InvoicePro – Automated Invoice & Payment Reminder CRM

■ Industry: Finance / Business Services

■ Target Users: Small & Medium Enterprises (SMEs), Finance Teams, Sales Teams

■■ Project Type: B2B Salesforce CRM Implementation

■ Problem Statement

- Duplicate Invoice Records: Manual invoice entry creates duplicate records, leading to errors in accounting and reconciliation.
- Missed Payment Reminders: Finance teams manually follow up with customers, which is time-consuming and often inconsistent, resulting in delayed collections.
- Cash Flow Issues: Without proper tracking of pending and overdue payments, businesses struggle to maintain steady cash flow.
- Lack of Real-Time Visibility: Managers cannot easily track financial performance, leading to poor decision-making.

■ To solve this, businesses need a Salesforce CRM solution that automates invoice creation, prevents duplicates, sends timely email reminders, and provides dashboards for finance teams and management.

■ Phase 1: Problem Understanding & Industry Analysis

1. Requirement Gathering

Business Needs:

- Automate invoice creation and payment reminders.
- Prevent duplicate invoices to maintain data accuracy.
- Provide finance teams with real-time dashboards for tracking payments.
- Reduce dependency on manual email follow-ups.

Functional Requirements:

- Auto-generate invoices when a sales opportunity is closed.
- Validate invoice numbers to prevent duplicates.
- Send emails: Invoice Email (on creation), Payment Due Reminder (3 days before due date), Overdue Payment Alert (on deadline miss).
- Provide dashboards for Pending, Paid, and Overdue invoices.

Non-Functional Requirements:

- Reliable and scalable automation to handle growing data.
- Easy-to-use interface for finance teams.
- Secure handling of customer and payment records.

2. Stakeholder Analysis

- Finance Team (Primary Users): Create invoices, monitor payments, handle overdue alerts.
- Sales Team (Secondary Users): Initiate invoice process after deal closure.
- Business Owners/Managers (Decision Makers): Use dashboards and reports for decision-making.
- System Admin (Support Role): Configure flows, rules, and maintain Salesforce org health.

3. Business Process Mapping

Current Manual Flow:

- Sales team closes a deal.
- Finance team manually prepares invoices (Excel/Word).
- Emails are drafted and sent manually.
- Payment reminders are inconsistent → leading to late collections.

Proposed Automated Flow in Salesforce:

- Deal is marked as “Closed-Won.”
- Invoice auto-generated in Salesforce.
- Validation prevents duplicate invoice numbers.
- Automatic email sent with invoice details.
- System sends payment reminder 3 days before due date.
- Overdue alert sent if payment is missed.
- Finance dashboard tracks invoice status (Paid, Pending, Overdue).

4. Industry-Specific Use Case Analysis

- SMEs: Automating invoices reduces manual workload and human error.
- Retail/Distribution Firms: High-volume invoicing benefits from duplicate prevention and reminders.
- Service Providers: Require recurring invoicing and timely payment follow-ups.
- B2B Companies: Depend on streamlined invoice approval and customer communication.

5. AppExchange Exploration

- Conga Composer: For advanced invoice templates.
- FinancialForce Billing: For enterprise-level billing needs.
- AppExchange Reminder Utilities: For customizable email alerts.
- Decision for this Project: Focus on Salesforce-native automation (Flows, Validation Rules, Apex Batch Jobs) to keep the project scope simple and avoid external dependencies.