP

- SAP
- Microsoft Dynamics

REST API

- Payments Gateways
- Google API
- Microsoft Azure API
- Graph API

INNOVATIVE SOLUTIONS

FOR SMALL BUSINESSES



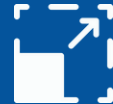
Efficient



Consistent



Integrated



Scalable

CRM FOR GENERAL CONTRACTORS

Enhanced with powerful integrations

A CRM solution build on ZOHO One that automates and optimizes work by using scalable logic as the key to success. Quickly identify opportunities and provides sales team a platform that can be used with little or no training and analyze their performance to take better-informed decisions. Get in touch to get a free consultation!

CORE FEATURES

- Manage Prospects and Customers
- Communications management
- Schedule management
- Generate and track proposals
- Send invoice and track payments
- Email Marketing
- Monitor growth and business insights

CRM FOR HEALTH CARE SERVICES & PROVIDERS

Deliver coordinated services to Referrals

A CRM solution build on ZOHO One for health services and healthcare providers to optimize customer service. A complete HIPAA-compliant system designed to deliver informed and insightful resolutions for all patient and provider needs. Get in touch to get a free consultation!

CORE FEATURES

- Streamline Referral services
- Appointment - schedule and confirm
- Automate Docusign services
- Track invoices and payments
- Generate commissions
- Monitor growth and business insights

SUPPORT SERVICES

Upwise provides a portfolio of services to assist with maintenance, provide health checks aligned with expertise and support to guide and minimize business risk associated with CRM implementation. Our services are designed to maximize the performance of your system and reduce down-time.

We are an implementation and support consultant that will work closely with you to ensure that you get the most out of your ZOHO apps

WE OFFER

BASIC

Upwise offers a single point of contact for multi-apps service and maintenance solution. We offer this support for a renewable 3 months contract. By offering a standardized list of support services we are able commit significantly to monitor Key Performance Indicators (KPIs).

Set up | configurations | Profiles & Permissions | Data sharing | data validations | Help desk tickets follow-ups

INTERMEDIATE

Upwise provides access to a knowledgeable developer to trouble shoot and resolve problems. We adhere to confidentiality agreements to protect the integrity of your process and information. Our developers have extensive experience in identifying and resolving automations, especially integration and access to other third party systems. We offer this support for a renewable 4 months contract.

Basic + Chat Support | Data mapping errors / trouble shoot custom functions

ADVANCED

A high-value, aligned, context-based professional service to uncover problems, and identify opportunities for optimization. A programmer matches your implementation's configuration with established best practices. We have committed 6 hour response time to issues with high level severity. We offer this support for a renewable 6 months contract.

Intermediate support + on call Support | trouble shoot Reports & Dashboards



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A PRO PARTNER YOU CAN RELY ON



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WANT TO READ ABOUT SOME OF OUR
SOLUTIONS? [READ MORE](#)

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