

Billing Software Documentation

Built for CS Professionals to Simplify Invoicing & Financial Management

1. Project Overview

- **Name:**

Easy Billing

- **Description:**

A cloud-based digital billing platform tailored for Company Secretaries (CS) to automate invoice generation, manage clients, track financial analytics, and securely handle billing records – all in one place.

- **Target Audience:**

Company Secretaries (CS Professionals), Finance Managers, Billing Administrators.

2. Technology Stack

Layer	Technology
Frontend	React.js, HTML5, Tailwind CSS, JavaScript
Backend	Node.js, Express.js
Database	MongoDB Atlas
Auth & Security	JWT Tokens
PDF Generation	React-PDF

3. Core Features

➤ Centralized Client & Company Management

A robust client and company database designed for CS professionals to streamline recordkeeping:

- **Full CRUD Support:** Easily create, view, update, and delete client company details.
- **Billing History:** Access the complete invoice history of each client, with filters for month, year, or client name.
- **Payment Tracking:** Automatically track invoice status — paid, partially paid, or pending — for each client.
- **Contact Management:** Store and retrieve essential details like company email, contact person, GST number, and phone number, all in a structured interface.

➤ Real-Time Dashboard & Financial Analytics

A data-driven dashboard to help CS professionals monitor financial performance with clarity:

- **Monthly and Yearly Insights:** View aggregated KPIs such as:
 - Total Billed Amount
 - Total Pending Payments
 - Total Payments Received
 - Active Client Count
- **Data Visualization:** Charts and graphs render financial trends over time for better business decisions.
- **Client-Level Summary:** Quickly assess financial health per client based on billing volume and payment status.

➤ One-Click PDF Invoicing & Email Integration

Generate and send professional invoices in seconds:

- **React-PDF Based Templates:** Professionally formatted invoices are dynamically generated.
- **One-Click Email Dispatch:** Invoices are emailed directly to each client's registered email address.
- **Consistency & Speed:** Automates repetitive tasks, reduces manual errors, and increases client satisfaction.

➤ User Authentication & Secure Access

Enterprise-grade security for user and data protection:

- **JWT-Based Authentication:** Ensures secure and stateless login/logout processes.
- **Role-Based Access:** Different user roles can access tailored features depending on their subscription level.
- **Restricted Routes:** All sensitive routes and components are protected for authenticated users only.

➤ Subscription Plans & Razorpay Payment Integration

Flexible, scalable access to suit different user needs:

- **Three-Tier Subscription Plans:** Users choose between Starter, Pro, and Premium packages directly from the portfolio website.
- **Razorpay Integration:** Secure and reliable payment gateway handles subscription payments.
- **Access Control:** Only subscribed users gain access to the main billing dashboard and premium features.

➤ Cloud-Based & Scalable Architecture

Modern tech stack ensures performance, reliability, and expansion potential:

- **MongoDB Atlas Hosting:** Ensures high availability, remote access, and secure data storage.
- **MERN Stack Foundation:** Built on MongoDB, Express.js, React.js, and Node.js — ensuring responsiveness and scalability.
- **Mobile/Web Ready:** Designed for future expansion into mobile applications and cross-platform usability.

➤ Historical Invoice Archive & Compliance

Robust archival and recordkeeping for audits and regulatory purposes:

- **Auto-Save as PDF:** Every generated invoice is saved in PDF format to the cloud database.
- **Download & Review:** Users can download any invoice individually at any time.
- **Audit-Friendly:** Preserves structured invoice data, aiding year-end reconciliation and tax filings.

4. Architecture Overview

▪ High-Level Flow:

1. **Portfolio Website**
 - Marketing, Plan Selection, User Signup/Login
 - Authenticated users can subscribe to plans.
2. **Billing Dashboard**
 - Initial Setup: CS Name, Company Name, Contact Details
 - Client Management (CRUD)
 - Invoice Creation & Tracking
 - Financial Analytics & PDF Download

5. Modules Breakdown

➤ Authentication & Authorization Module

Handles secure user access and identity management:

- **User Registration & Login:** Enables new users to create an account or log in with their credentials.
- **JWT Token Generation:** Implements secure token-based authentication to protect routes and ensure session security.
- **Role-Based Access Control (RBAC):** Grants or restricts access to specific features based on user role (e.g., basic user, premium subscriber).
- **Protected Routes:** Ensures only authenticated users can access dashboard, client data, and sensitive APIs.

➤ Subscription & Payment Module

Manages user subscriptions, payments, and access rights:

- **Plan Management:** Offers three-tiered subscription options (Starter, Pro, Premium) tailored to different needs.
- **Razorpay Integration:** Seamless integration with Razorpay for secure and efficient payment handling.
- **Access Control Logic:** Automatically grants access to premium features post-payment.
- **Plan Validation:** Validates subscription status on login and restricts dashboard access for unsubscribed users.

➤ Client & Company Management Module

Provides structured CRUD functionality for managing client company data:

- **Client Onboarding:** Allows users to add new client companies with relevant details like name, contact, GSTIN, etc.
- **Edit & Update:** Modify existing client information as needed for accuracy or changes.
- **Delete & Archive:** Remove inactive clients or companies from the active database.
- **Centralized Dashboard View:** Enables quick access to each client's billing history and outstanding balances.

➤ Invoice Management Module

Handles generation, delivery, and storage of professional invoices:

- **Dynamic Invoice Creation:** Users can create GST-style invoices with customized fields (client name, service, amount, etc.).
- **PDF Generation (React-PDF):** Automatically generates invoices as downloadable PDFs with professional formatting.
- **Email Integration:** Sends generated invoices directly to the client's registered email with a single click.
- **Payment History Tracking:** Records all payments (full or partial) received for each invoice.

➤ Analytics & Reporting Dashboard

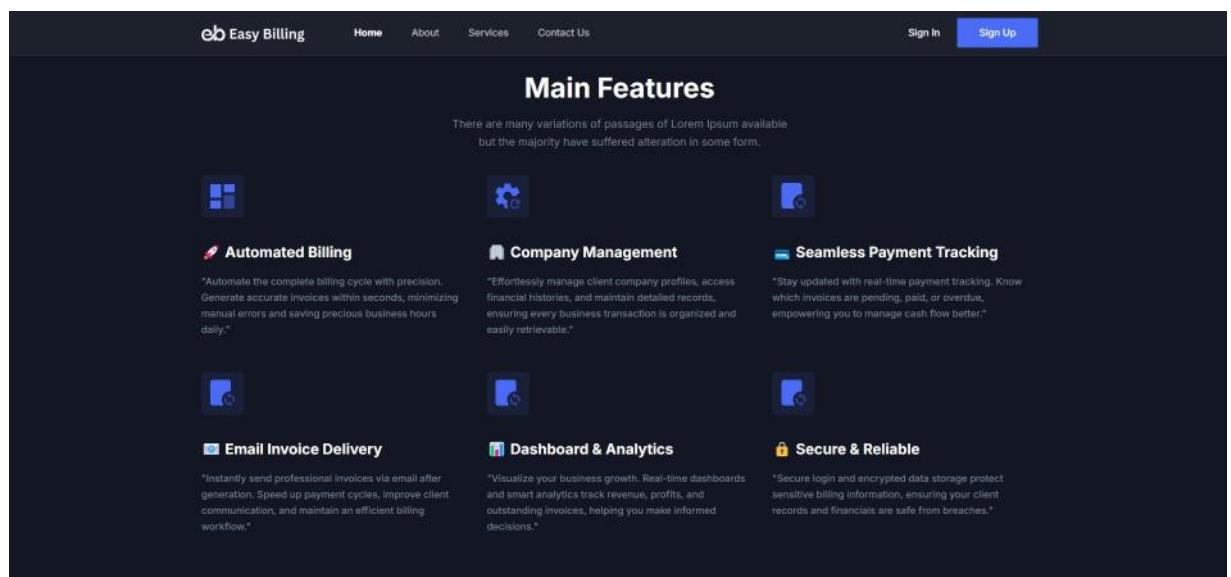
Provides real-time visibility into financial metrics and operational performance:

- **KPI Display:** Visualizes key indicators such as Total Billed Amount, Total Payments Received, Pending Amount, and Client Count.
- **Time-Based Filters:** Users can filter financial data by monthly, yearly, or custom date ranges.
- **Graphical Reports:** Charts and graphs help users quickly interpret performance trends.
- **Client-Specific Insights:** Drill down into individual client financial summaries for targeted decision-making.

6. Screenshots & UI Flow

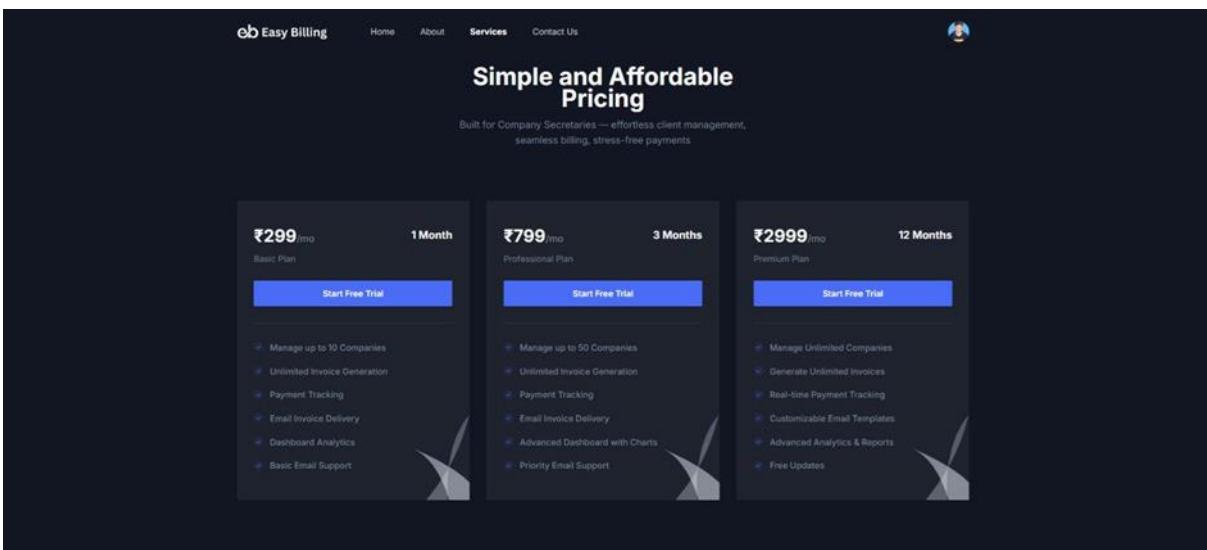
- Portfolio homepage
- Plan selection
- Dashboard UI
- Company Profile Page
- Invoice preview
- Payment Status
- Invoice List
- Analytics charts

- Portfolio homepage

Feature	Description
Automated Billing	"Automate the complete billing cycle with precision. Generate accurate invoices within seconds, minimizing manual errors and saving precious business hours daily."
Company Management	"Effortlessly manage client company profiles, access financial histories, and maintain detailed records, ensuring every business transaction is organized and easily retrievable."
Seamless Payment Tracking	"Stay updated with real-time payment tracking. Know which invoices are pending, paid, or overdue, empowering you to manage cash flow better."
Email Invoice Delivery	"Instantly send professional invoices via email after generation. Speed up payment cycles, improve client communication, and maintain an efficient billing workflow."
Dashboard & Analytics	"Visualize your business growth. Real-time dashboards and smart analytics track revenue, profits, and outstanding invoices, helping you make informed decisions."
Secure & Reliable	"Secure login and encrypted data storage protect sensitive billing information, ensuring your client records and financials are safe from breaches."

- Plan selection

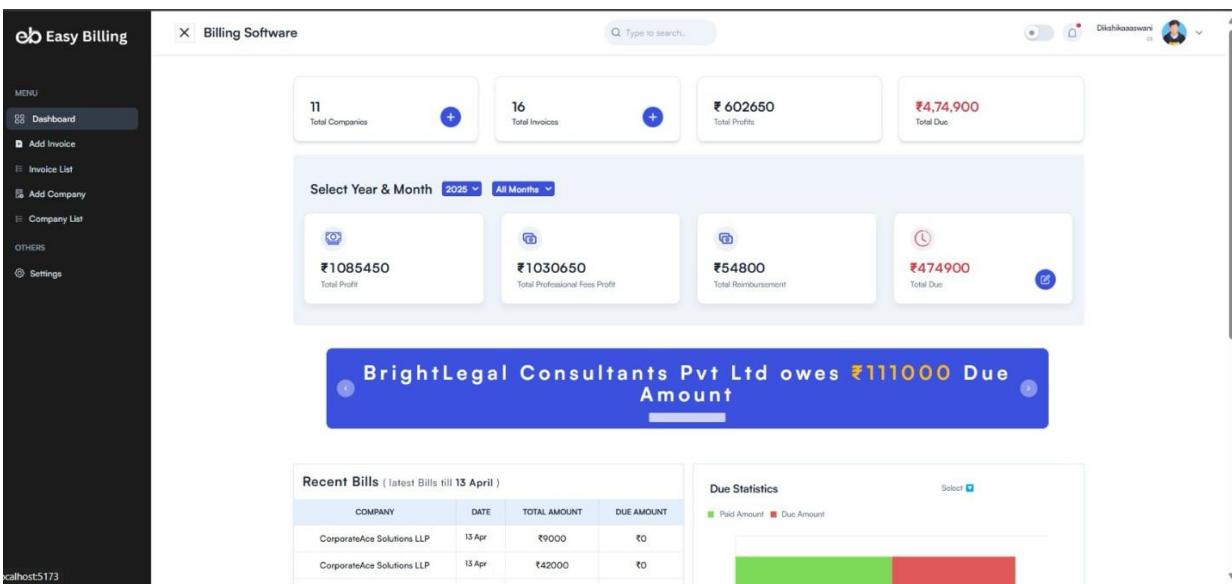


Simple and Affordable Pricing

Built for Company Secretaries — effortless client management, seamless billing, stress-free payments

₹299/mo	1 Month	₹799/mo	3 Months	₹2999/mo	12 Months
Basic Plan		Professional Plan		Premium Plan	
Start Free Trial		Start Free Trial		Start Free Trial	
<ul style="list-style-type: none"> Manage up to 10 Companies Unlimited Invoice Generation Payment Tracking Email Invoice Delivery Dashboard Analytics Basic Email Support 		<ul style="list-style-type: none"> Manage up to 50 Companies Unlimited Invoice Generation Payment Tracking Email Invoice Delivery Advanced Dashboard with Charts Priority Email Support 		<ul style="list-style-type: none"> Manage Unlimited Companies Generate Unlimited Invoices Real-time Payment Tracking Customizable Email Templates Advanced Analytics & Reports Free Updates 	

- Dashboard UI



Billing Software

MENU

- Dashboard
- Add Invoice
- Invoice List
- Add Company
- Company List
- Others
- Settings

Dikshaaswani

Recent Bills (Latest Bills till 15 April)

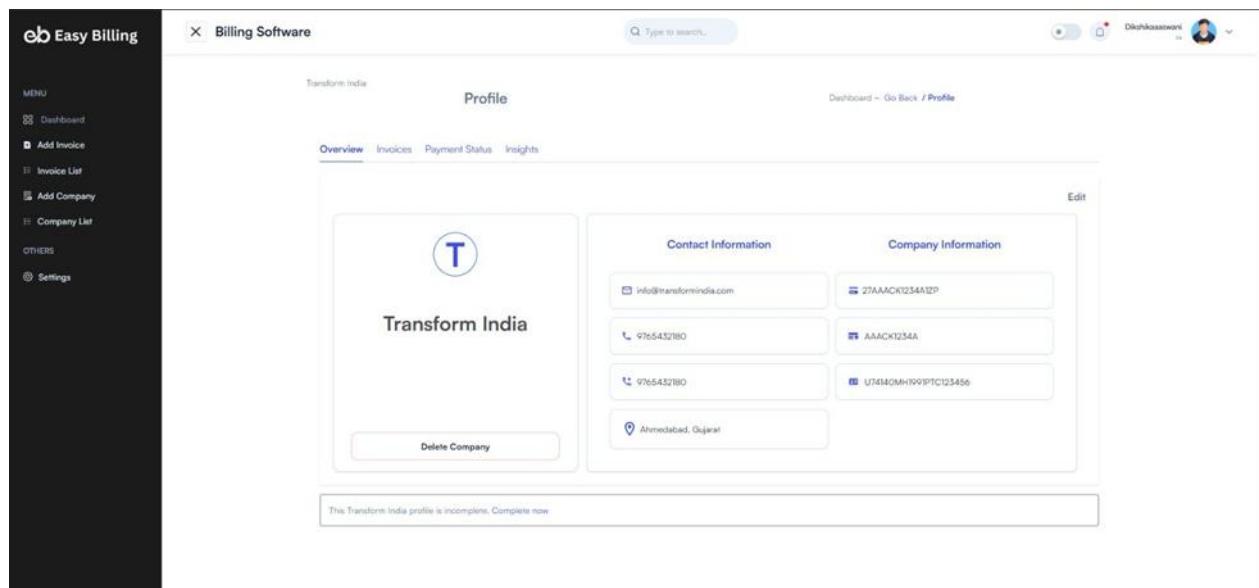
COMPANY	DATE	TOTAL AMOUNT	DUED AMOUNT
CorporateAce Solutions LLP	15 Apr	₹9000	₹0
CorporateAce Solutions LLP	15 Apr	₹42000	₹0

Due Statistics

Paid Amount Due Amount

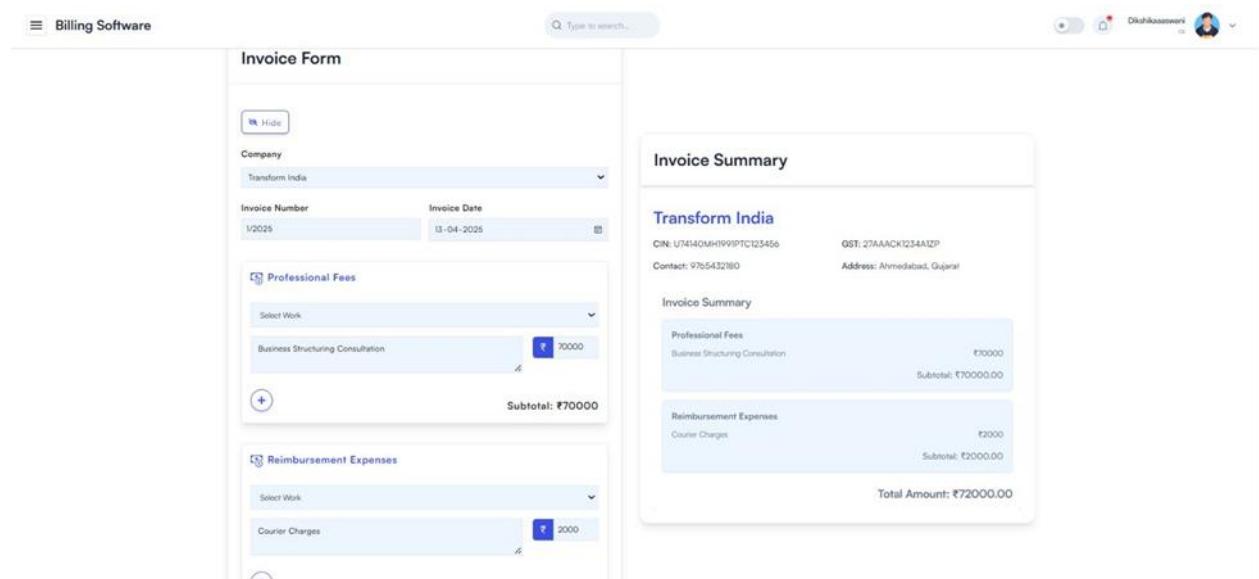
BrightLegal Consultants Pvt Ltd owes ₹111000 Due Amount

- Company Profile Page



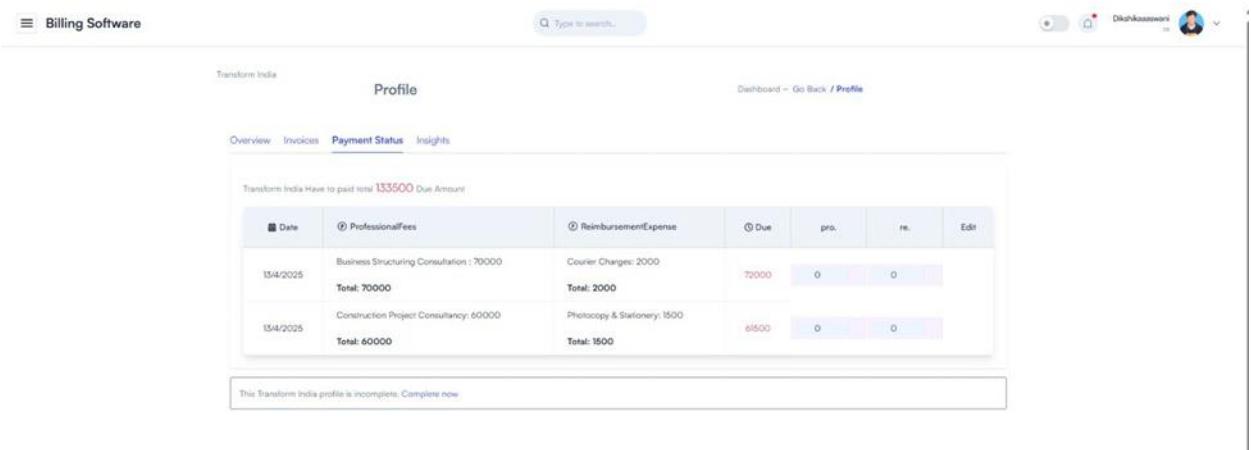
The screenshot shows the 'Profile' section of the 'Billing Software'. On the left, there's a dark sidebar with the 'eb Easy Billing' logo and a navigation menu including 'Dashboard', 'Add Invoice', 'Invoice List', 'Add Company', 'Company List', 'OTHERS', and 'Settings'. The main area has a header with 'X Billing Software', a search bar, and a user profile for 'Dikshasawari'. Below the header, it says 'Transform India' and 'Profile'. There are tabs for 'Overview', 'Invoices', 'Payment Status', and 'Insights'. A large card displays a blue 'T' icon and the company name 'Transform India'. To the right, there are two sections: 'Contact Information' and 'Company Information'. 'Contact Information' includes fields for email (info@transformindia.com), phone (9765432180), and address (Ahmedabad, Gujarat). 'Company Information' includes fields for GST (27AAACK1234A1ZP), PAN (AAACK1234A), and CIN (U74140MH1999PTC123456). A note at the bottom says 'This Transform India profile is incomplete. Complete now.' An 'Edit' button is located at the top right of the contact information section.

- Invoice preview



The screenshot shows the 'Invoice Form' and 'Invoice Summary' sections. The 'Invoice Form' on the left has a 'Hide' button and a 'Company' dropdown set to 'Transform India'. It shows an 'Invoice Number' (I/2025) and 'Invoice Date' (13-04-2025). Under 'Professional Fees', there's a dropdown for 'Select Work' with 'Business Structuring Consultation' and a value of ₹70000. A '+' button is available for adding more items. The 'Subtotal: ₹70000' is displayed. Under 'Reimbursement Expenses', there's a dropdown for 'Select Work' with 'Courier Charges' and a value of ₹2000. A '+' button is available for adding more items. The 'Subtotal: ₹2000.00' is displayed. The 'Invoice Summary' on the right shows the breakdown of charges: Professional Fees (Business Structuring Consultation ₹70000, Subtotal ₹70000.00) and Reimbursement Expenses (Courier Charges ₹2000, Subtotal ₹2000.00). The 'Total Amount: ₹72000.00' is shown at the bottom. The 'Transform India' company details are also listed in the summary: CIN: U74140MH1999PTC123456, GST: 27AAACK1234A1ZP, Contact: 9765432180, Address: Ahmedabad, Gujarat.

- Payment Status

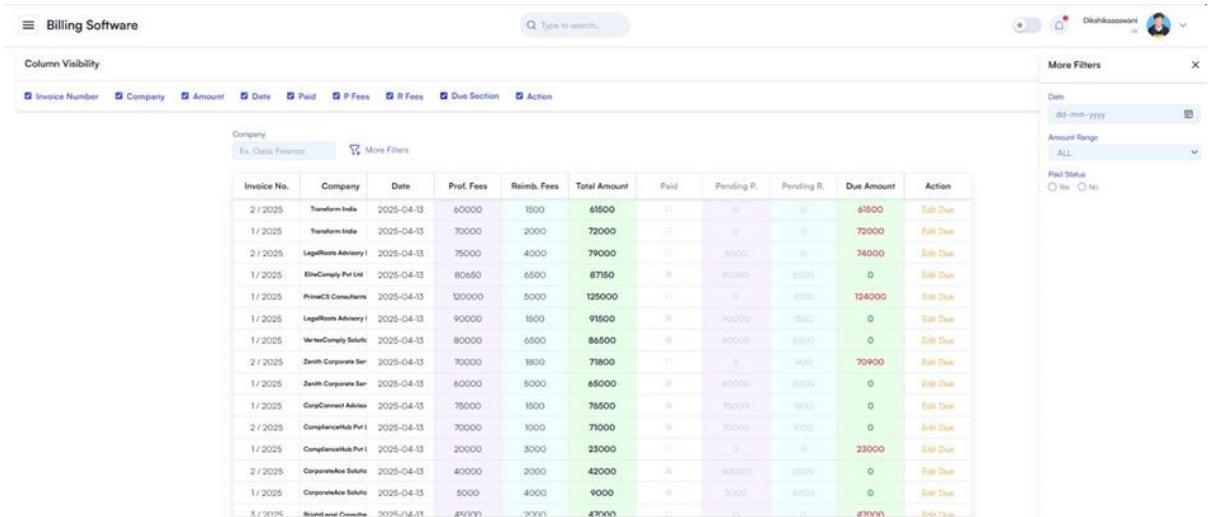


The screenshot shows the 'Payment Status' section of the 'Profile' page for 'Transform India'. There are two invoices listed:

Date	Professional Fees	Reimbursement Expense	Due	pro.	re.	Edit
13/4/2025	Business Structuring Consultation : 70000 Total: 70000	Courier Charges: 2000 Total: 2000	72000	0	0	
13/4/2025	Construction Project Consultancy: 60000 Total: 60000	Photocopy & Stationery: 1500 Total: 1500	61500	0	0	

A message at the bottom states: "This Transform India profile is incomplete. Complete now."

- Invoice List



The screenshot shows the 'Invoice List' page. The table includes the following columns:

Invoice No.	Company	Date	Prof. Fees	Reimb. Fees	Total Amount	Paid	Pending P.	Pending R.	Due Amount	Action
2 / 2025	Transform India	2025-04-13	60000	1500	61500	0	0	0	61500	Edit Due
1 / 2025	Transform India	2025-04-13	70000	2000	72000	0	0	0	72000	Edit Due
2 / 2025	LegalRrats Advisory I	2025-04-13	75000	4000	79000	0	5000	0	74000	Edit Due
1 / 2025	EliteComply Pvt Ltd	2025-04-13	80650	6500	87150	0	80650	0	0	Edit Due
1 / 2025	PrimeRats Consultants	2025-04-13	120000	5000	125000	0	0	10000	124000	Edit Due
1 / 2025	LegalRrats Advisory I	2025-04-13	90000	1500	91500	0	90000	1500	0	Edit Due
1 / 2025	VarinComply Solvif	2025-04-13	80000	6500	86500	0	80000	6500	0	Edit Due
2 / 2025	Zenith Corporate Ser	2025-04-13	70000	1800	71800	0	0	900	70900	Edit Due
1 / 2025	Zenith Corporate Ser	2025-04-13	60000	5000	65000	0	60000	5000	0	Edit Due
1 / 2025	CorpConnect Adviso	2025-04-13	75000	1500	76500	0	75000	1500	0	Edit Due
2 / 2025	ComplianceHub Pvt I	2025-04-13	70000	1000	71000	0	70000	1000	0	Edit Due
1 / 2025	ComplianceHub Pvt I	2025-04-13	20000	3000	23000	0	0	0	23000	Edit Due
2 / 2025	CorporateRats Solvif	2025-04-13	40000	3000	42000	0	40000	3000	0	Edit Due
1 / 2025	CorporateRats Solvif	2025-04-13	5000	4000	9000	0	5000	4000	0	Edit Due
3 / 2025	BusinessLaw Consulta	2025-04-13	45000	2000	47000	0	0	0	47000	Edit Due

- Analytics charts

