

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**

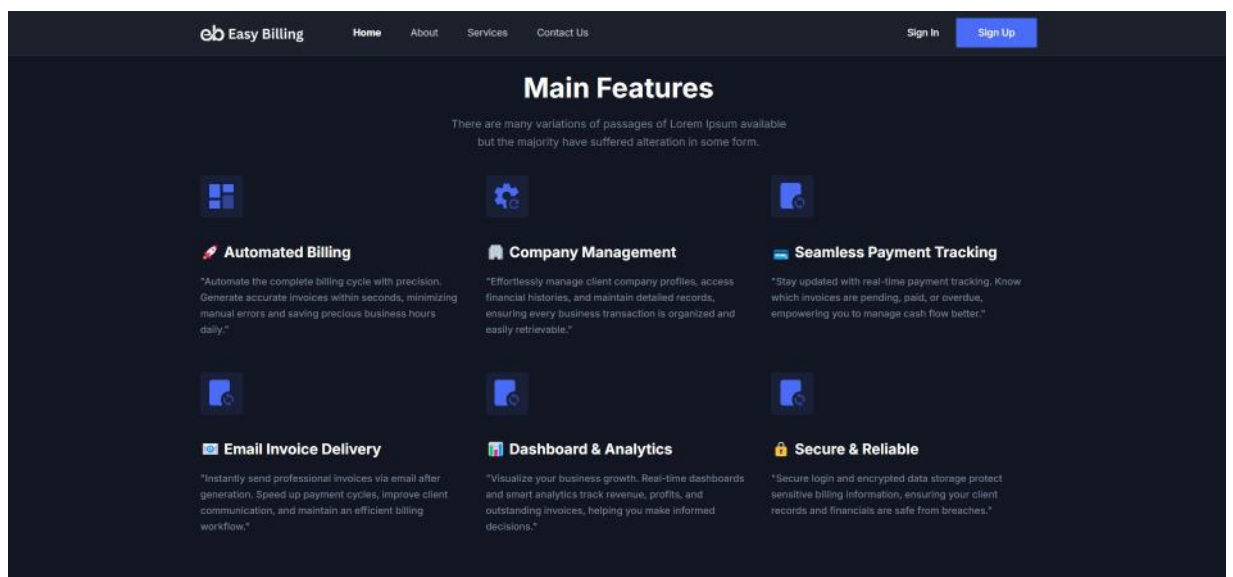
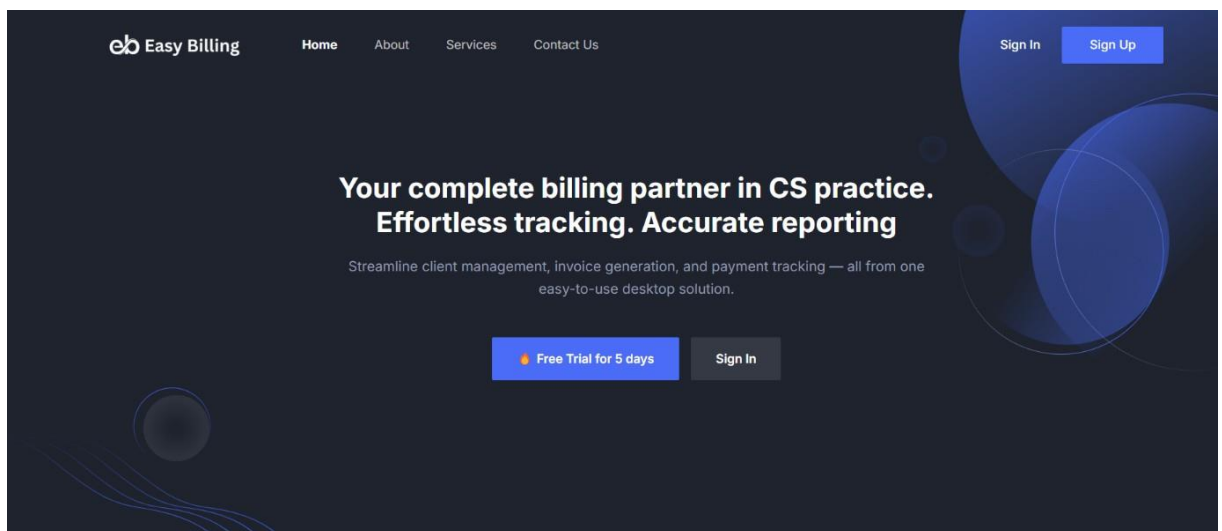
Provides real-time visibility into financial metrics and operational performance:

- **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.

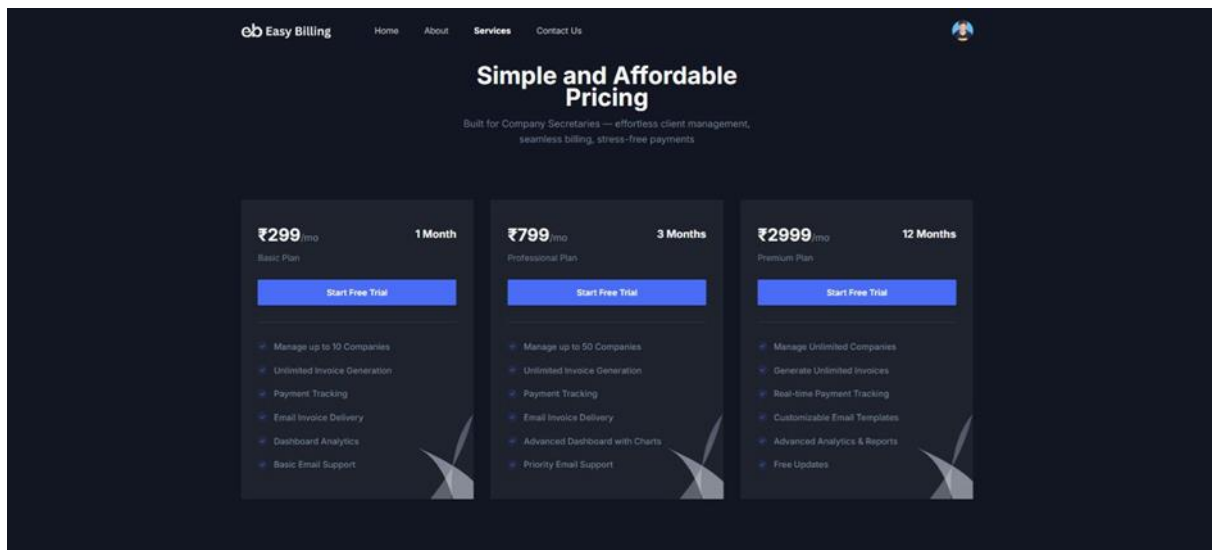
6. Screenshots & UI Flow

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

- Portfolio homepage



- Plan selection



Simple and Affordable Pricing
Built for Company Secretaries — effortless client management, seamless billing, stress-free payments.

Plan	Price	Duration
Basic Plan	₹299/mo	1 Month
Professional Plan	₹799/mo	3 Months
Premium Plan	₹2999/mo	12 Months

Basic Plan Features:

- Manage up to 10 Companies
- Unlimited Invoice Generation
- Payment Tracking
- Email Invoice Delivery
- Dashboard Analytics
- Basic Email Support

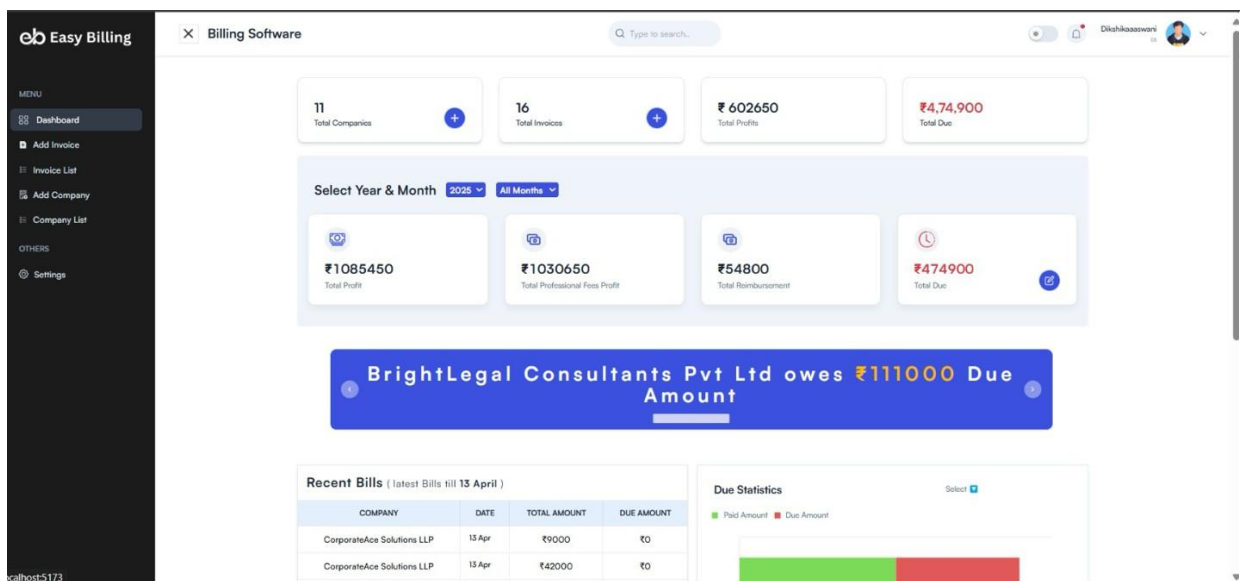
Professional Plan Features:

- Manage up to 50 Companies
- Unlimited Invoice Generation
- Payment Tracking
- Email Invoice Delivery
- Advanced Dashboard with Charts
- Priority Email Support

Premium Plan Features:

- Manage Unlimited Companies
- Generate Unlimited Invoices
- Real-time Payment Tracking
- Customizable Email Templates
- Advanced Analytics & Reports
- Free Updates

- Dashboard UI



Billing Software

11 Total Companies | 16 Total Invoices | ₹602650 Total Profit | ₹4,74,900 Total Due

Select Year & Month: 2025 | All Months

₹1085450 Total Profit | ₹1030650 Total Professional Fees Profit | ₹54800 Total Reimbursement | ₹474900 Total Due

BrightLegal Consultants Pvt Ltd owes ₹111000 Due Amount

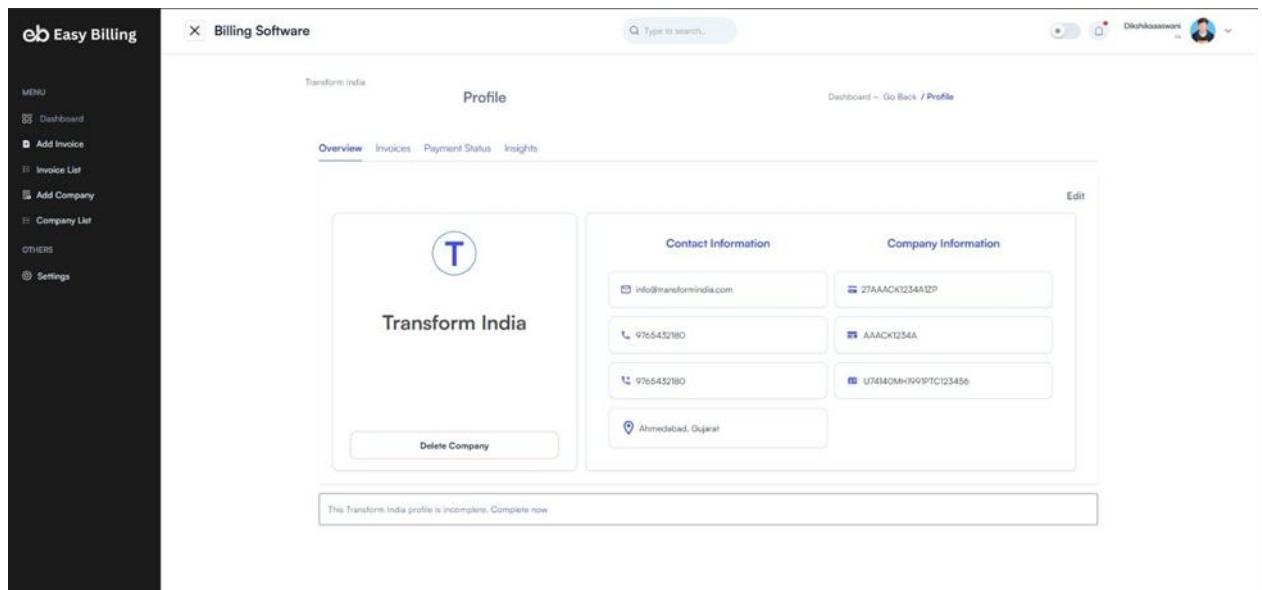
COMPANY	DATE	TOTAL AMOUNT	DUE AMOUNT
CorporateAce Solutions LLP	13 Apr	₹9000	₹0
CorporateAce Solutions LLP	13 Apr	₹42000	₹0

Due Statistics

Paid Amount | Due Amount

calhost5173

- Company Profile Page



eb Easy Billing | Billing Software | Transform India | Profile | Dashboard - Go Back / Profile

Transform India

Contact Information

- info@transformindia.com
- 9765432180
- 9765432180
- Ahmedabad, Gujarat

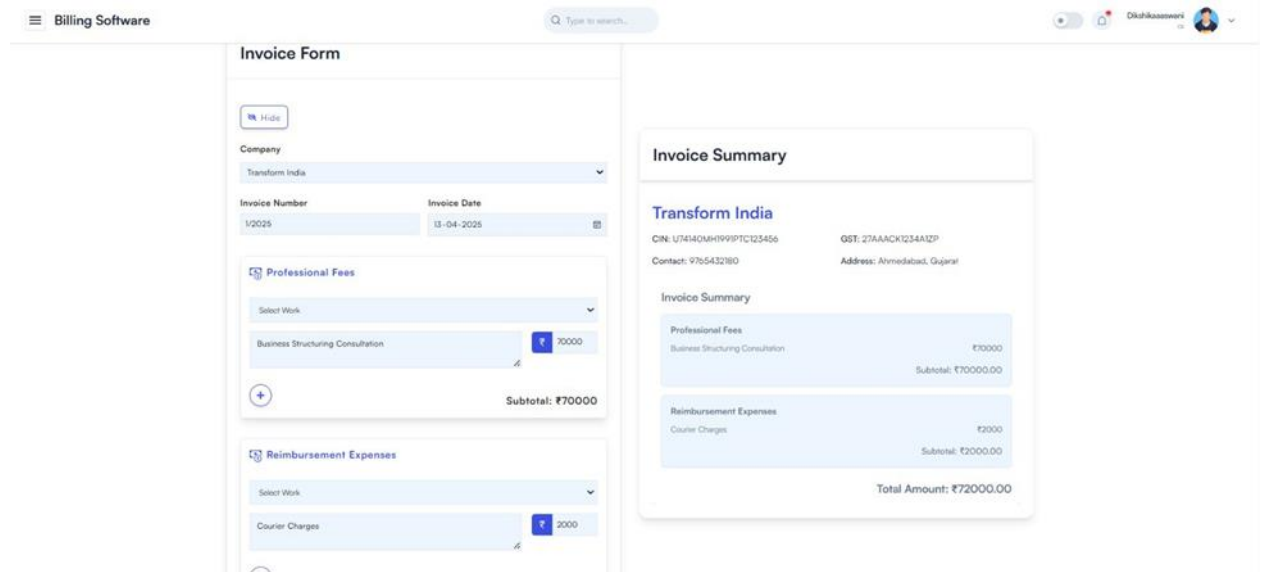
Company Information

- 27AAACK1234A1ZP
- AAACK1234A
- U78140MH1999PTC123456

Delete Company

This Transform India profile is incomplete. Complete now

- Invoice preview



Billing Software | Invoice Form | Invoice Summary

Company
Transform India

Invoice Number
1/2025

Invoice Date
13-04-2025

Professional Fees

Select Work	Amount
Business Structuring Consultation	₹ 70000

Subtotal: ₹70000

Reimbursement Expenses

Select Work	Amount
Courier Charges	₹ 2000

Invoice Summary

Transform India

CIN: U78140MH1999PTC123456 | GST: 27AAACK1234A1ZP
Contact: 9765432180 | Address: Ahmedabad, Gujarat

Category	Item	Amount
Professional Fees	Business Structuring Consultation	₹10000
	Subtotal:	₹70000.00
Reimbursement Expenses	Courier Charges	₹2000
	Subtotal:	₹2000.00
Total Amount:		₹72000.00

- Payment Status

Billing Software

Transform India

Profile

Dashboard - Go Back / Profile

Overview Invoices **Payment Status** Insights

Transform India Have to paid total **133500** Due Amount

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	

This Transform India profile is incomplete. Complete now

- Invoice List

Billing Software

Column Visibility

Invoice Number Company Amount Date Paid P Fees R Fees Due Section Action

Company

Ex. Dash Finance More Filters

Invoice No.	Company	Date	Prof. Fees	Reimb. Fees	Total Amount	Paid	Pending R.	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	LegalRocks 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	PrimeCS Consultants	2025-04-13	120000	5000	125000	0	0	0	124000	Edit Due
1 / 2025	LegalRocks Advisory I	2025-04-13	90000	1500	91500	0	90000	1500	0	Edit Due
1 / 2025	VeritasComply Solu	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	CorporateAce Solu	2025-04-13	40000	2000	42000	0	40000	2000	0	Edit Due
1 / 2025	CorporateAce Solu	2025-04-13	5000	4000	9000	0	5000	4000	0	Edit Due
3 / 2025	Bookend and Connect	2025-04-13	45000	2000	47000	0	0	0	47000	Edit Due

More Filters

Date: dd-mm-yyyy

Amount Range: ALL

Paid Status: ☐ Yes ☐ No

- Analytics charts

