



Case Study: Streamlining Matter Management and Billing with Accounting seed

Twopir's specialized Salesforce customization enabled efficient integration of third-party systems and streamlined administration and billing, leading to [seamless financial operations](#) and [enhanced productivity](#).

Tech Stack for Project Success



About the client

Our client has a law firm specializing in divorce and family law in the United States. With a team of dedicated attorneys, they offer expert legal support in matters such as divorce, child custody, and family disputes. Their personalized approach ensures that clients receive compassionate and effective representation, making them a trusted choice for navigating complex family law issues.

For this client, we implemented Accounting Seed for Salesforce to streamline finance management. Automated monthly mass billing creation saved time and reduced errors, while integration with Salesforce, iManage, and HubSpot streamlined collaboration and productivity. Utilizing Flow and custom validation logic, we automated matter, billing process, and task management, alongside tailored solutions improving efficiency, accuracy, and email communication, significantly boosting overall efficiency.

Streamlining Lead Scalability: The HubSpot-Salesforce Integration



🎯 Challenge : Scaling Lead Generation: Ensuring Efficient Integration with Salesforce.

As business grows, it's tough to keep up with personalized customer interactions. With more customers, different data sources, and changing preferences, tracking interactions and nurturing leads gets overwhelming. Traditional CRM systems can't handle this growth well, causing missed leads and messy workflows.

🔧 Solution : Automated Lead Syncing: Enhancing Salesforce Integration for Scalable Growth.

This integration allows for seamless data flow between marketing and sales teams, ensuring that both have access to the most accurate and up-to-date information. For instance, leads generated and nurtured in HubSpot can be automatically synced to Salesforce, where sales can further engage until closure, providing a seamless transition that ensures no leads are lost in the shuffle.

Enhancing Marketing Attribution & Lead Management with Invoca for Salesforce

Challenge : Inadequate Insight into Customer Conversations and Marketing Attribution

Clients struggle with gaining accurate insights into customer conversations and attributing marketing efforts to conversions. This lack of clarity hampers their ability to optimize marketing strategies and effectively track lead conversions.

Solution : Implementing Invoca for Salesforce

Invoca for Salesforce provides marketing attribution and AI-powered insights into customer conversations, converting them into Salesforce leads. Closed-loop reporting tracks these leads from creation to closure, allowing clients to identify which calls are converting and optimize their marketing efforts accordingly.



Streamlined Lead Conversion to Person Account and Prospect



🎯 Challenge : Inefficient Lead Conversion Process

Our client experienced challenges in efficiently converting leads into accounts and prospects. The manual conversion process was prone to errors, causing delays and inconsistencies in data management, which affected pipeline and lead management.

🔧 Solution : Automated Lead Conversion for Improved Efficiency

To address these challenges, we implemented an automated lead conversion process. When a lead is converted, it automatically creates a Person account and a prospect in the system. This automation ensures accurate data transfer, reduces errors, and speeds up the conversion process, enhancing overall efficiency in managing the pipeline and customer relationships.

Automating Matter Management for Improved Efficiency and Accuracy

Challenge : Inefficient and Error-Prone Management of Matters

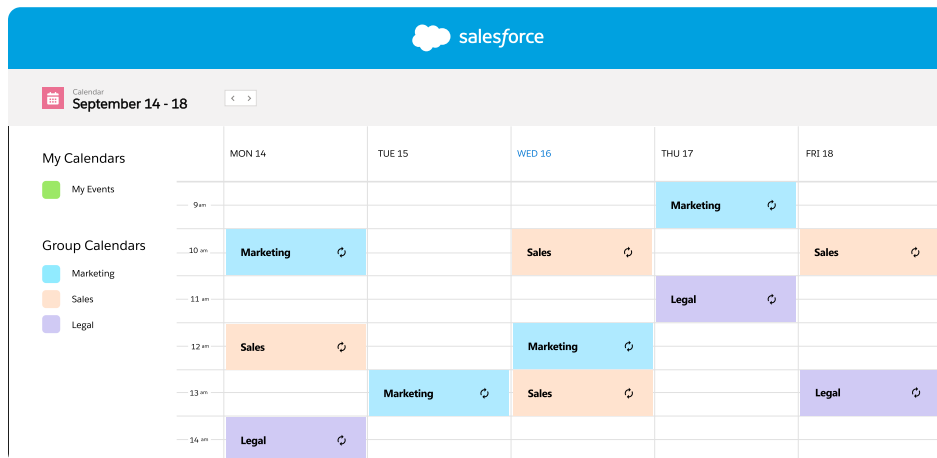
Our client faced significant challenges in managing Matters, especially for Active Matters. Manual processes were time-consuming and prone to inefficiencies, leading to difficulties in maintaining accurate balances. This hindered quick access to critical information necessary for decision-making and compliance.

Solution : Enhancing Matter Management through Automation

To address these challenges, we automated the management of Matter. Salesforce validation rules ensure accurate data entry, reducing errors. Automation streamlined the Billing Process and updated accurate Amount and balances. Automated Flow improved communication and timely task completion, significantly reducing manual workload and enhancing data accuracy and accessibility.



Custom Calendar Solution for Attorney Task and Event Management



	MON 14	TUE 15	WED 16	THU 17	FRI 18
My Calendars					
My Events				Marketing	
Group Calendars					
Marketing	Marketing		Sales		Sales
Sales				Legal	
Legal	Sales		Marketing		
		Marketing	Sales		Legal
	Legal				

🎯 Challenge : Efficient Event and Task Management for Attorneys

Attorneys struggle with managing their schedules effectively, as existing calendar solutions do not cater to their specific needs. This leads to inefficiencies in tracking events and tasks, resulting in missed deadlines and disorganized workflows

🔧 Solution : Built Customized Calendar for Attorneys

To address this challenge, a custom calendar was developed for attorneys, enabling the creation and display of events and tasks specific to each attorney, user. Attorneys can manage their events seamlessly through this calendar, with functionalities to create, edit, update, and delete events. This tailored solution ensures that attorneys can efficiently track their schedules, improving productivity and organization.

Streamlined Document Generation with Conga Composer

🎯 Challenge : Efficient and Customizable Document Generation in Salesforce.

Clients struggle with time-consuming, error-prone manual document creation and need scalable, consistent, and integrated solutions within Salesforce.

🔧 Solution : Automating Document Generation with Conga Composer.

Conga Composer is a powerful document generation and automation tool designed to streamline the creation of custom documents and reports using Salesforce data. By leveraging Conga Composer, users can significantly reduce manual efforts, enhance accuracy, and ensure consistency across all generated documents.



Integration of iManage with Salesforce for Enhanced Document Management



Challenge: Integrating Document Management Systems with Salesforce.

Our Client faces difficulties in managing documents and emails efficiently due to the need to switch between Document Storage and Salesforce platforms. This creates workflow interruptions and inefficiencies in accessing and handling critical information.

Solution: iManage Integration for Streamlined Salesforce Workflow

The new integration, available and supported through iManage, allows users at law firms, corporate legal departments, and public sector organizations to access their iManage workspaces, folders, documents, and emails – right from within their Salesforce platform – eliminating the friction of switching between two different environments. It provides cloud-based enterprise legal management solutions for law firms, legal departments to help create a seamless connection between iManage document and email management and the Salesforce platform. Clients will now be able to map directly from the Salesforce platform to selected iManage workspaces or folders and navigate their content with a simple click. Uploading and saving documents or folders is accomplished via intuitive drag-and-drop or quick dialog options.

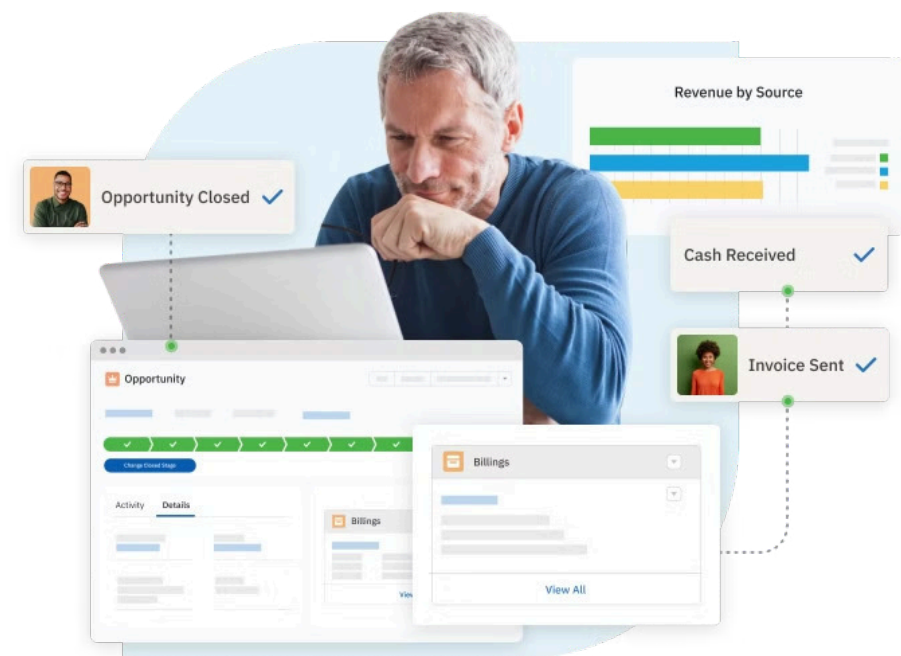
Streamlining Billing Operations with Accounting Seed

🎯 Challenge : Managing Billing Complexity in Growing Organizations.

Clients face significant challenges in managing their billing operations due to the complexity of Matter billing, manual billing processes, multi-entity general ledger management, and efficient cash receipts and collections. Handling various billing rates, consolidating multiple billing lines, processing payments in different currencies, and prone to errors without streamlined systems. Additionally, the lack of automation hampers operational efficiency and weakens internal controls, making it difficult for stakeholders to interpret financial data and make informed decisions.

🔧 Solution : Implementing Accounting Seed for Enhanced Financial Operations

To address financial management complexities, we implemented Accounting Seed, which streamlines project billing, creation of billing records, recurring billing, and automated consolidated multiple billing lines. It provides robust general ledger management with multi-company and multi-currency support, ensuring accurate financial reporting across different entities and currencies. Additionally, integrated cash receipts and automated workflows with Stripe payment processing enhance operational efficiency, reduce manual errors, and ensure timely financial transactions and reporting.



Streamlining Billing Invoice Distribution with Accounting seed



Challenge : Streamlining Billing Invoice Distribution: Overcoming Complexities with Accounting Seed.

Efficiently managing and distributing billing documents poses several challenges for clients. Generating flexible billing PDF formats tailored to diverse customer needs, ensuring timely and accurate mass email distribution of billing PDFs with customized communication templates are complex tasks. Additionally, attaching supplementary documents and automating the entire customer billing email process requires significant effort and coordination.

Solution : Efficient Billing Process Enhancement: Leveraging Accounting Seed Features.

To address these challenges, with the help of Accounting seed we created a comprehensive suite of features designed to streamline and enhance the billing process. We provide flexible billing PDF formats that can be customized to meet specific customer requirements. Our system enables mass emailing of billing PDFs with personalized communication templates.

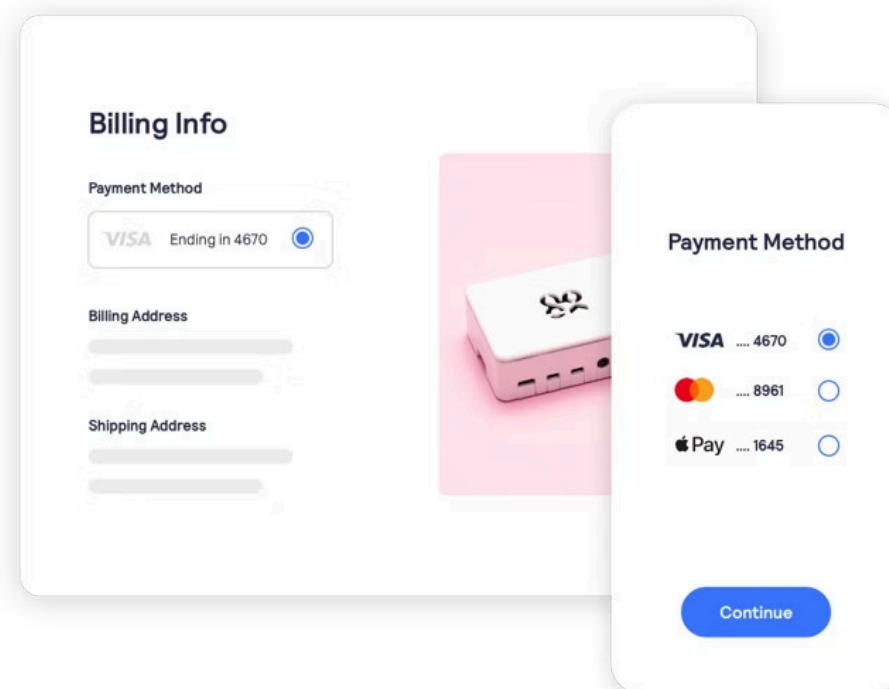
Customer Portal for Streamlined Payments with Authorize.Net Integration

🎯 Challenge : Efficiently Processing Payments and Managing Billing Data

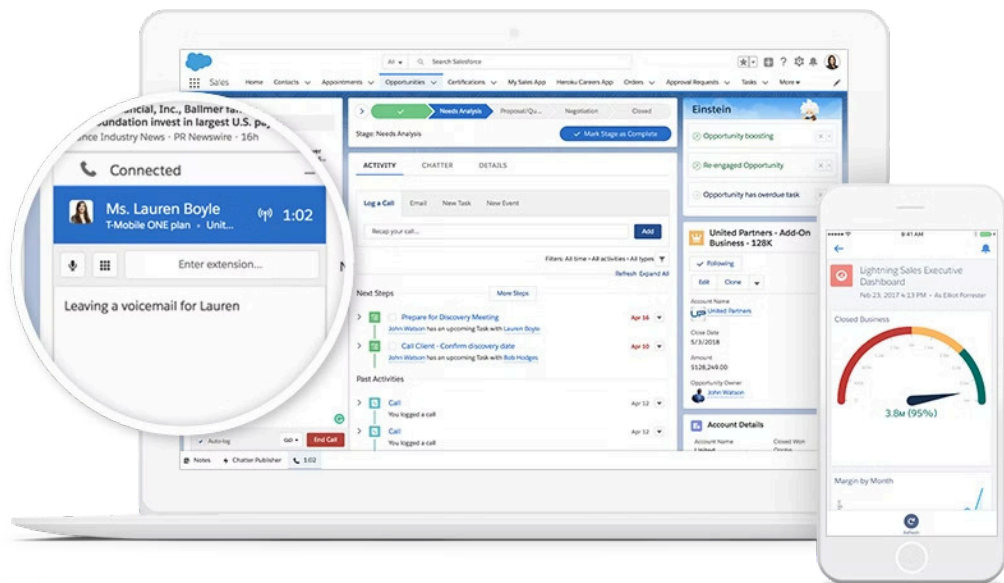
Clients face challenges in processing payments through various methods and ensuring that payment data is accurately reflected in their Salesforce system. This can lead to delays in cash receipt generation and complications in applying payments to the correct billing records.

🔧 Solution : Integrated Customer Portal for Credit Card and E-Check Payments

To address this challenge, a customer portal was created for processing payments via credit card and e-check. This portal directly replicates payment information in Salesforce, creating cash receipts that are automatically applied to the related billing records. Seamless integration streamlines the payment process, reduces errors, and ensures timely and accurate billing management. By integrating with Authorize.Net, the portal offers efficient and secure payment processing, automated invoicing, recurring payments, reduced manual data entry errors, and real-time insights into customer behavior.



Enhancing User Experience for Billing Processes with Custom Lightning User Interface



Challenge : Enhancing User Interface for a Complex Billing System: Addressing Client Challenges

The primary challenge was to develop a user interface tailored to meet the diverse and complex billing process requirements of our client. The existing system was not intuitive and required extensive training for users to navigate through the billing options effectively. Additionally, it lacked the flexibility to adapt to various billing scenarios, leading to inefficiencies and user frustration.

Solution : Custom Lightning User Interface for Optimal Billing Experience

To address these issues, we designed and implemented a custom Lightning User Interface (UI) that significantly improved the user experience. The new UI was built with the following key features:

- **User-Centric Design:** Focused on simplicity and ease of use, ensuring that users could navigate through billing processes without extensive training.
- **Modular Structure:** The interface was developed using a modular approach, allowing easy updates and customization for different billing scenarios.
- **Enhanced Visuals:** Integrated modern design elements and interactive visuals to make the billing process more engaging and less tedious.
- **Real-Time Feedback:** Provided real-time feedback and validation to help users correct errors on the go, thereby increasing accuracy and efficiency.

Optimizing Salesforce Reporting and Dashboard Management

🎯 Challenge : Inadequate Reporting and Dashboard Capabilities

Clients often struggle with effective reporting and dashboard functionalities. The reports and dashboards may not provide the depth of insights required, are not user-friendly, and lack customization options. This leads to inefficient decision-making processes and an inability to track key performance indicators (KPIs) effectively.

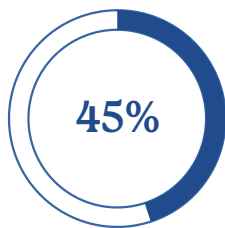
🔧 Solution : Enhanced Salesforce Reporting and Dashboard Solutions

We implemented advanced Salesforce reporting and dashboard solutions with features such as:

- **Advanced Customization:** Tailored reports and dashboards for specific business needs.
- **User-Friendly Interface:** Intuitive, easy-to-navigate dashboards.
- **Real-Time Data:** Up-to-date information for accurate decision-making.
- **Dynamic Filtering** : In-depth data analysis capabilities.
- **Visual Enhancements:** Provided charts, pie charts, and graphs to illustrate complex data relationships and comparisons using various graph types.

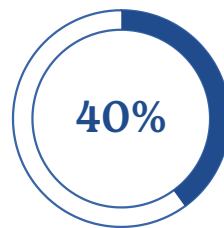


Results



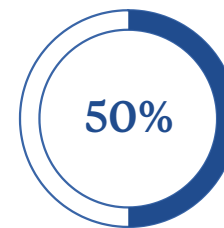
Efficiency Increase

Automated monthly mass billing with Accounting Seed, along with Prospect and matter management processes, resulted in a **50% increase in operational efficiency**, minimizing errors and improving workflow in handling legal cases.



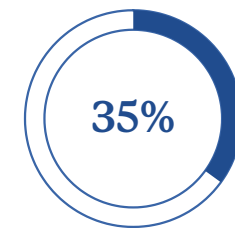
Productivity Boost

Automating billing, task management, and matter management through Flow and custom validation logic optimized routine operations, leading to a **45% improvement in overall productivity**.



Integration Efficiency

The integration of Salesforce with iManage and HubSpot enhanced system-wide collaboration, resulting in a **50% improvement in productivity and data accuracy**. This integration allowed for smoother workflows, better event and matter management.



Speed Enhancement

Automation and integration significantly reduced the time required for billing, matter processing, and enhancing speed by **35%**.

Our Partners

We are esteemed partners of best AppExchange products. This provides us an edge and access to partner ecosystem that are designed to support and help customers in their complex business needs.

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sync cirrus insight gridbuddy **Chargent**
PAYMENT PROCESSING FOR SALESFORCE wm
webmerge Active
Campaign > 123 FORM
BUILDER S
DRIVE blackthorn FORM
ASSEMBLY

Testimonials



Vincent Croser

-Vice President, Sales & Marketing

Twopir Consulting is a hardworking company, exceptionally knowledgeable, and always willing to go the extra mile to support me. Their communication is top-notch, and they consistently deliver on time and within budget. I couldn't be more impressed. Their ability to solve complex challenges while maintaining a high level of professionalism truly sets them apart. Whether it's handling intricate technical issues or providing strategic guidance, Twopir Consulting exceeds expectations every time. I highly recommend them to anyone looking for a reliable and skilled partner.



Benedict Texeira

-Chief Operating Officer

Twopir Consulting played a crucial role in customizing our Salesforce CRM. They managed the project effectively, keeping us informed and ensuring that all milestones were achieved on time. Their expertise in Salesforce allowed them to tailor the CRM to our specific real estate needs, resulting in a highly functional and efficient system. Twopir Consulting ensured smooth data flow and promptly resolved any issues that arose.



Mary H. Lex

- Senior Marketing Executive

Upon meeting the team, I checked references and received high praise. With extensive Salesforce experience, I confidently affirm Twopir Consulting's excellence. They swiftly crafted a custom automation workflow, despite vague specifications. Working tirelessly, they ensured project success and provided invaluable assistance. Their expertise in configuring and optimizing Salesforce has significantly improved our automation and customer relationship management processes. Trust your project to the team for exceptional results.



For more information, contact support@twopirconsulting.com

Thank you for your interest in TwoPir Consulting Pvt Ltd. To learn more about our services and how we can elevate your Salesforce experience, please get in touch with our team. We are here to answer any questions you may have and provide tailored solutions to meet your unique business needs. Reach out to us today!

Visit our website: www.twopirconsulting.com

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