

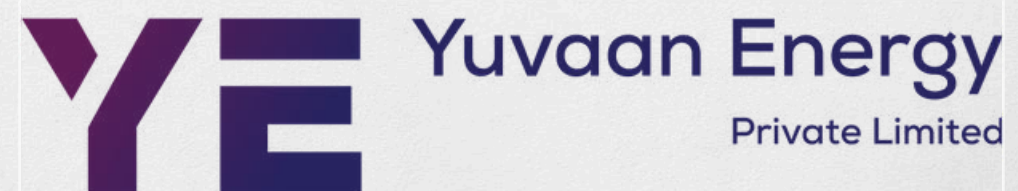
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CASE STUDY

# YUVAAN ENERGY

Ahmedabad, Gujarat, India

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# OUTLINE OF TOPICS

## WHAT WE'LL DISCUSS

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About Company  
Project Overview  
Pain Points  
Solution  
Facts & Figures  
Result  
Project Timeline  
Solution Look Over  
Contact Us



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**THINK ABOUT IT:**

**The CRM and HRMS solution transformed our operations. Lead tracking is now seamless, and HR management has never been more efficient. Highly recommended!**

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# ABOUT YUVAAN ENERGY

Yuvaan Energy is a leading provider of solar plant installation services for both residential and commercial customers. With a commitment to sustainable energy solutions, the company aims to make solar power accessible and affordable for a broad customer base. Their expertise includes core electrical installations such as Line Erection, Transformer Erection & System Integration, Industrial / Commercial (Both Ground Mounted & Rooftop) Solar Power Plant EPC. with experience of over 6,000 K.W., the stand out as being the top solar modules providing companies. However, as the business expanded, managing customer relationships, sales, and HR processes became increasingly challenging.

## PROJECT

# OVERVIEW

Yuvaan Energy needed a centralized CRM and HRMS system to streamline customer inquiries, sales tracking, and HR operations. Manual processes resulted in inefficiencies, delayed follow-ups, and difficulties in payroll and performance management. To enhance productivity, a tailored software solution was implemented to automate operations and improve customer engagement.

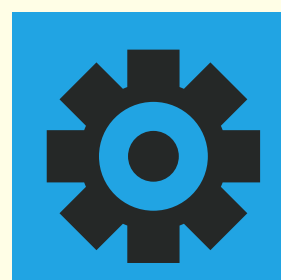
# PAIN POINTS FOR YUVAAN ENERGY



Manual customer management – Difficulty in tracking leads and following up efficiently.



Disorganized sales tracking – No structured process for monitoring deals and project statuses.



Inefficient HR operations – Payroll, attendance, and performance tracking were time-consuming.



Lack of analytics – No proper insights into customer preferences or business performance.

# OUR SOLUTIONS

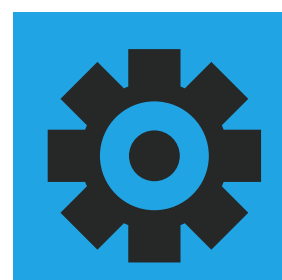
## FOR YUVAAN ENERGY



CRM System Implementation – Automated lead tracking, follow-ups, and a centralized customer database.



HRMS Integration – Payroll automation, attendance monitoring, and employee performance evaluation.



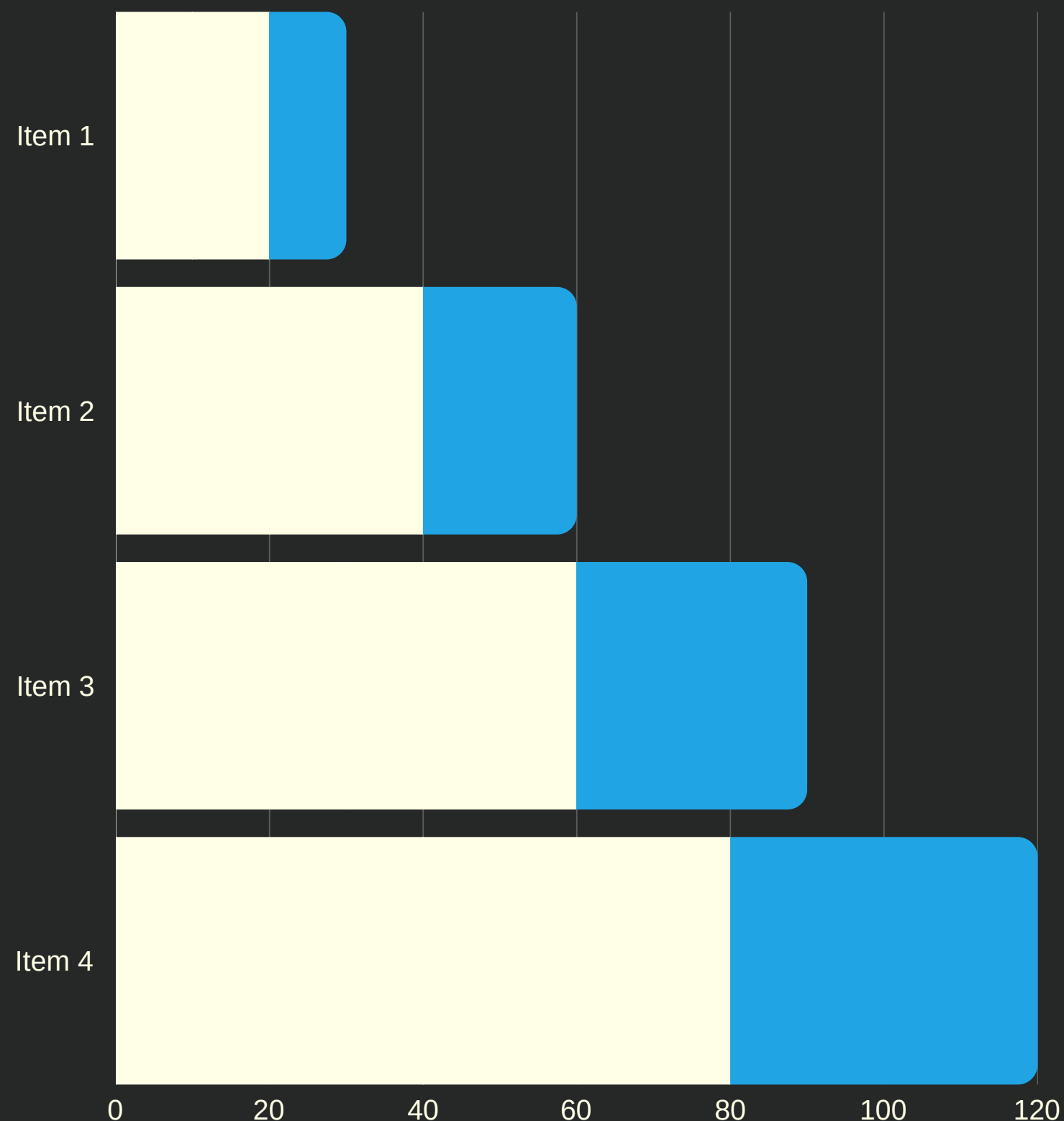
Sales Pipeline Management – Structured tracking of sales stages and project execution.



Data Analytics & Reporting – Insights into customer behavior, sales performance, and workforce efficiency.

# FACTS & FIGURES

- **25%** increase in lead conversion rates due to automated follow-ups.
- **30%** reduction in administrative workload with payroll and HR automation.
- **40%** improvement in customer response time via structured CRM processes.





**INCREASED SALES  
EFFICIENCY AND  
LEAD TRACKING.**

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**STREAMLINED HR  
AND PAYROLL  
OPERATIONS.**

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# YUVAAN ENERGY TIMELINE

## A 6-MONTH JOURNEY



# Solution Look Over

The screenshot displays the PiERP HRMS dashboard for user Juhi Thakker. The interface includes a top navigation bar with the PiERP logo, location (AHMEDABAD), date range (01/01/2025 - 31/12/2025), time (12:16 PM), and user profile (Juhi Thakker). A left sidebar contains navigation options like My Desk, HRMS, and Setting. The main content area features a user profile for Juhi Thakker (HR Manager) with details such as Employee ID (EMP00019), Role (HR Manager), Email Id (careers@yuvaanenergy.com), Phone No. (7863860500), and Company (Yuvaan Energy Private limited). It also shows a 'No Data Available' message, a 'Pin Pages' section with links to Leave Approval, Reimbursement, My Interviews, Performance Review, and My Attendance, and a 'Performance Meter' showing 6.59 Hrs of average working hours. At the bottom, there are sections for Upcoming Events (Ashvinkumar Solanki, Warehouse Assistant, Feb 15), Time At Work (Yet To Check-in), Circular, and Holiday List.

# Solution Look Over

AHMEDABAD
01/01/2025 - 31/12/2025
12:18 PM
Juhi Thakker

**HRMS**

- Employee
- Work Force
- Probation
- Head of Department
- Recruitment
- HR
- Performance Management
- Attendance
- Payroll
- Report
- Settings

Work Force

Search...

+ ADD

SR#	EMPLOYEE NAME	EMPLOYEE ID	DEPARTMENT	REPORT TO	JOINING DATE	PROBATION END DATE	CONTACT DETAILS	STATUS	ACTION
1	Chintan Dabhi Executive	EMP-36	EPC		01 Apr 2025		8128300504 chintand539@gmail.com	<input checked="" type="checkbox"/>	
2	Hemant Pandya Sales Manager	EMP-23	EPC		01 Apr 2024		9979883777 hemantpandya1956@gmail.com	<input checked="" type="checkbox"/>	
3	Jay Bhatt Director	EMP-02	Management		01 Apr 2024		9825045890 nirali.talaviya@cittasloutions.in	<input checked="" type="checkbox"/>	
4	Jagat Bhatt Director	EMP-01	Management		26 Apr 2024	01 May 2024	9879500822 jagat@yuvaanenergy.com	<input checked="" type="checkbox"/>	
5	Vishva Manvar Graphic Designer	EMP00035	Management		01 Feb 2025	01 Apr 2025	6355267607 vishvamanvar285@gmail.com	<input checked="" type="checkbox"/>	
6	Ashit Gandhi Sales Executive	EMP00034	EPC		24 Jan 2025	24 Mar 2025	8980024691 ashitradhi6111991@gmail.com	<input checked="" type="checkbox"/>	
7	Amit Citta Back Office Executive	EMP00033	B To B		31 Jan 2025	28 Feb 2025		<input checked="" type="checkbox"/>	
8	Akshata Bagada Back Office Executive	EMP00031	EPC		16 Jan 2025	17 Mar 2025	9510481595 akshitabagada14@gmail.com	<input checked="" type="checkbox"/>	

# Solution Look Over

AHMEDABAD  
01/01/2025 - 31/12/2025

12:22 PM
Juhi Thakker

Attendance Summary

Search...

HRMS • Attendance • Attendance • Attendance Summary

Attendance Sheet
Detail View

Select Month  
February

Select Year  
2025

Present Absent Holiday Leave

EMPLOYEE	SAT 01	SUN 02	MON 03	TUE 04	WED 05	THU 06	FRI 07	SAT 08	SUN 09	MON 10	TUE 11	WED 12	THU 13	FRI 14	SAT 15	SUN 16	MON 17	TUE 18	WED 19	THU 20	FRI 21	SAT 22	SUN 23	MON 24	TUE 25	WED 26
Vishva Manvar <small>Graphic Designer</small>	Absent	Holiday	Absent	Absent	Present	Present	Present	Present	Holiday	Present																
Ashit Gandhi <small>Sales Executive</small>	Absent	Holiday	Absent	Absent	Present	Present	Present	Present	Holiday	Present																
Amit Citta <small>Back Office Executive</small>	Absent	Holiday	Absent	Absent	Absent	Holiday	Holiday	Absent	Holiday	Absent																
Akshata Bagada <small>Back Office Executive</small>	Present	Holiday	Holiday	Present	Present	Present	Present	Present	Holiday	Present								Holiday	Holiday	Holiday						
Simran Rajput <small>Back Office Executive</small>	Present	Holiday	Holiday	Present	Present	Absent	Present	Absent	Holiday	Absent																
Milan Rathod <small>Sales Executive</small>	Present	Holiday	Absent	Absent	Absent	Present	Present	Present	Holiday	Present	Holiday	Holiday	Holiday	Holiday												
Brijesh Gajjar <small>Sales Executive</small>	Present	Holiday	Present	Absent	Present	Present	Holiday	Present	Holiday	Present																
Priyanka Thosar <small>Senior Accountant</small>	Present	Holiday	Present	Present	Present	Present	Present	Present	Holiday	Present																
Rizwana Bariwala <small>Back Office Executive</small>	Present	Holiday	Present	Present	Present	Present	Present	Present	Holiday	Present																
Asha Barot <small>Back Office Executive</small>	Present	Holiday	Present	Present	Present	Present	Present	Present	Holiday	Present						Holiday										

- My Desk
- HRMS
- Setting

- HRMS
- Employee
- Recruitment
- HR
- Performance Management
- Attendance
  - Leave Management
  - Attendance
- Payroll
- Report
- Settings

# Solution Look Over

The screenshot displays the PiERP HRMS interface. The top navigation bar includes the PiERP logo, the location 'AHMEDABAD', the date range '01/01/2025 - 31/12/2025', the time '12:19 PM', and the user profile 'Juhi Thakker'. The left sidebar contains navigation options: My Desk, HRMS, and Setting. The HRMS menu is expanded, showing options like Employee, Recruitment, HR, Performance Management, Attendance, Payroll, Report, and Settings. The main content area is titled 'Vaccancies' and shows a table of job openings. The table has columns for SR#, Job Title, Work Place Type, Job Location, Work Experience, Offered Salary, Referral Amount, Status, and Action. There are three entries listed, all with a status of 'Active'. A search bar and an 'ADD' button are located at the top right of the table area. At the bottom right of the table, there are navigation controls for 'Previous', '1', and 'Next', along with the text 'Showing 1 to 3 of 3 entries'.

SR#	JOB TITLE	WORK PLACE TYPE	JOB LOCATION	WORK EXPERIENCE	OFFERED SALARY	REFERRAL AMOUNT	STATUS	ACTION
1	F Field Sales Executive Permanent	2	Ahmedabad	2-4 Years	20-40 K	₹0.00	Active	
2	C Core Developer Full Time WFH	1	Gandhinagar	5-10 Years	20-40 K	₹0.00	Active	
3	S Senior Accountant Full time	2	Ahmedabad	5-10 Years	20-40 K	₹0.00	Active	

Showing 1 to 3 of 3 entries

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# Solution Look Over

PiERP
AHMEDABAD  
01/01/2025 - 31/12/2025
12:20 PM
Juhi Thakker

My Desk

HRMS

Setting

**Reimbursement**

HRMS • HR • Reimbursement

**376972.00**

Approval Amount

**0.00**

Rejected Amount

**57051.25**

Pending Amount

**434023.25**

Total Amount

#	EMPLOYEE NAME	DEPARTMENT	EXPENSE TYPE	EXPENSE DATE	AMOUNT	ATTACHED BILL	STATUS	ACTION
1	Kampan Desai Sales Executive	EPC	Travel	05 Feb 2025	₹ 1462.00	No	Pending	
2	Ravirajsinh Parmar Sr. Sales Executive	EPC	Travel	08 Feb 2025	₹ 3292.00	No	Pending	
3	Ravirajsinh Parmar Sr. Sales Executive	EPC	Travel	08 Feb 2025	₹ 2645.00	No	Pending	
4	Kampan Desai Sales Executive	EPC	Travel	05 Jan 2025	₹ 1976.00	No	Pending	
5	Meet Parekh Sales Manager	EPC	Others	07 Feb 2025	₹ 28605.00	Yes	Pending	
6	Dev Desai Executive	EPC	Travel	01 Jan 2025	₹ 3968.00	No	Pending	
7	Brijesh Gajjar Sales Executive	EPC	Travel	03 Feb 2025	₹ 2392.00	Yes	Pending	

HRMS

- Employee
- Recruitment
- HR
  - Dashboard
  - Learning Management
  - Discipline
  - Reimbursement
  - Reimbursement
  - Feedbacks
  - Exit Management
- Performance Management
- Attendance
- Payroll
- Report

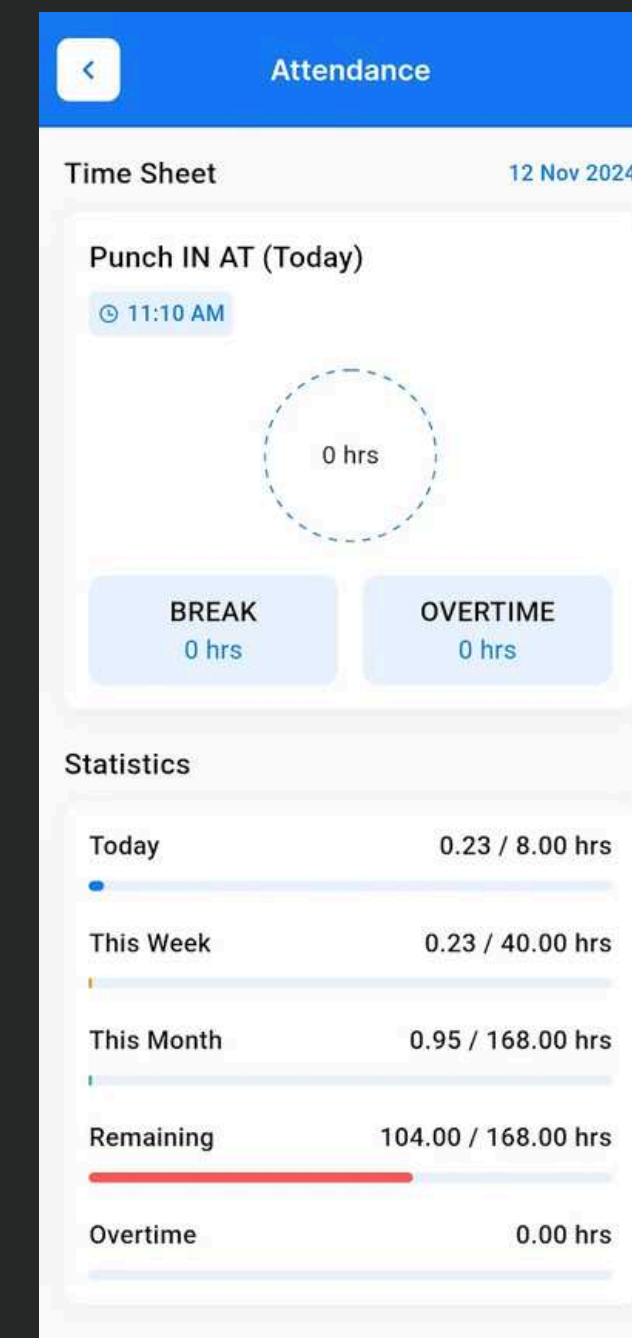
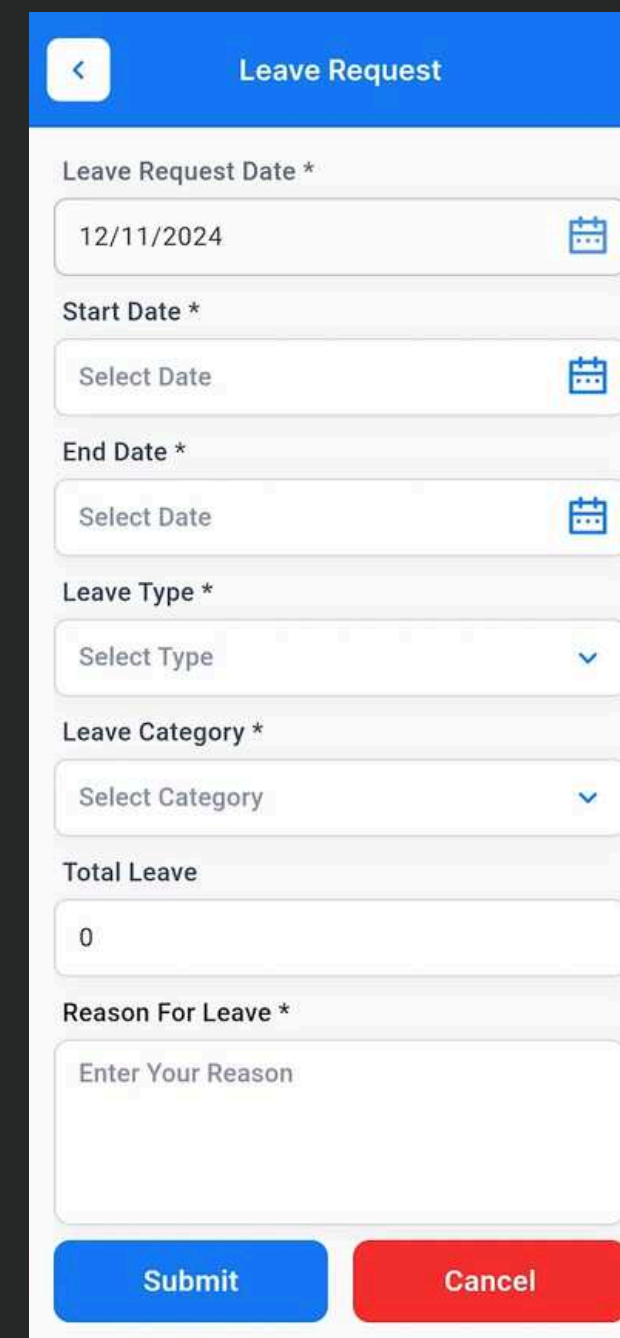
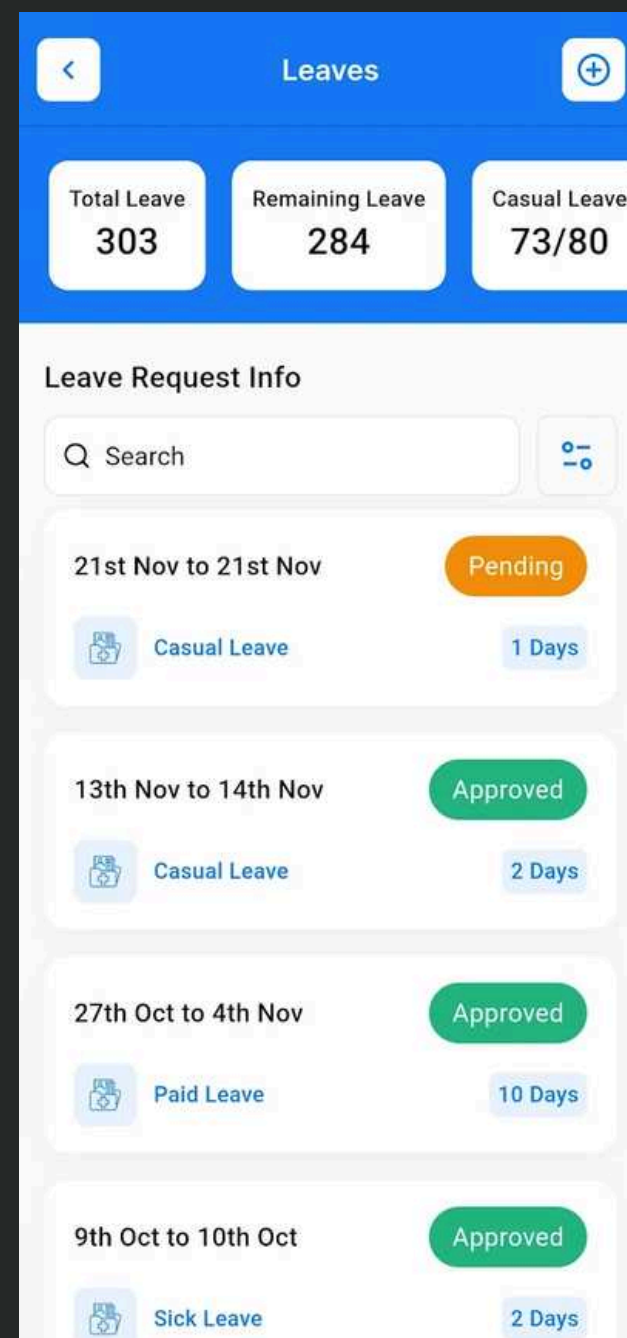
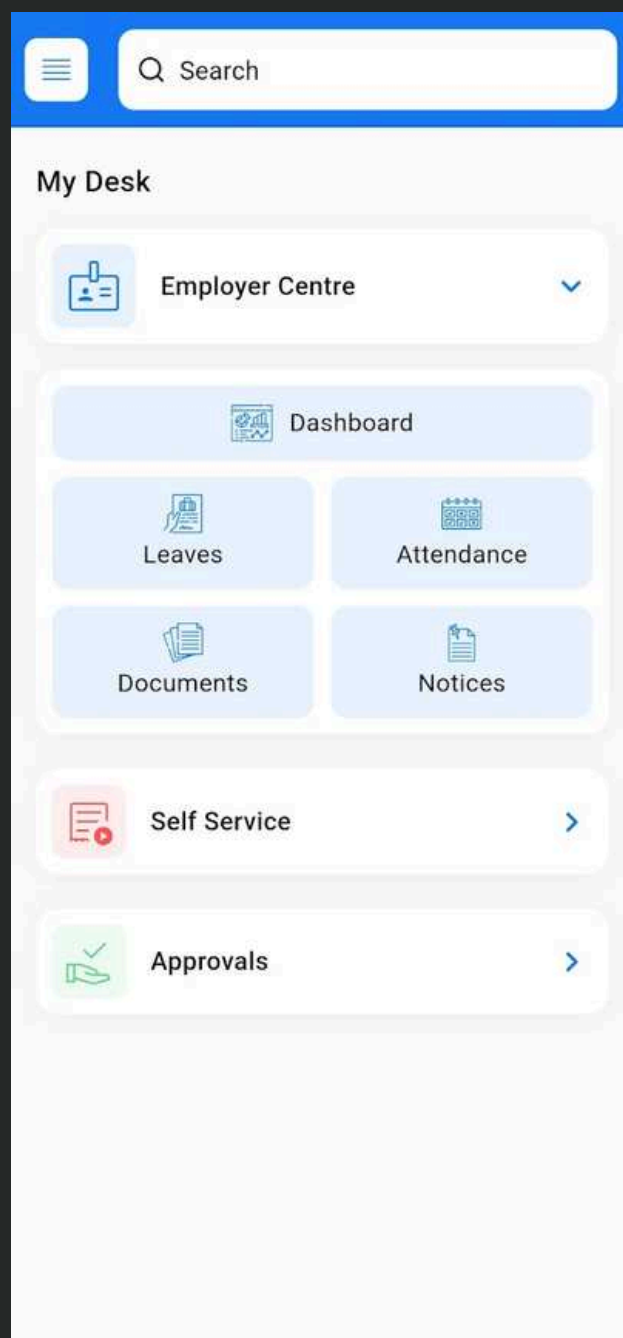
# Solution Look Over

The screenshot displays the PiERP HRMS interface for the 'Run Payroll' section. The header shows the location as 'AHMEDABAD' and the period '01/01/2025 - 31/12/2025'. The user is identified as 'Juhi Thakker'. The main content area is titled 'Pay Run of December, 2024' and includes two tabs: 'Employee Summary Details' (active) and 'Statutory & Deduction Details'. A table lists employee details for the pay run, including names, dates, and various financial components.

ID	PAY DAYS	BASIC PAY	GROSS PAY	BONUS	H.R.A	INCENTIVES	INCOME	OTHER ALLOWANCE	EPF	ESI	PT	LWF	T.D.S	TDS	TOTAL GROSS PAY	TOTAL DEDUCTION
Milan Rathod:25/12/2024	7.00	0.00	0.00	0.00	0.00	0.00	4516.13	0.00	0.00	0.00	0.00	0.00	0.00	200.00	4516.13	
Brijesh Gajjar:23/12/2024	9.00	5545.16	0.00	1109.03	2218.06	0.00	0.00	2218.07	1532.00	0.00	0.00	6.00	0.00	0.00	11090.32	
Priyanka Thosar:09/12/2024	23.00	11129.03	0.00	2225.81	4451.61	0.00	0.00	4451.61	0.00	0.00	200.00	6.00	0.00	0.00	22258.06	
Rizwana Bariwala:25/11/2024	31.00	14000.00	0.00	2800.00	5600.00	0.00	0.00	5600.00	1800.00	0.00	200.00	6.00	0.00	0.00	28000.00	
Killol Thakker:18/11/2024	29.00	13190.32	0.00	2638.06	5276.13	0.00	0.00	5276.14	1800.00	0.00	200.00	6.00	0.00	0.00	26380.65	



# Mobile App Look Over



# CONTACT US

FOR QUESTIONS, COMMENTS,  
AND MORE INFO

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## ADDRESS

#911, Times Square  
Arcade, Opp. Rambaug, Nr.  
Ravija Plaza, Thaltej-Shilaj  
Road, Thaltej. Ahmedabad-  
380059.

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## PHONE

+91 79 4107 6111  
+91 79 4899 1546  
+91 81 4029 7820

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## EMAIL

[business@cittasolutions.com](mailto:business@cittasolutions.com)

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## WEBSITE

[www.cittasolutions.com](http://www.cittasolutions.com)