

DocuBizz:

A Straight Line from Lead to Invoice with Zoho One





About DocuBizz

With a history dating back to 1968, DocuBizz is an experienced player in the software industry. Today, the company is owned by the Vitec Group and specializes in automated invoice processing and ERP integrations for the automotive industry—both within and outside Europe. According to COO Claus Carstensen, DocuBizz’s vision is as simple as it is unique: to deliver intelligent document management so customers can focus on their core business.

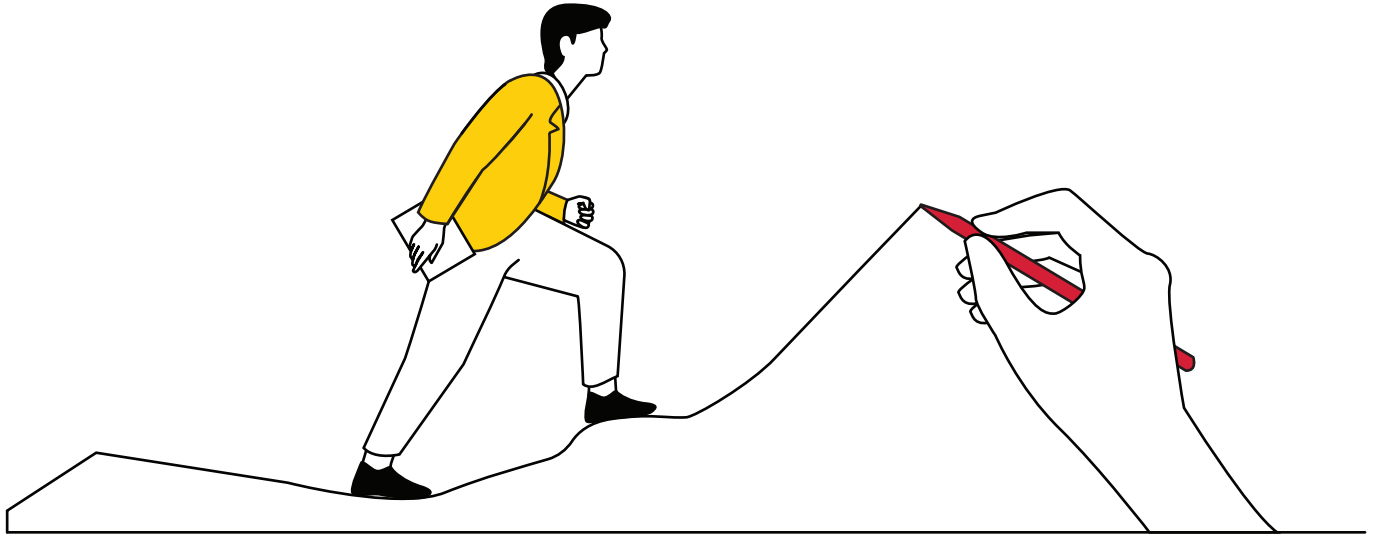


We often see that other vendors take a different approach. They set up the basics, but if the customer’s requirements deviate from the standard solution, the customer has to figure out how to match fields and values themselves. We’ve said: ‘That’s not something you should have to deal with—we’ll handle it for you. You can just contact our support, and we’ll take care of it.’

This focus on efficiency and proactivity for customers is also a central priority internally. Under Claus’ leadership, DocuBizz has moved from fragmented, manual administration to a streamlined, automated operation using Zoho.

Challenges

Growth vs. Manual Processes



When Claus joined as COO, one of his key priorities was to implement a CRM system. The company was facing several challenges, particularly in its sales process and in managing its approximately 800 customers.

Customer data and agreements were handled manually across email inboxes, Excel sheets, and Word documents. This created a fragmented setup with no clear overview and no single source of truth for customers and agreements.

- Lack of visibility into agreements and invoicing
- Risk of errors and missed follow-ups
- Internal uncertainty around responsibilities and processes

"Previously, an agreement could end up circulating across departments, where no one knew who was responsible—or whether anything needed to be done at all," Claus explains. "At times, customers were given access to a developer or support staff without going through sales. That created a lot of noise."

At the same time, a thorough review of existing customers and projects raised serious concerns: "When I went through everything, I discovered that many customers hadn't been invoiced at all for several years."

It became clear that the growing company stood to gain a lot by restructuring and supporting its internal customer management processes with technology.

Choosing Zoho

Affordability and Speed of Implementation

Claus has more than 10 years of experience with Zoho and, as COO in a compact organization, takes on a broad role across sales, marketing, business development, administration, and GDPR. This made the choice of CRM system relatively straightforward:

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Because I've worked with Zoho so many times before, I knew that once you get Zoho CRM, you'll typically start adding other tools quite quickly. At that point, it also makes financial sense to choose the Zoho One package. So that's what I did from the beginning.

In addition to its competitive pricing, Claus highlights the speed of implementation: "People expect it to take several months. I usually say I need two weeks." At DocuBizz, the process began by setting up the Accounts and Contacts modules in Zoho CRM. "It went quite smoothly—I think I was actually done within a week. And then we started from scratch."

Since the ERP system is managed by the Vitec Group, DocuBizz was able to avoid migrating historical agreements by linking to them from the CRM. This contributed to a fast and straightforward implementation.

Setup

A straight line from lead to invoice

DocuBizz's use of Zoho One is centered around its CRM system and sales process, which are further supported and streamlined through integrations with Zoho Sign and Zoho Campaigns.



CRM

DocuBizz primarily uses Zoho CRM's standard setup, which was a strategic decision for a company without established processes: "I actually think it's easier to structure ourselves as a company and do things the way Zoho CRM encourages."

However, a few adjustments have been made to adapt the system to a compact organization focused on speed and efficiency:



Leads

Leads are handled without using Zoho CRM's Leads module. Instead, they are sent directly from the website to Claus' email, where they are typically contacted within 30 seconds. Only when a lead is deemed relevant is it created in the CRM. This removes unnecessary steps and supports a fast sales process.



Offers module

DocuBizz operates with both recurring subscription payments and one-time payments for installation and training, which has required a customized version of the offers module. From here, quotes are generated automatically via mail merge, where customer data and prices are filled in without manual work.



Workflow notifications

When a quote is signed, the status in the CRM changes, which automatically triggers a workflow. This informs the relevant support staff about the agreement and the product and ensures that implementation is only initiated on the proper basis.



Sign

A seamless integration between Zoho CRM and Zoho Sign ensures that DocuBizz can send quotes quickly and efficiently, while also keeping track of what is outstanding.

The previously mentioned mail merge template in Zoho CRM is connected with Zoho Sign. When an offer is generated, it is sent to the customer with the click of a button in the CRM. The customer thus receives a custom-made quote with all details in record time, which can be signed digitally, ensuring that the signature is stored digitally and that DocuBizz knows which documents have been signed. When a customer has signed, Claus receives a notification from Zoho Sign, allowing him to change the status in the CRM to initiate the project.

Since DocuBizz records all customer data and agreements in its CRM system, the company now has a clear overview of the customer journey. This also supports daily task allocation and prioritization. “I can always generate lists if people lose track of what needs to be done. I just pull a report—boom, these customers are lined up and ready to be set up,” says Claus, who continues: “The same applies to finances. I can create a forecast showing our outstanding quotes, what has been signed, and what has been closed, so our finance department can reconcile everything, ensure the correct data is entered into our ERP system, and make sure we invoice what we should.”



The process is now completely streamlined. We don't start anything until an agreement has been signed. No one needs to engage with a customer before they've signed. The customer receives their quote, and we know exactly what needs to happen once it's signed. It's essentially a straight line from lead to invoice.



Campaigns

For marketing emails and other relevant customer communication, DocuBizz uses Zoho Campaigns. Zoho Campaigns allows DocuBizz to segment customer contacts from the CRM system and send targeted email communications to customers.

From January 1, 2025, both Denmark and Germany introduced new requirements for the digitalization of bookkeeping and invoicing. As DocuBizz is heavily involved in digitizing these processes, it was necessary at that time to inform both Danish and German customers about the new legislation. Claus explains: "Because we had such strong control over our CRM data—which we had spent about a year refining and improving—it wasn't an issue. I had my segments in place, so everything ran through Campaigns, and it just worked."

As the person responsible for GDPR compliance, Claus also uses Zoho Campaigns' reporting features to ensure that the right information has been received. "We had some customers who claimed they hadn't received any communication. In those cases, I could drill down into the data, find their email, and either say, 'No, that's correct—we don't have your email address,' or 'Actually, you did receive it, for example on Monday at 10 a.m., and I can also see that you haven't opened it. Check your spam folder or similar.' And, funnily enough, they would then find the email."

With Zoho One, DocuBizz has created a unified and automated process from lead to invoice, providing full visibility over customers and the sales pipeline. Automated workflows and clearly defined process steps have eliminated internal confusion, while integrations and automation have reduced manual work and made the sales process simple and efficient.

Partner - CRMzone

Sparring and resource management

Although Claus has many years of experience with Zoho and is able to set up a lot of things himself, DocuBizz also makes use of the Zoho partner CRMzone. Since 2011, CRMzone has helped both Danish and international companies with smart, customized setup and implementation of Zoho apps. They act both as developers and sparring partners, ensuring that their clients get the most out of the Zoho ecosystem.



For Claus and DocuBizz, the collaboration with CRMzone means quick responses to technical questions, help with development, and efficient allocation of resources. New, larger projects typically begin with a phone call:

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I usually call Karsten when I'm facing a challenge and say: 'Karsten, I'm about to send out these data processing agreements—what would you recommend, how should I do it?' The answer is: 'Yes, there are many ways to reach the goal.' And there are, which is good, because then we can talk about what I want to achieve.

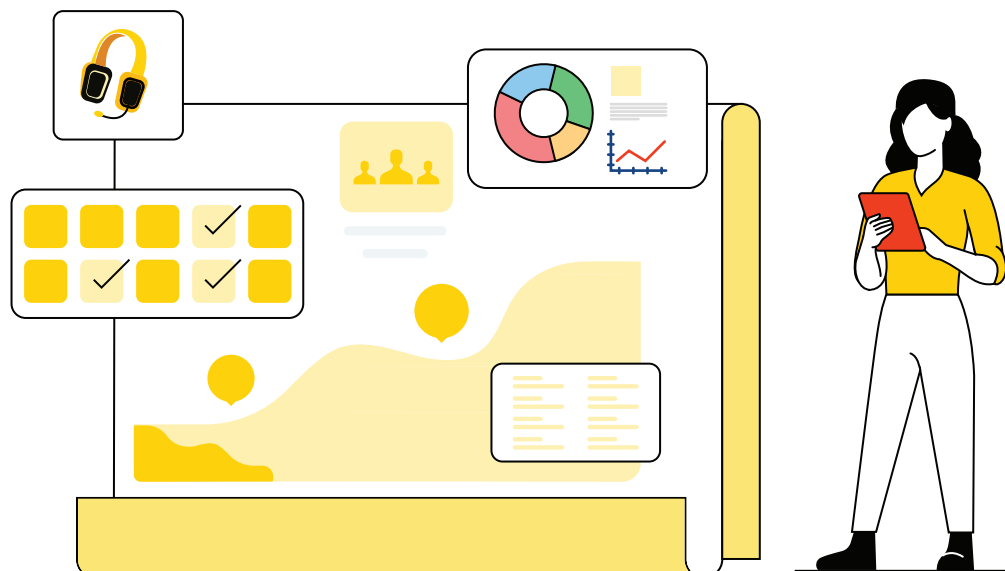
Depending on what the most optimal solution looks like, Claus then decides whether to implement it himself or have CRMzone do it. “They may have tried it before and seen different solutions to a similar problem, and then it’s better that they can quickly handle it in a couple of hours, rather than it taking me three days.”

Zoho Desk

Tickets with Complete Customer Overview

An ongoing project where CRMzone is assisting DocuBizz with implementation and solutions is the rollout of a new ticketing system. Today, DocuBizz uses a Norwegian ticketing system for collecting and handling support requests. Claus explains, “It’s fine, but it can’t do what we want it to do, so I’ve started setting up Zoho Desk.”

The goal with Zoho Desk is that DocuBizz employees should immediately be able to see all relevant customer information when opening a support ticket. This information should be pulled from Zoho CRM into Zoho Desk. The standard integration between Zoho Desk and Zoho CRM has been set up by Claus himself and allows for a lot, but it does not cover all the data points the team needs. These must be configured in the underlying code. “That’s going to be a challenge for me, because I haven’t tried that before,” Claus admits, and continues, “But CRMzone has done it many times before, so they can easily handle it.”



Zoho Mail

E-mail Failover as a Safety Net

A solution Claus has set up himself is a failover email inbox. The Vitec Group, which owns DocuBizz, uses Microsoft Outlook for email management. At DocuBizz, Outlook is integrated with Zoho CRM, so email details also flow into the CRM system, creating an overview. However, Claus is aware that Outlook exists outside the Zoho ecosystem.

“If Microsoft were to be shut down one day, or if the group headquarters were hit by a cyberattack, we would no longer have access to our emails,” Claus points out. To minimize the risk of potential business disruption, Claus has created a failover solution in Zoho Mail. This ensures that DocuBizz would still have access to customer communication if something unexpected were to happen.

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Conclusion

DocuBizz is a strong example of how a growing company with a compact team can transform manual and fragmented workflows into a unified, automated operation using Zoho. By centralizing customer data, standardizing processes, and integrating key tools, the company has built a solid operational foundation that both reduces errors and frees up time in day-to-day work.

Automation of key processes—from lead handling to quoting, signing, and invoicing—has not only created visibility but also made it possible to work more proactively and efficiently with both customers and the pipeline. At the same time, the simple setup ensures that the system supports the business without introducing unnecessary complexity.

The result is a scalable business where technology actively supports growth, and where DocuBizz can deliver a stronger customer experience—without increasing the burden on the organization.





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