



Automatic Statement & Invoice for Print & Sign Company

PROJECT DETAILS

 Cloud Consulting

 Dec. 2020 - Mar. 2021

 \$50,000 to \$199,999

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"I truly felt that I was working with a large company with lots of resources."

PROJECT SUMMARY

A print and sign shop wanted to get an automated system that took care of their quotes, invoices and statements. They partnered with SkyPlanner to develop that system and streamline their operations.

PROJECT FEEDBACK

Thanks to the system that the SkyPlanner team put in place, the company is saving around a hundred man-hours in billing every week. It's also resulted in their customer processing their payments faster. The company has no complaints with the service and are contacting the team to add new features.



The Client


Please describe your company and your position there.


I am the owner of a large print and sign shop in Miami.


The Challenge

For what projects/services did your company hire SkyPlanner?

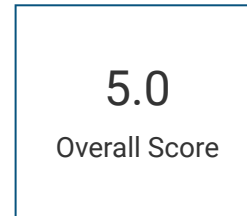
Quotes, invoices and statements were sent manually in our company and it was required a good amount of time to complete these repetitive tasks. The system developed by SkyPlanner automates these processes and sends by email all the documents. Each email includes a pdf attached with the invoice, statement or estimate. This pdf has to be generated dynamically or be extracted from an external API.

 President, Print & Sign Shop

 Manufacturing

 11-50 Employees

CLIENT RATING



Quality: 5.0

Schedule: 5.0

Cost: 4.0

Would Refer: 5.0





The Approach

How did you select this vendor and what were the deciding factors?

I reached out to some colleagues and ask for recommendations on a Salesforce partner. SkyPlanner was one of the three references I got, but honestly the only one that was a company, the rest were just 1 man shop. After my initial interview with them I was convinced, they will be a knowledgeable partner.

Describe the project in detail and walk through the stages of the project.

SkyPlanner had to develop an automation system that could be configured by the user indicating the schedule and, at the account level, it could disable the automation or indicate to which contact send it. In addition, it needed a logic to establish which contacts to send follow-up to. The system had to create a daily notifications summary, specifying eventual errors and next schedule.

How many resources from the vendor's team worked with you, and what were their positions?

The team consisted of two developers, one QA, one Project Manager, and one Business Analyst

The Outcome

Can you share any outcomes from the project that demonstrate progress or success?

Skyplanner's work is saving over 100 staff hours per week when it comes to billing...and customers are paying a lot faster.





How effective was the workflow between your team and theirs?

Amazing. Their team had standing weekly zoom meetings with team and the communication was great.

What did you find most impressive or unique about this company?

That is wasn't just one person involved with know-how. I truly felt that I was working with a large company with lots of resources. .

Are there any areas for improvement or something they could have done differently?

Zero complaints on my end. As a matter of right right now we are contacting them again to add new features!

