**Invoicerly DIY Implementation Guide, Cost Breakdown & Business Plan**

**📍 Overview**

This guide will walk you through the **step-by-step process of setting up Invoicerly yourself**, minimizing costs while still automating the invoicing process via **WhatsApp, Google Sheets, and automation tools like Zapier or Make.com**.

**Step 1: Setting Up WhatsApp Business API (Cost: $0 - $50)**

**What This Does:**

Enables automatic invoice processing when users send messages via WhatsApp.

**How to Set It Up:**

1. **Sign up for WhatsApp Business API:**
   * Go to [Twilio WhatsApp API](https://www.twilio.com/whatsapp) and create an account.
   * Apply for API access (approval takes 48 hours).
   * Set up a Twilio phone number for WhatsApp messaging.
2. **Alternatively, use WATI or Gupshup (Easier setup but paid):**
   * Sign up at [WATI.io](https://wati.io/) or [Gupshup](https://www.gupshup.io/).
   * Connect your WhatsApp Business number.
   * Set up automated responses for invoice generation.

📌 **DIY Savings:** Up to **$1,500** (vs. hiring a developer for API integration).

**Online Guidance & Tutorials:**

* [WhatsApp API Docs](https://developers.facebook.com/docs/whatsapp)
* [Twilio WhatsApp API Setup Guide](https://www.twilio.com/docs/whatsapp)
* [WATI API Guide](https://support.wati.io/)

**Step 2: Automating Invoice Creation (Google Sheets + Email API)**

**What This Does:**

Creates invoices automatically when a user messages Invoicerly via WhatsApp.

**How to Set It Up:**

1. **Create a Google Sheets Invoice Template:**
   * Open [Google Sheets](https://docs.google.com/spreadsheets/).
   * Set up columns: **Client Name, Email, Amount, Service Details, Invoice #, Payment Status.**
   * Use built-in formulas to calculate totals, GST, or discounts.
2. **Use Google Apps Script to Auto-Generate PDF Invoices:**
   * Click Extensions > Apps Script in Google Sheets.
   * Paste the script from this guide: [Google Sheets to PDF](https://www.labnol.org/internet/google-sheets-invoice-generator/32230/).
   * Save and enable execution permissions.
3. **Automate Invoice Email Sending:**
   * Use [Zapier](https://zapier.com/) or [Make.com](https://www.make.com/) to trigger an email when an invoice is generated.
   * Connect with **SendGrid API** or Gmail for automatic delivery.

📌 **DIY Savings:** Up to **$5,000** (vs. developing a custom invoicing system).

**Online Guidance & Tutorials:**

* [Zapier Google Sheets Integration](https://zapier.com/apps/google-sheets/integrations)
* [Google Apps Script Documentation](https://developers.google.com/apps-script)
* [Automating PDFs in Google Sheets](https://www.labnol.org/internet/google-sheets-invoice-generator/32230/)

**Step 3: Progressive Task Logging & End-of-Month Invoicing**

**What This Does:**

Allows users to progressively **log tasks throughout the month** via WhatsApp and then generate a **consolidated invoice at the end of the month**.

**How to Set It Up:**

1. **Create a Google Sheets Database for Task Logging:**
   * Each user has a **dedicated Google Sheet** where tasks are logged.
   * Set up columns: **Client Name, Task Description, Time Spent, Date, Rate, Status (Saved/Invoiced).**
2. **Automate Task Logging via WhatsApp:**
   * Use **Zapier or Make.com** to capture WhatsApp messages.
   * Store each **logged task into Google Sheets**.
3. **Generate End-of-Month Invoices:**
   * At the end of the month, users send:

**“Invoice FFH for all saved tasks this month.”**

* + The system **retrieves all logged tasks** and auto-calculates total billable hours.
  + A **PDF invoice is generated and emailed to the client.**

📌 **DIY Savings:** Up to **$4,000** (vs. custom-built CRM task-tracking system).

**Online Guidance & Tutorials:**

* [Zapier WhatsApp Integration](https://zapier.com/apps/whatsapp/integrations)
* [Google Sheets Automation with Make.com](https://www.make.com/en/integrations/google-sheets)

**📍Projected Business Valuation If Acquired by a Big Player**

**Factors That Determine Acquisition Price**

* **User Base Growth**: Higher active users = higher valuation.
* **Annual Recurring Revenue (ARR)**: Subscription-based SaaS models are attractive.
* **Market Potential & Scalability**: How well can this scale internationally?
* **Competitive Differentiation**: Unique AI-based invoicing via WhatsApp is a key edge.

**Estimated Valuation by Year 3 (If acquired by a fintech or SaaS company)**

| **Metric** | **Year 1** | **Year 2** | **Year 3** |
| --- | --- | --- | --- |
| **Users** | 500 | 1,000 | 2,000 |
| **Revenue** | $162,000 | $324,000 | $648,000 |
| **Net Profit (60%)** | $97,200 | $194,400 | $388,800 |
| **Valuation (5-7x Revenue)** | **$810,000 - $1.1M** | **$1.6M - $2.3M** | **$3.2M - $4.5M** |

📌 **Potential Asking Price in an Acquisition:** **$3M - $5M+ in Year 3** 📌 **Companies that could acquire Invoicerly:** QuickBooks, Xero, Stripe, PayPal, FreshBooks.

**Exit Strategy Options:**

* **Sell at $3M - $5M valuation if approached by a major SaaS company.**
* **Raise venture capital at Year 2 and scale to 10,000+ users for a $10M+ exit.**
* **Remain independent and reinvest profits into expansion (multi-language, AI, integrations).**

🚀 **Invoicerly has strong acquisition potential if executed effectively!**

**Further Breakdown of Setup Costs & What You Can DIY to Save Money**

If you want to **reduce setup costs**, there are areas where you can **DIY (do it yourself)** instead of paying for development, automation, or third-party integrations. Below is a breakdown of **what costs you’d typically incur** vs. **how you can minimize expenses by handling parts yourself.**

**📍1. Core Setup Costs & Where You Can Save**

| **Component** | **Full Cost (If Outsourced)** | **\*\*DIY Cost (Savings)** | **How You Can Do It Yourself** |
| --- | --- | --- | --- |
| **WhatsApp Business API Setup** | $500 - $1,500 | ✅ **$0 - $50** | Use **Twilio/WATI/Gupshup** and configure yourself. |
| **AI Processing (ChatGPT API + OCR for text extraction)** | $2,000 - $4,000 | ❌ **Hard to DIY** | Requires coding & AI setup; better to outsource. |
| **Invoicing System (Xero/QuickBooks API or Custom Google Sheets/Email)** | $3,000 - $5,000 | ✅ **$0 - $100** | Use **Google Sheets + Email API (Zapier/Make.com)** instead of full software integration. |
| **Payment Integration (Stripe/PayPal Webhooks)** | $1,500 - $3,000 | ✅ **$0 - $100** | Use Stripe’s built-in payment links instead of API. |
| **Automation & Webhooks (Zapier/Make.com for WhatsApp → Invoice)** | $1,000 - $2,500 | ✅ **$50 - $100/month** | Set up **Zapier/Make.com** yourself to link WhatsApp to email invoicing. |
| **Hosting & Infrastructure (AWS/GCP/Azure for Data Storage & Processing)** | $1,500 - $3,000 | ✅ **$50 - $200/month** | Use **Google Drive + Google Sheets** instead of cloud hosting. |
| **Custom Domain & Landing Page Setup** | $500 - $1,500 | ✅ **$20 - $100** | Use **Carrd, Wix, or WordPress** instead of hiring a developer. |
| **Customer Support & Onboarding Automation (Chatbots, FAQ, Help Centre)** | $1,000 - $2,500 | ✅ **$0 - $50** | Use **WhatsApp auto-replies, Google Docs for FAQs, and Calendly for onboarding.** |

**📍2. Key Areas to Save by Doing It Yourself**

**1️ WhatsApp API Setup (Save $500-$1,500)**

Instead of **hiring a developer** to integrate WhatsApp with your invoicing system, you can:  
✅ **Register your business on WhatsApp Business API** (via Twilio, WATI, or Gupshup).  
✅ **Manually configure auto-replies** (e.g., “Send ‘invoice’ to start a new invoice”).  
✅ **Use Zapier or Make.com** to connect WhatsApp messages to Google Sheets.

📌 **Savings:** **Up to $1,500**

**2️ Invoice Generation (Save $3,000-$5,000)**

Instead of **paying for a developer** to build a full invoicing system, you can:  
✅ Use **Google Sheets with automated email scripts** to send invoices.  
✅ Store client details in **Google Sheets** for auto-fill invoicing.  
✅ Use **SendGrid API or Gmail for email automation.**

📌 **Savings:** **Up to $5,000**

**3️ Payment Processing (Save $1,500-$3,000)**

Instead of integrating **Stripe/PayPal APIs**, you can:  
✅ Generate **Stripe/PayPal payment links** manually and insert them in the invoice.  
✅ Use **WhatsApp auto-replies** to send payment links.

📌 **Savings:** **Up to $3,000**

**4️ Webhooks & Automations (Save $1,000-$2,500)**

Instead of paying for **custom-coded automation**, you can:  
✅ Use **Zapier** or **Make.com** to automatically send invoices when WhatsApp messages come in.  
✅ Use **Google Scripts** to automate invoice generation in Sheets.

📌 **Savings:** **Up to $2,500**

**5️ Website & Branding (Save $500-$1,500)**

Instead of hiring **a web developer**, you can:  
✅ **Use Carrd.co, Wix, or WordPress** to create a one-page website.  
✅ **Use Canva for branding/logo design** instead of hiring a designer.

📌 **Savings:** **Up to $1,500**

**📍3. Final Cost Breakdown – What You Actually Need to Pay For**

| **Component** | **Outsourced Cost** | **DIY Cost** |
| --- | --- | --- |
| **WhatsApp API Setup** | **$500 - $1,500** | ✅ **$0 - $50** |
| **Invoicing System (Google Sheets + Email API)** | **$3,000 - $5,000** | ✅ **$0 - $100** |
| **Payment Processing (Stripe/PayPal Webhooks)** | **$1,500 - $3,000** | ✅ **$0 - $100** |
| **Automation (Zapier/Make.com Integration)** | **$1,000 - $2,500** | ✅ **$50 - $100/month** |
| **Hosting & Infrastructure** | **$1,500 - $3,000** | ✅ **$50 - $200/month** |
| **Landing Page & Branding** | **$500 - $1,500** | ✅ **$20 - $100** |
| **Customer Support & Onboarding Automation** | **$1,000 - $2,500** | ✅ **$0 - $50** |

**💰 Total Estimated Cost:**

💡 **Outsourcing Everything:** **$8,000 - $15,000**  
💡 **DIY Approach:** **$100 - $500 + $50-200/month ongoing**

🚀 **Potential Savings:** **$7,500 - $14,500 upfront by DIY-ing core features.**

**📍4. What You Can DIY vs. What to Outsource**

| **Feature** | **DIY (Recommended)** | **Outsource (If Budget Allows)** |
| --- | --- | --- |
| **WhatsApp API Setup** | ✅ (Twilio, WATI, or Gupshup) | ❌ If advanced automation needed |
| **Invoice Generation** | ✅ (Google Sheets + Email API) | ❌ If full accounting integration needed |
| **Payment Processing** | ✅ (Manual Stripe/PayPal links) | ❌ If API integration needed |
| **Automation (Zapier/Make.com)** | ✅ (Basic workflows) | ❌ If advanced AI required |
| **Website & Branding** | ✅ (Use Carrd/Wix) | ❌ If you need a custom design |
| **Hosting & Infrastructure** | ✅ (Google Drive) | ❌ If you need custom cloud hosting |
| **Customer Support Chatbot** | ✅ (WhatsApp Auto-Replies) | ❌ If AI-driven chatbot needed |

**📍Final Decision – How to Proceed?**

✅ **If you want a fully automated, no-hassle system** → **Invest in professional development** (~$8,000+).  
✅ **If you’re okay with a semi-manual approach** → **DIY using Google Sheets + Zapier (~$500 upfront).**

🚀 **Would you like me to draft a DIY implementation guide to help you save costs while setting up Invoicerly?**

**Invoicerly Workflow Matrix 26/02/2025**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Stage** | **Trigger** | **Action** | **Integration** | **Estimated Time** | **Effort Rating (1-5)** |
| **1. Twilio API & WhatsApp Integration** | Create Twilio Account & Configure WhatsApp API | Set up webhook for message handling, onboarding confirmation | Twilio API, Webhooks | 3-5 hours | 3 |
|  | Define basic command structure | Handle onboarding, invoice requests, and confirmations | Twilio, AI, Xero | 3-5 hours | 4 |
| **2. Xero/PayPal Integration for Subscription Handling** | User selects subscription plan in Invoicerly | Process payment setup via PayPal/Xero API | PayPal API, Xero API | 3-5 hours | 3 |
|  | Enable automated billing | Configure webhook for subscription status updates | PayPal, Xero | 2-4 hours | 3 |
| **3. AI Setup for Invoice Extraction** | User sends invoice request via Voice/MMS/Text | Extract key details using AI (OCR, Speech-to-Text, NLP) | OpenAI Whisper, Google OCR | 3-4 hours | 4 |
|  | Confirm invoice details with user | AI asks: "Does this look correct? (Yes/No/Edit)" | AI, Twilio (WhatsApp) | 2-3 hours | 3 |
| **4. Pilot Testing** | Onboard test users | Test Twilio messages, AI invoice processing, and subscription workflow | Twilio, AI, Xero, PayPal | 3-5 hours | 4 |
|  | Verify AI accuracy | Ensure voice/text extractions process correctly | AI, Twilio | 2-3 hours | 3 |
| **5. Develop Invoicerly App Interface** | User downloads Invoicerly App or visits Web Portal | Create branding, onboarding screens, and essential UI | Glide, Bubble, or Custom App | 4-6 hours | 4 |
|  | Integrate invoice dashboard | Allow invoice tracking and management via app | Twilio, Xero, PayPal | 3-5 hours | 4 |

**Next Steps:**

1. **Start Twilio API Workflow Setup** – Ensure onboarding & invoice requests work via WhatsApp.
2. **Integrate Xero/PayPal** – Set up subscription management & invoice payments.
3. **Develop AI Extraction Model** – Fine-tune voice, MMS, and text-based invoice creation.
4. **Pilot Testing** – Run through onboarding and invoice workflows with test users.
5. **Build Invoicerly App UI** – Launch branding and app-based interactions.

**Estimated Time to Pilot:** 7-14 days with focused effort.

This ensures users experience a seamless onboarding and invoicing process, whether through WhatsApp or the app, while AI automates backend tasks. 🚀