

TPAC Packaging streamlines manufacturing with Zoho CRM



The company

TPAC Packaging. Thai Plaspac Public Company Limited, was founded in 1983 and specializes in manufacturing rigid plastic for packaging, including materials, containers, and plastic wares. They primarily serve the FMCG and pharmaceutical sectors. Headquartered in Bangkok, Thailand, TPAC operates 10+ plants and multiple production facilities across Thailand, India, Malaysia, and the United Arab Emirates. Their customer base spans leading ice-cream and dairy brands such as Nestlé and Amul, beverage and liquor companies, and other major global brands including Hershey, Coca-Cola, and Johnson & Johnson. TPAC started with a single injection-moulding machine in a rented space and gradually expanded, building their first manufacturing facility in Bangkok in 1987. Since then, they've steadily grown, opening new plants, acquiring additional production sites, and expanding their market across multiple regions.



The challenge



TPAC Packaging operates on two main types of business models: One is a repeat business model that serves existing customers with existing products, where orders are consistent or similar, and require simple approvals; the other model is a new product development (NPD), where the teams involved have to capture product specs, go through multiple approval processes, and run a 90-day project design, testing, customer approval, and bulk manufacturing hand-off. In order to accommodate both of these business processes, TPAC needed more than a standalone CRM; they needed an integrated suite of applications that could communicate seamlessly. Currently, each region uses different ERPs. India uses Tally, Malaysia uses SYSPRO, and Thailand and UAE use SBMS. The company's sales and operations teams did not have a CRM system in place— instead they relied heavily on spreadsheets and manual processes.

As the company grew, this process became unmanageable. They faced the following key challenges before adopting a CRM system: managing NPD and order fulfilment in Excel without a dedicated project management tool; handling support and compliance through manual or ad hoc methods; and communicating via Outlook and Teams without telephony integration or webforms. Additionally, they faced pricing discrepancies, over 20 quotation formats, and slow reporting—all of which created inefficiencies and hindered timely decision-making. Accordingly, the team wanted a centralized system to streamline everything and provide a single source of truth for their customer data.

- Lack of visibility into the sales pipeline
- Difficulty in tracking communication history with clients
- Missed follow-ups due to manual processes
- No structured way of measuring sales performance
- Gaps that created inefficiencies and slowed down teams' response times

The solution



TPAC first discovered Zoho through their sister company, which had successfully implemented Zoho with support from Yashuss Unlimited, a Zoho Premium Partner. In 2021, while exploring various CRM solutions to streamline their operations, TPAC evaluated several options and ultimately decided to move forward with Zoho.

To address their most significant pain points—such as not knowing how much they were selling, not having central control over new product development, and not being able to track project budgets, data, and time spent—they centralized everything in [Zoho CRM Plus](#) as their single source of truth.



“We evaluated several well-known CRM systems like Salesforce, MS Dynamics, and HubSpot, but what really stood out about Zoho was the perfect balance of features, flexibility, and affordability. Other CRMs were either too complex for our needs or too expensive. Zoho gave us exactly what we needed: a clean interface, strong automation, customization options, and seamless integrations—all at a very reasonable cost.”

Dhiraj Madan,

VP Global Digital Strategy, IT Head

TPAC implemented [Zoho CRM](#) as its central sales system, with region-specific layouts. While the overall process was similar across regions, there were still numerous nuances—such as compliance requirements, customer segments, audience types, and product variations—that needed to be handled differently in each region. Implementing this complex process required expert guidance, which is where a Zoho Partner—Yashuss Unlimited Team—played a crucial role. They worked closely and carefully with each regional team to set up their workflows in multiple phases, ensuring everything ran smoothly.

Zoho CRM setup

Four key teams at TPAC actively use Zoho CRM. First is the Marketing and Business Development team, who take the lead in finding and bringing in new customers. Next is the Key Accounts team, who stay in touch with existing customers to handle repeat orders and maintain relationships. Then comes the Customer Support team, who look after complaints and pricing discussions. Finally, there's the NPD team, which works closely with the Projects module as its primary touchpoint in Zoho CRM. Together, these four teams form the core group that uses Zoho CRM every day. The sales acceleration process at TPAC begins with inquiries they receive through multiple channels, including their website, referrals, walk-ins, emails, and a strong base of repeat customers. In certain regions, the sales team also visits customer offices to conduct inspections and surveys. If a customer's requirements match an existing product, TPAC's teams show samples, prepare quotes, and close deals quickly. Requirements for new products trigger the NPD pipeline, which involves specifications, drawings, and approvals from technical and product teams before returning to Zoho CRM for execution.

Sales process flow

When a customer approaches the TPAC team with a new requirement, the process usually begins with a plastic bottle used for reference. The customer provides input on dimensions such as length, width, and diameter, as well as other specifications, which often require significant customization. The team captures this information in Zoho CRM through a subform and shares it with the product team, who then check the request's feasibility and begin the design phase.

TPAC's new product development cycle can run anywhere from 30 to 90 days. During this period, the product team designs the prototype, develops a pilot batch, conducts testing and verification, and submits the results for customer approval. Once the customer gives the go-ahead, bulk production begins.

This entire workflow is managed in Zoho CRM, which serves as the central repository for product specifications and related details. Zoho CRM is tightly connected to **Zoho Projects** (which helps manage new product development timelines) and **Zoho Desk** (which they use to handle customer compliance requirements, including region-specific IDs). Together, these three systems form the backbone of their operations. Additionally, Zoho CRM is integrated with their ERP. Whenever they receive a purchase order, a sales order is generated in the CRM and automatically pushed to the ERP, ensuring real-time synchronization between the two systems.

Automation and customization across regions

While the core sales flow remains the same across regions, each market has its own rules. For instance, in Thailand, whenever TPAC had to revise a price or change a discount's validity, they had to close their existing Price Book and create a new one backed by a customer purchase order or quotation. In Malaysia, however, users could simply extend the validity within the same Price Book. Quote formats also varied so greatly that they had to create over 20 different quote templates across regions.



Dhiraj Madan,

VP Global Digital Strategy, IT Head

“With Zoho Price Books, we can manage all product pricing centrally and update rates instantly across regions. It’s saved us so much time and reduced errors.”

Lead module enhancements

To standardize lead management, the company configured approval workflows to match regional needs. They added a **custom function trigger** for two key fields:

- **Business type:**

Identifies customers based on the category they belong to — such as Bottles, Jars, Caps, Preforms, Consumers, etc.

- **Product type:**

Identifies the request as involving a new product, a custom design, an existing product, a duplicate product, or a redesign.

Additionally, they introduced **subforms** that collect shipment addresses (and help them manage multiple addresses per customer) and capture detailed product requirements, which vary across regions.

Deals module enhancements

When leads are converted into deals, automation ensures deal names are standardized. TPAC applied **Blueprints to the Deals module**, along with custom functions that handle regional fields, deal IDs, and quantities. These Blueprints map out every stage, from needs analysis and price list creation to item quote generation, negotiation, quote regeneration, and deal closure.

Quotation process

TPAC's Zoho CRM customizations enable sales users to create multiple quotations per customer, with the system automatically versioning them. However, only one quotation can be flagged as the **final, customer-approved version**. Once approved, all previous quotations are automatically voided to ensure consistency in both execution and reporting.

Blueprint-driven processes

Blueprints were designed to reflect the different scenarios TPAC manages, such as **existing products, NPD, and cost approvals**. For example:

- In the **Consumer Blueprint (India)**, the flow begins with a needs analysis, followed by price list and quote creation, negotiation, and deal closure. At each stage, transitions such as Regenerate Quote or Deal Lost are built in.
- In the **Existing Product - Costing Approved Blueprint (UAE)**, the flow includes a sample quotation, cost approval, negotiation, mandatory customer document uploads, deal closure, delivery, and final order completion. They've also added controls to ensure that deals can't be closed unless required customer documents are uploaded and approved.

TPAC also introduced a **master data approval workflow** so that whenever a new customer record is created, it can only be approved after mandatory documents are uploaded. Once approved, the record is locked from further edits to ensure compliance and data integrity. Through these customizations—which span lead, deal, and quotation management, as well as region-specific Blueprints— TPAC has established a scalable CRM system that streamlines processes, enforces controls, and accounts for regional variations. To streamline operations, they also leverage **assignment rules** to automate key processes and ensure consistency across pipelines.

Client scripts, custom functions, and custom modules

To handle regional process variations, the team relies heavily on client scripts and custom functions across the **Deals**, **Leads**, **Customers**, and **Item Price Books** modules (on create, edit, and clone pages).

Here are some example uses of subforms:

- In **India**, every product is tied to a specific plant. When a product is selected in a subform, the linked plant is automatically mapped to ensure orders are dispatched from the correct location.
- In **Malaysia**, product selection requires two to three levels of filtering, such as group, plant, and category. They use client scripts to enforce these cascading filters.

Client scripts also power **region-based layouts** and trigger workflows. For instance, when a region is updated based on a design, the appropriate workflows and validation rules are automatically triggered, tailoring the CRM experience to local requirements.

Custom modules and price book needs

- **Multi-currency price books:** Because TPAC needed a price book that could manage multiple currencies and apply discount logic and volume tiers, the company created a dedicated module to help manage this complexity.
- **Order taking:** For repeat orders (existing customers/products), the team wanted a faster path that bypassed the whole sales pipeline. They designed a lightweight order module that enables sales agents to capture just the essential information: product, quantity, packing code, colour, ship quantity, and additional notes. Price books, including volume- and product-based discounts, still apply. Once submitted, the order moves directly to the approval stage, saving time while ensuring accuracy.

Together, these client scripts, functions, and custom modules have given TPAC a system that's flexible enough to mirror each region's needs, yet structured enough to keep data consistent and processes auditable.

They also use a **customer portal** to accommodate multiple layouts and currencies.

Roles and profiles

The process of setting up roles and profiles was complex, due to the organization's unique hierarchy and data-sharing requirements. Access isn't strictly based on designation; rather, it's defined by business processes. For instance, a senior employee might need visibility into data from someone technically above or below them. The company's profiles and data-sharing rules were carefully configured to ensure the right people had the proper access.

Pipelines

The organization has multiple pipelines across different regions, each tailored to specific product types, including existing products, NPD, and consumer products. Every pipeline includes several stages, starting from need analysis and design costing, through production, and ending with delivery and order completion. This structure ensures clear visibility and management of each stage in the process.

Zoho Projects

The TPAC team also wanted to centralize the NPD process across regions. Since each region follows different practices, several gaps made the process complex. To address this, TPAC's partner conducted dedicated workshops with stakeholders from each region and brought everyone together on calls multiple times to iterate and streamline the process. This collaborative approach helped close the gaps and establish a unified workflow.

Today, the team uses multiple project templates for NPD, such as NPD - New, NPD - Old, Design Change, and Colour Change. Each template is structured with five phases, six to seven milestones, and detailed tasks with defined duration. The system integrates with Zoho CRM, so whenever a new product development is initiated, a comprehensive functional requirements document (FRD) is created in Zoho CRM. This automatically links to a project in [Zoho Projects](#), and as work progresses, status updates in Zoho Projects are synced back into Zoho CRM. This integration ensures visibility and consistency across teams and regions.

Zoho Desk

In the manufacturing industry, documenting and analyzing issues through **Corrective and Preventive Action (CAPA) reports** is critical. To streamline this process, the TPAC teams have customized [Zoho Desk](#) to generate a CAPA report when a ticket is closed automatically. They even created a **CAPA report template** to ensure that every report is generated in the exact format they require.

Instead of maintaining resolutions directly in tickets, they capture information in CAPA reports that include detailed fields, images, and root cause analyses. They've also set up region-specific approvals and workflows to ensure proper validation before finalization.

To enable this, they've used **custom functions** and **client scripts** in Zoho Desk to pull live ticket data into CAPA reports. This automation not only saves time but also enforces consistency and compliance across their operations.

Zoho Analytics

The team relies heavily on [Zoho Analytics](#) to track and visualise performance through a wide range of dashboards. Each region has its own dedicated dashboard with filters that let the team narrow results by timeline, salesperson, or product type.

The insights generated include key metrics such as lead conversion rates, total leads, deals won or lost, and comparisons between domestic and export orders. Salesperson performance data flows directly from Zoho CRM, while project-related metrics—like targets versus tasks closed and milestone targets versus actual completions each month—are drawn from Zoho Projects. This integrated view helps the team monitor progress and stay aligned on both sales and project goals.

TPAC leveraged tight **integration across Zoho CRM** modules to consolidate all business data. Their in-house team used their technical expertise to design and execute complex queries that connected raw data from multiple modules, enabling the creation of powerful analytical dashboards. These dashboards now provide real-time insights into forecasted sales across regions and SBUs, as well as complete visibility into ongoing projects and their current milestones.

What truly stood out was the flexibility and ease of use of Zoho Analytics. Despite the complexity of their requirements, the tool empowered TPAC's team to independently create and manage these dashboards in-house, without needing any external support.

TPAC also uses [Zoho SalesIQ](#) and [Zoho Campaigns](#) together to engage website visitors in real time and run targeted email campaigns, helping the team strengthen lead nurturing and customer communication.

Benefits

and ROI



Zoho CRM's impact on TPAC's business operations has been very positive:

- Complete visibility into sales pipelines across all regions ensures smoother opportunity tracking.
- Automated follow-ups and centralized communication give reps a complete view of interactions and prevent leads from slipping through the cracks.
- Real-time reporting and analytics enable faster, data-driven decisions and improved sales efficiency.
- With a faster lead response time, the team can now handle more opportunities without adding extra workforce.

- With reduced manual effort and streamlined processes, the team now faces fewer operational hassles and has become more audit-compliant.

Collectively, these improvements have driven revenue growth and enhanced customer satisfaction—and reinforce the value of a unified CRM system.

Integrations with other apps

Zoho CRM - Card Scanner app integration

The team actively uses the **Card Scanner app**, especially during exhibitions and events where sales reps receive numerous business cards. The app seamlessly integrates with Zoho CRM and automatically captures and organizes contact details, saving time and ensuring no potential leads are missed.



“At exhibitions, we receive hundreds of visiting cards. The Card Scanner app feeds them directly into Zoho CRM, so we never miss a lead.”

Dhiraj Madan,

VP Global Digital Strategy, IT Head

SharePoint integration with CRM

TPAC uses SharePoint to manage and store region-specific documents directly from Zoho CRM. When a region is selected in the CRM layout, the user can define the document type that needs to be uploaded—since the required file types vary by region. Once the file is uploaded to SharePoint, a unique SharePoint URL is automatically generated and stored within the corresponding CRM record, ensuring easy access and better document traceability.

ERP integrations with CRM

Each region runs on a different ERP system. India uses **Tally**, Malaysia uses **SYSPRO**, and Thailand and the UAE use **SBMS**. To bridge these systems with Zoho CRM, they built region-specific integrations using **Zoho Flow**. For example, in India, a custom Push to Tally button inside the CRM enables users to create sales orders and send them directly to Tally. Similar integrations connect Zoho CRM with SYSPRO and SBMS to ensure that once a purchase order is captured in CRM, the corresponding sales order flows automatically into the regional ERP. This setup eliminates duplicate data entries, reduces manual errors, and keeps sales and finance teams aligned in real time.



Dhiraj Madan,

VP Global Digital Strategy, IT Head

“The integration with our ERP systems through Zoho Catalyst ensures that all data flows smoothly. We have visibility and control like never before.”

MS Outlook and Teams integrations

TPAC's Zoho CRM environment integrates with Microsoft Outlook and Teams, enabling email communication and collaboration directly within the CRM. This integration ensures that all email interactions and team communications are captured and accessible in one place.

They've also integrated their ERP with **Zoho Catalyst**, **Zoho Flow**, and **Zoho Creator** to automate processes and handle custom requirements. These integrations ensure smoother workflows and better connectivity across applications.

Integration touchpoints

Zoho Catalyst serves as the middleware between TPAC's ERP and Zoho CRM. It defines and triggers endpoints to push relevant data from the ERP into Zoho CRM, ensuring seamless integration and automated workflows.

Their **Zoho CRM and ERP integration covers** new customer creation, finished goods item creation, and sales order management. Other integration touchpoints include the following:

- **SharePoint repository:** All documents are stored on TPAC's own SharePoint.
- **Zoho CRM and other Zoho apps** are integrated internally, allowing teams across functions to collaborate seamlessly and share information in real time.
- **ERP connectivity:** Zoho communicates with **SYSPRO (Malaysia)** and **Tally** through a custom middleware setup using **MS SQL** and **Zoho Catalyst**. This on-premises integration enables Zoho to push and pull data across multiple heterogeneous ERP systems, creating a true end-to-end connected ecosystem.
- Every year, they conduct an NPS survey through **Zoho Survey** to track customer satisfaction and benefits.

Partner engagement

Empowering TPAC's global success: A strategic Zoho CRM implementation by Yashuss Unlimited

TPAC partnered with **Yashuss Unlimited**, a trusted Zoho implementation partner, to bring structure, efficiency, and scalability to their CRM processes across four regions. With Yashuss's guidance and expertise, TPAC successfully streamlined its operations and built a unified CRM system that could adapt to each region's unique requirements.

Building a custom solution

Rather than taking a one-size-fits-all approach, Yashuss Unlimited worked closely with TPAC to design a solution tailored to their business. The team conducted on-site workshops across the UAE, Malaysia, India, and Thailand, meeting directly with the sales, finance, purchasing, quality, and dispatch teams to understand each region's workflows and challenges.

Using these insights, Yashuss created detailed wireframes that were reviewed and refined through multiple virtual sessions with regional teams. This collaborative process ensured the system design reflected TPAC's real-world operations and gained the support of all key stakeholders early on.

Region-wise rollout and refinement

The implementation began in the UAE, where Yashuss provided hands-on support during the User Acceptance Testing (UAT) and training phases. Any gaps identified were quickly addressed, and the rollout was completed within a month. Lessons from this phase were then used to fine-tune the approach, resulting in smoother, faster implementations in Malaysia, India, and Thailand. The result was a unified CRM setup that improved team collaboration and overall efficiency.

Integrating innovation through Zoho's ecosystem

Yashuss Unlimited went beyond standard CRM deployment. They helped TPAC design a **New Product Development (NPD)** framework that linked Zoho CRM with Zoho Projects, allowing teams to manage product design and development within a single ecosystem. They also built an **Enterprise Service Bus (ESB)** using Zoho Catalyst to integrate regional ERPs with Zoho CRM, ensuring real-time order management and visibility across regions.

Enabling adoption and long-term success

Even after go-live, Yashuss continued to support TPAC through UAT, hypercare, and post-implementation phases. Their proactive involvement helped TPAC teams quickly adapt to the new system and continue optimising their processes over time. With Yashuss's expertise, TPAC achieved greater efficiency, visibility, and alignment across all business units.

A partnership built on trust and results

The collaboration between TPAC and Yashuss Unlimited stands out as a great example of what's possible when technology and teamwork come together. Through careful planning, close cooperation, and a deep understanding of Zoho's capabilities, Yashuss helped TPAC build a scalable, data-driven CRM foundation ready for the future.

Feature request

Based on TPAC's feature request, custom domain mapping was enabled across Zoho CRM Plus applications, allowing TPAC to access customer-facing tools under their own branded domain and ensure a consistent, professional brand experience.

Looking forward

TPAC is eager to tap into Zoho's AI capabilities to make smarter, data-driven decisions across teams. With a stronger data foundation now in place, they plan to use Zoho Analytics more extensively to build dynamic dashboards and deliver self-service insights.

While TPAC has implemented the Zoho CRM Plus suite across the group, they understand that digital adoption is a gradual process — one that follows a hockey-stick curve. It takes time for users to fully embrace new ways of working. At TPAC, this journey is seen as both gradual and transformative, and the team is confident that adoption will continue to accelerate in the coming months and quarters as users experience the platform's actual value. Over the next year, TPAC also plans to gradually migrate its regional ERP systems to SAP, integrate them with Zoho CRM, and bring all processes into a single, connected, intelligent ecosystem powered by Zoho.

“Zoho CRM has become the backbone of our operations. From customer tracking to workflow automation, it keeps all teams aligned and efficient.”

Dhiraj Madan,

VP Global Digital Strategy, IT Head

