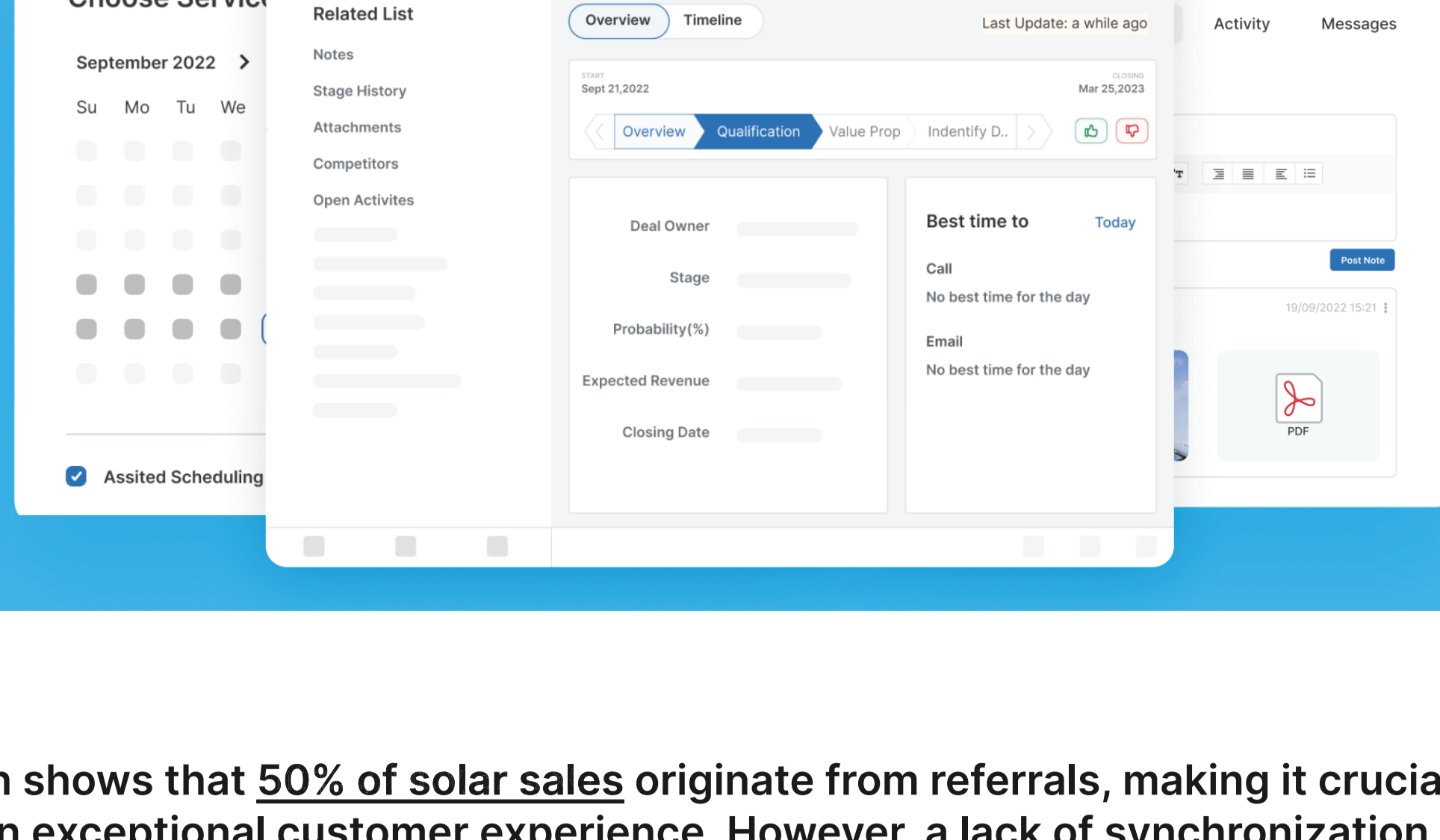


Enhance Your Customer Experience with the Combined Power of Zuper FSM and Zoho CRM



Research shows that **50% of solar sales** originate from referrals, making it crucial to deliver an exceptional customer experience. However, a lack of synchronization between your field and back-office teams can lead to operational challenges.

While a CRM platform can help manage customer details and ongoing communication, it falls short in managing scheduling conflicts and field workforce. Pairing your CRM with field service management software, like Zuper, can help eliminate manual redundancy, overcome scheduling issues, and keep everyone on the same page.

By **integrating Zuper with Zoho CRM**, you can automatically turn your contacts, deals, and leads into customers and jobs on Zuper. And you can quickly and easily schedule, dispatch, and handle your service operations directly from your CRM.

Here's how you can connect your Zoho CRM to your Zuper Field Service Management account and save hundreds of hours every year

Service request initiation

A customer contacts your solar business and requests a new solar panel installation.

You create a new deal using your Zoho CRM.

Move the deal to site inspection

After winning the deal, Zuper's two-way sync automatically converts the deal into a new site inspection request. It also assigns a field service technician and fetches customer details from Zoho CRM without duplication.

Schedule and dispatch

Zuper schedules and dispatches a field service technician for the site inspection. The inspection details, the work status, and captured pictures are entered by the technician via the mobile app, automatically reflecting in Zoho CRM.

Panel installation

Following an inspection by the field service technician and the needs assessment, the solar panel installation is approved. After approval, Zuper creates an installation job and assigns the right technician.

A new customer request

Let's assume the customer requests a new battery installation. Zuper adds the required battery part to the job details and instantly updates consumption in the Zoho inventory.

A new quotation

Zuper creates a quote with accurate details of services and parts and sends it to the customer instantly. The customer approves it, and it reflects in Zoho Books.

New battery installation

The field service technician starts working on the installation service and updates the work progress via their field service mobile app.

Invoice and digital payment

After installation, the technician uses Zuper to convert the quote into an invoice and sends a payment link to the customer. Once the customer makes the payment, it is automatically updated in Zoho Books.

Capture service details

The field service technician adds all service-related pictures and other notes through their field service app for reference, and it reflects in Zoho CRM.

Customer satisfaction

After the job is completed, the customer leaves a 5-star rating via Zuper's feedback link in response to the outstanding installation service provided by your team.