

# MAKING INVOICING EASY FOR DIGITAL AGENCIES



## Client Requirements

Owning a digital agency is as challenging as finding creative ideas every day. Your work is not limited to just some excel sheets or suffice through regular workflows. The act of balancing creativity with business is not a play for everyone. But, the wise men are doing it like a child's play.

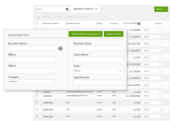
One of the simplest formula to make any job hassle-free is by doing it SMARTLY. Not every task needs hard work, some can be easily carried forward through integrations with AI.

A custom digital agency invoice software is one such major example of taking out the hardship from the work. A simple integration can help you let your employees focus on more creative ideas for the next big project than spending in numerous hours managing workflow and invoice communications.

## Challenges

Falling prey to some similar troubles, one of our clients from the digital world owning a digital agency came to us. Some of the core challenging areas affecting their day to day workings were:

- ✓ How to apply bulk pricing and set automated dynamic pricing for their clients?
- ✓ Use Invoicera to send a final invoice after calculating the final usage.
- ✓ How to manage multiple clients automatically?
- ✓ How to automate recurring bills?
- ✓ A segregated report file for AR & AP
- ✓ How to manage workflow in the organization?



## Solutions

Invoicing and cash flow management are the backbone for business. To strengthen and supplement invoicing, we came up with customized solutions for our digital marketeer. Have a quick look at all the solutions below:

### 1. Client Management:

In order to make client management easy, we set up different sections namely, price management and monthly fees. These sections will help set dynamic prices and fees depending upon each client.

### 2. Invoice Management:

A separate dashboard to view all invoices in a single place. Also, create invoices based on your dynamic prices or automate them. Quick dropdowns to make your selection easy and convenient. The unit price will be calculated automatically depending on the unit usage. The "unit usage" will be received from the API. Here, an admin will also be able to add unit usage manually.

### 3. Staff Management:

Add all staff members and grant them permission to perform relevant tasks and easily keep a tab on them.

### 4. Report Management:

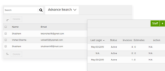
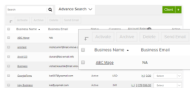
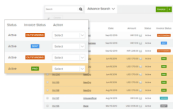
Customized reports specially created to make analysis easy.

- a. Invoice/bill report
- b. Customer report
- c. Staff report
- d. Estimate report

### 5. Technical Assistance:

Invoicera will provide all the required technical assistance pre-installation of the application on the server and post-installation of the application via various modes available:

- a. Skype
- b. GoToMeeting
- c. Uberconference
- d. Email or phone
- e. Remote support via Teamviewer



## Final Words:

Invoicera is one of the leading custom invoicing software in the market with more than 75 customizations for leading global leaders in past 16 years.

The invoicing software offers many unique features customised to specific business needs of small businesses and enterprises. It helps you to automate and simplify your business processes and communication with online invoicing and payments, expense management, recurring/subscription billing, client/vendor panels, time tracking, invoice approval process, multi lingual & multi currency support, staff permissioning, financial reporting & analysis, purchase order management.

## Features:

- ✓ Invoice approval process/ customized approval process
- ✓ Two-factor authentication
- ✓ Multiple business access
- ✓ 30+payment gateways
- ✓ 3 layers account security
- ✓ Staff management
- ✓ A/R&A/P Management
- ✓ Multi-lingual compatible Invoices

## Services:

- ✓ Online Invoice software
- ✓ Subscription billing management
- ✓ Project management
- ✓ Time tracking software
- ✓ Custom workflow management
- ✓ Expense management
- ✓ Customize Invoicing solution
- ✓ Multi- Business Management
- ✓ Third Party Integration

Invoicera is efficient in making any customization request possible. Write down to us for your invoice software customization requests. Our client support will assist you the best.

Hoping to hear from you soon!