

PAVING WAY TO GREATER SUCCESS FOR OUR CLIENTS



Consultant Case Study

Owning a consultant business comes with a lot of challenges, already. Managing to invoice and adapting 10 other software to manage each activity, does nothing but simply adds to the task.

As a consultant, you need a dedicated consultant billing software that can automate and track your due payments, even when you're away. For a consultant, precise time tracking is crucial for your business because non-compliance can lead to incorrect invoices and distrust. Moreover, a consultant needs to actively manage each of its business aspect just like any other businessman like client management, task management, time tracking, inventory management, time to invoice conversion, and more.

To make business management easy and fit all the 10 different sectors of software in one account, we created a completely customized self-hosted solution for our client in the consultancy business.

Challenges

Our client is in the force management and consultancy sector of business, helping further businesses with the workforce.

In order to efficiently manage the business, clients, workforce, and invoicing, here we were provided with key requirements:

- ✓ Invoicing clients based on a number of workforces provided.
- ✓ Time Tracking to easily calculate overtime.
- ✓ Create a dropdown for overtime charges in the invoice template.
- ✓ A separate section for creating an employee profile.
- ✓ Invoice template customization as per software customization.
- ✓ Generating the reports for calculating the profits and losses.

Solutions

Keeping in mind all the requirements shared with us, our team quickly created a plan to customize an entire software for our client. Here is how we worked on the project:

Scope of Work:

The scope of the project includes the implementation of Invoicera in online mode with existing features of the application incorporated with customized Invoice Template and functionality involved. And

The application will primarily include the following modules:

1. Created Employee Management Module:

A module created to allow admin to manually upload or import employees in CSV or XLS format.

1. Employee Name
2. Employee Number
3. Rate

2. Invoice Management:

A list of some customized additional columns added to the invoice creation page to make invoicing easy.

3. Client Management

A completely dedicated section to allow admin to:

- a. Add new clients
- b. View, Filter list of Client: View all the clients in the client management
- c. Edit Client, go to details, Add Credit

4. Staff Management

This section will help admin to

- a. Add staff members of the company
- b. Define permissions for each Staff

5. Report Management:

A dedicated section to create and analyze reports infrequent intervals:

- a. **Client Report:**
- b. **Employee Management Report:**
- c. **Invoice Report:**
- d. **Staff Report:**
- e. **Estimate Report:**
- f. **And many more**

6. Technical Assistance

Invoicera believes in providing technical assistance and guidance even after delivering the project. Our support staff is easily available through different platforms.

- Skype
- Goto Meeting
- Uberconference
- Email or phone
- Remote support via Teamviewer

Business Name	Business Email	Status	Currency
ABC Corp	NA	Active	USD
XYZ Corp	xyz@xyzcorp.com	Active	USD
ABC Ltd	abc@abc.com	On Hold	USD
DEF Corp	def@defcorp.com	On Hold	USD
GHI Corp	ghi@ghi.com	On Hold	USD

Final Words:

Invoicera is building invoicing platforms for businesses around the globe for the past 16 years. Customization of an invoice software ensures you host a completely self-hosted invoice software in your environment and let it adapt to your system.

Are you also facing invoicing and business management problems with your manual set up? Host a custom invoice software, today.

Get in touch with our experts now!