

Why do it manually when you can automate!

# CROSS-TEAM INTEGRATION & AUTOMATION



## THE CLIENT

- Professional Services
- Systems: Jira, QuickBooks Online, Salesforce
- Company size: <25 employees

Professional Services



SMB



Data



Process Automation



Customer 360



## THE PROCESS

Sending out invoices to clients can be an arduous process - at least that's what our client thought! As a professional services organization, our client enters time spent, and bills clients monthly based on that time. This entailed a lot of reporting, exporting, aggregating, importing, and cross-checking. The Cordona team created a hosted solution that leveraged published APIs to transfer data and sync it with Invoices in the QuickBooks system. As part of the build-out, the client also requested a review functionality in their CRM, Salesforce, to provide a 360-degree client account view. Cordona leveraged our proprietary Salesforce/QBO integration to seamlessly link in the third system, and coordinating data across Sales, Accounting, and Delivery teams.

“The integration project was a game-changer for our business - our speed to invoice went down drastically and billing errors are non-existent now.”



## THE COST

\$12,000, including  
1 year of hosting

## THE CHALLENGES

- Manual billing and invoicing process was error-prone and time consuming
- Monthly invoicing required reconciliation of data across 3 systems
- Different departments had no visibility into key client data points
- Small business owners wearing multiple hats spread thin during monthly billing cycles

## THE OUTCOMES

- Monthly billing completion decreased from 6-8 hours, monthly, to ~10 minutes month
- Highly scalable new process
- Errors in billing data decreased 'drastically' with manual data entry and reconciliation
- 360° Client view across Sales, Delivery, and Accounting teams
- Enhanced review process

FOR MORE INFORMATION, PLEASE REACH OUT AT [HELLO@COORDONA.COM](mailto:HELLO@COORDONA.COM)