

# Opening the door to unique possibilities



We Do **Doors** 

 **MOBIX**

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# About Forth Windows



Based out of Scotland, Forth Windows & Doors offers bespoke doors and windows to their customers through their online store: "We Do Doors." Established in 2009, they started their operations by manufacturing custom doors and quickly grew from there. They began offering custom windows in 2012 and have only continued to expand.

In this ebook, we'll learn how Forth Windows & Doors digitally transformed their operations by using Zoho Creator

# The Problem

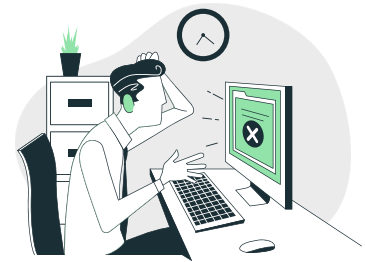
Forth Windows & Doors has had a classic SMB journey. For about a decade, they used a patchwork of cloud applications, legacy tools, and paper-based processes to manage their business. These different tools weren't integrated, meaning they wouldn't work together for business process workflows.



Reliance on traditional software



Scattered Information



Data errors due to use of paper forms

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As the company grew, we discovered that the use of paper was becoming more and more. This process was costing the company a lot of time and money.



**Sean Hardie**, CEO – Forth Windows & Doors

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Their solution at that time was to hire more employees to manage their elevated workloads. But they quickly realized that this method wouldn't be scalable, they needed a better solution.

In addition to scrambling to meet demand, Forth Windows & Doors had multiple databases of information scattered all over the company, making it a lot harder to track down the information they needed to function. They needed a single tool that would help centralize all that data and be accessible to every employee.

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If the data was easily accessible to everyone, it would help make the work go faster. That would not only improve the bottom line of the company, it would also help employees perform better.



**Sean Hardie**, CEO – Forth Windows & Doors

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Previously, they were using traditional tools and paper forms to capture some of their data, which often resulted in duplicated work and considerable data errors. This resulted in delays and sometimes even ordering the wrong components, meaning they also lost time re-ordering materials. Needless to say, this affected their delivery time to the customer and resulted in lower revenue.

Forth Windows & Doors needed a custom web-based solution to integrate the functionality of the traditional tools they were using and enabled them to scale business operations.

That's when they came across MOBIX, a Zoho partner. Forth Windows & Doors originally reached out for help adding a module to their CRM, but when MOBIX started to work on implementation, they realized that Forth Windows & Doors really just needed a custom-built solution to manage their operations.

To start with, MOBIX helped chart out the different processes in Forth Windows & Doors' business. Once the processes were clear, they introduced them to Zoho Creator, a custom app building platform. They provided a demo for Forth Windows & Doors where they showcased the power and flexibility of Zoho Creator.

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As soon as we saw this project, we realized that Creator was the tool to use. We used it to create a custom app based on what Forth Windows & Doors needed. The app brought together all the different databases that were present in the company. It seamlessly integrated with other Zoho apps such as CRM, Inventory and Desk.



**Thomas Soulier, CEO – MOBIX**

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# Where Creator Comes In

Based on Forth Windows & Doors' business workflow, MOBIX developed an application that currently manages their processes across sales, production, and logistics, and integrates with Zoho CRM. Now, all their different processes run on Creator and there's seamless data flow between CRM and Creator.

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Creator is the core of the application receiving order data from the website and passing it through the production process by exchanging and sharing with external vendors. This all took a long time pre-Creator with the need for quality checks and order processing right up to delivery to the client.



**Thomas Soulier, CEO – MOBIX**

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One of Forth Windows & Doors' lines of business is selling bespoke doors online. When a prospect visits their online store, they are greeted with multiple options to choose from. They can choose the door's design, material, lock, and color. In the backend, user choices are recorded in Zoho Creator. Then, data from the online store along with each user's contact details is captured as a lead in the system and sent to the sales team. The sales team then verifies the order by contacting the customer and attempting to finalize the sale.

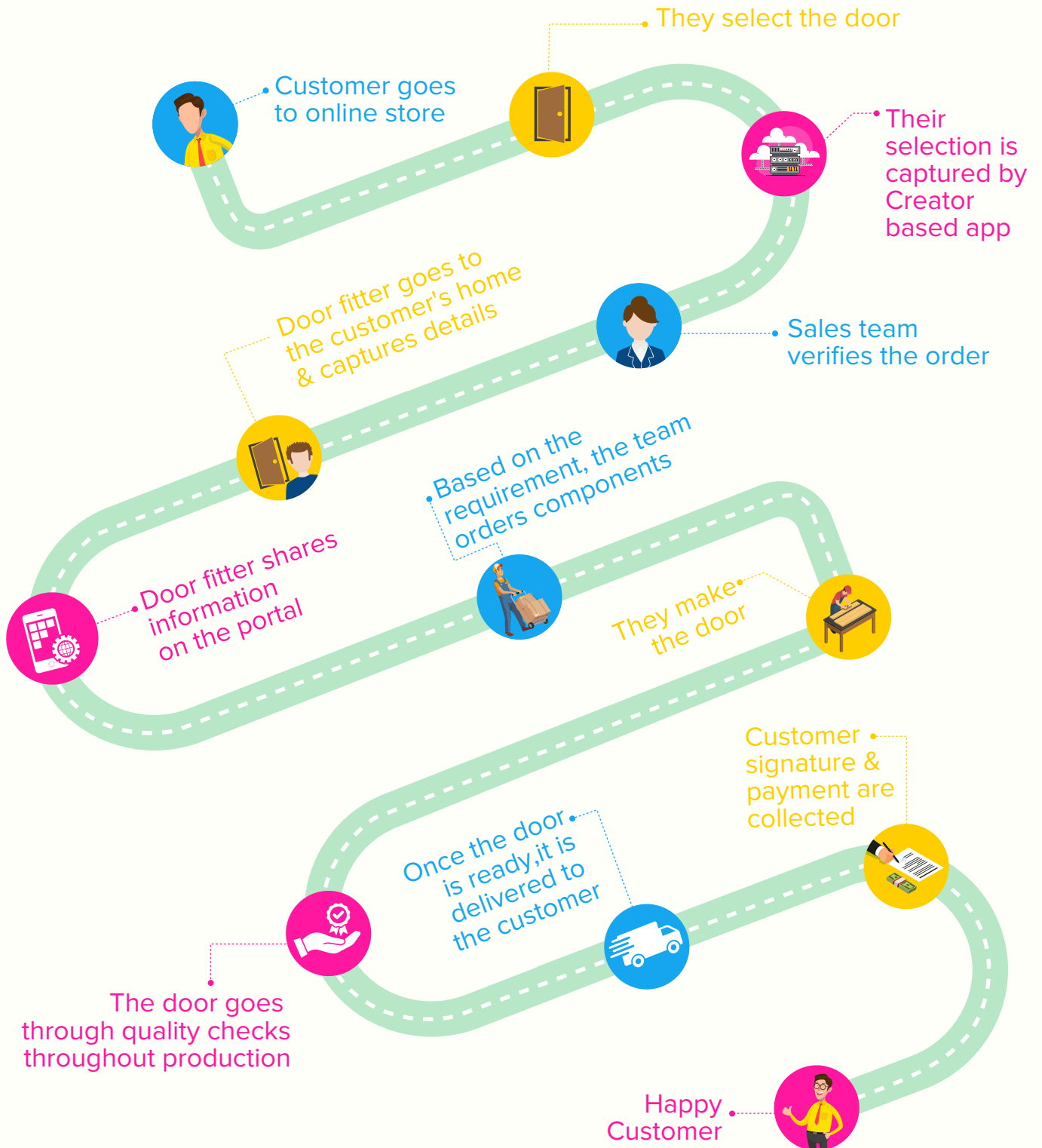
Once the sale is confirmed, they send a door fitter to the customer's address, where they capture details such as the door's location and dimensions. The door fitter, usually an external vendor, then uses an app they have on their phone, the mobile version of their Creator solution, to capture details about the door, take pictures of where the door will be located, and send that data to the main application using a portal designed specifically for them.

Once this information is submitted to the main Creator application, the production team can access it. The app is integrated with Zoho Inventory, which helps them evaluate and control stock. They proceed to order the components required to build the door based on each order. During the production cycle, the door goes through multiple quality checks, managed using that main Creator app. The app also integrates with Zoho Desk, which Forth Windows & Doors uses for quality control and tracking tickets when an issue is raised. The Creator app follows each door throughout the entire process until it is manufactured, capturing details of the doors at different stages of production.

When the door is ready, the driver delivers it to the customer. If the customer chose to get the door installed, the driver takes care of the installation, collects their signature using the mobile app, and the job is marked as complete.



# Customer Journey



# Benefits

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We're using this app to cover our processes across sales, production, and logistics. This has helped us streamline our workflows, which resulted in us saving about 40 hours of work per week. Now we are able to scale our business without having to hire more and more people.



**Sean Hardie**, CEO – Forth Windows & Doors

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Saving  
1800+ hours



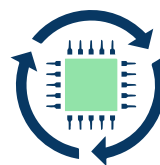
90% reduction  
in error



10% + rise  
in profit



Cost saving of  
£20,000



All of their processes  
are now digitized

Since the introduction of Creator, Forth Windows & Doors has seen instant business impact. From capturing external data directly into the Creator-based solution, to the ease of accessing real-time data from multiple users, this instant visibility has shown a rapid decrease in inquiry and order processing time.

Due to the manual nature of their prior solution, Forth Windows & Doors is expected to save 1800 -2200 hours over the next 12 months, and is already saving roughly 40 hours per week, freeing up that time to work on more impactful things. This is largely because they no longer have to input the same information manually four times, as now the data is directly added into the main system, even by the customer themselves in some cases. This has also resulted in an expected 90% reduction in errors over the next 12 months.

Thanks to the improvement in efficiency and productivity brought on by their Creator-based solution, Forth Windows & Doors anticipates an increase in revenue of 10 to 15% and an increase in profit of around £20,000 - £40,000. The company also expects to see a reduction in costs of £10,000 -£20,000.

Their Creator solution brought almost all of their processes online and built a robust task follow-up system. This allows Forth Windows & Doors' employees and consultants to operate from anywhere and have complete visibility into everything required. And beyond that, it allowed everyone to use a system that was built specifically for their process and their needs, and that will continue to grow with them and adjust to any future needs they may encounter.

## Looking Forward

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In the future, we plan to integrate Zoho Books, and add a digital signatures module to their app. This will involve adding a field named ‘Signature’ which can then be completed using a finger or a mouse. We also plan to add an order follow up module, with SMS integration.



**Thomas Soulier**, CEO – MOBIX

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MOBIX is currently working on adding two major features for the system. The first is a custom portal for Forth Windows & Doors’ drivers to give them access to intelligent route planning, which will display the shortest geographical route for each delivery.

Second, they’re planning to incorporate SMS-based alerts into the system so that customers can receive real-time notifications about the status of their order. And these enhancements are only the beginning—Forth Windows & Doors now knows there's no end to the possibilities with Zoho Creator, and they're looking forward to discovering future enhancements to increase efficiency and productivity.

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This year, we plan to scale our business up and become more profitable. We plan to do it by streamlining the remaining processes and bringing them into our app'. Doing so would've been hard without our association with MOBIX and Zoho.



**Sean Hardie**, CEO – Forth Windows & Doors

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## About Us

Running a business is no mean feat, and we believe we can help. At Zoho Creator, we've always worked towards a key purpose - enabling the citizen developer to build functional apps without having to learn to code. Rapidly build custom applications that are a perfect fit for your business, or choose from our extensive range of pre-built apps and modify them. Just sign up, pick a plan, and start building!

## Great brands trust us



## About MOBIX

MOBIX is a Zoho Advanced partner based out of France. They offer services such as Zoho implementation, platform training, and build Zoho app extensions for their customers across the globe.

To know more, visit their website - <https://mobix-group.com/>



[www.zoho.com/creator/](http://www.zoho.com/creator/)

**We'd love to talk! Reach out to us:**

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