

Oriental Equipments Trading Est., KSA



Case Study

Overview

Oriental Equipments Trading Est. struggled with fragmented financial processes, manual bookkeeping, and limited visibility across sales and inventory operations. With the implementation of **Zoho Books**, the company achieved unified financial management, improved accuracy, and seamless coordination between sales, purchases, and inventory.

Key takeaways:

- Centralized financial operations and reporting
- Enhanced accuracy in invoicing and expense tracking
- Improved visibility into project-based financials
- Automated workflows that reduced manual workload

Executive Summary

"Our business depends on timely supply, accurate billing, and seamless coordination between departments. We needed a system that brings everything together with complete reliability."

— Managing Director, Oriental Equipments Trading Est.

Oriental Equipments Trading Est., located in Dammam, Saudi Arabia, is a growing trading company specializing in **welding equipment, welding accessories, and materials** for both small-scale and commercial clients.

Location: Dammam, Kingdom of Saudi Arabia

Industry: Trading (Welding Equipment & Materials)

Employees: 05–10

Problem Statement and Key Challenges

Oriental Equipments managed its finances with conventional tools and partially manual processes, resulting in inefficiencies and operational bottlenecks.

- Lack of centralized financial oversight
- Manual invoicing led to delays and errors
- Difficulty in tracking project-based expenses and revenues
- Limited visibility of real-time financial performance
- Inefficient approval workflows

"Our finance and project teams were spending too much time reconciling data manually. We needed a system that could support our technical operations with equal precision in finance." – **Finance Manager, Oriental Equipments Trading Est.**

Evaluation of the Problem

The **Al Fahad IT Consulting** team conducted a detailed assessment of **Oriental Equipment's** workflows, existing pain points, and operational requirements. Through structured discovery sessions, we identified gaps in invoicing, expense management, inventory coordination, and financial reporting.

Our experts mapped out the end-to-end financial processes and evaluated integration points to ensure a smooth transition into **Zoho Books**.

Proposed Solution

To address these challenges, **Zoho Books** was proposed as the ideal solution due to its:

- Robust project-based accounting features
- Automated invoicing and recurring billing capability
- Streamlined expense tracking and approval workflows
- Customizable financial reporting tools
- Seamless integration with Zoho Inventory (optional expansion)

Key Features Leveraged:

- Project-based invoicing
- Automated workflows for approvals
- Custom templates for quotes and invoices
- Expense categorization and tracking
- Real-time dashboards and reporting

These features directly addressed **Oriental Equipments's** need for accuracy, scalability, and real-time financial visibility.

Implementation

The implementation was completed within **2.5 weeks**, including:

- System configuration tailored to project-based workflows
- Data migration of customers, vendors, items, and past transactions
- Customization of invoice and estimate templates
- Workflow automation setups
- Staff training for accounting and sales departments

Workarounds Delivered:

For areas requiring customization—such as specific welding material categories or unique pricing structures—we provided efficient workarounds and tailored configurations.

The implementation progressed smoothly, with all challenges resolved proactively through coordinated communication.

Result

Following the deployment of Zoho Books, **Oriental Equipments Trading Est.** experienced significant operational improvements.

Key Outcomes:

- **35% reduction in manual accounting work**
- **Faster quotation-to-invoice cycle** with 100% accuracy
- **Improved control over inventory levels**
- **Real-time financial insights**, improving decision-making
- **Enhanced supplier & purchase tracking**
- Better collaboration between sales and accounts teams

"Zoho Books has simplified our entire financial workflow. Everything is faster, more accurate, and much easier to manage—especially inventory and invoicing."

— **Managing Director, Oriental Equipments Trading Est.**

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📞 *Available on request*

Let's help you transform your trading business with Zoho. Schedule a consultation today!