



Finance Team Saves 50+ Hours Monthly with 360 InstantDocs Invoice Automation



Industry

Professional Services (Finance & Accounting)



Company Size

501-1,000 Employees



Region

North America & EMEA



Featured Solution

360 InstantDocs Invoice & Billing Automation

The Customer

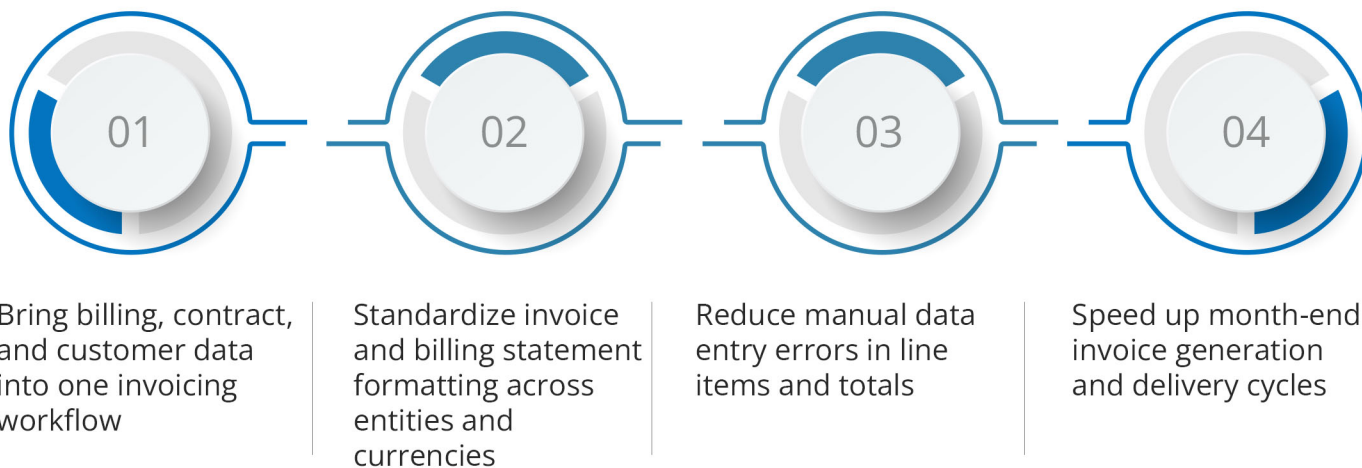
The client is a mid-market professional services firm managing client billing across consulting, managed services, and project-based engagements in North America and EMEA. With a growing multi-entity, multi-currency client base, the finance team needed a faster, more accurate way to turn Salesforce billing data into client-ready invoices and statements each month.

Problem Statement

Everest's finance team was building every invoice and billing statement by hand, exporting Account and Contract data from Salesforce, pasting it into spreadsheets and Word templates, and manually formatting line items, currencies, and payment terms. The process consumed more than 50 hours of finance team time each month, introduced frequent billing errors, and made month-end close harder to predict as the client base grew.



The Challenge



The Solution

We implemented 360 InstantDocs to automate invoice and billing document generation directly from live Salesforce billing and contract data.

- Built branded invoice, billing statement, and credit memo templates inside 360 InstantDocs
- Merged Account, Contract, and Opportunity billing fields directly from Salesforce into every template
- Used conditional logic and formatting controls to auto-apply currency, tax rules, and payment terms
- Enabled bulk generation from list views to produce entire billing runs in one click at month-end
- Auto-built itemized billing tables and subtotals, removing manual spreadsheet reconciliation
- Saved every invoice to Salesforce Files and auto-emailed billing documents directly to clients

The Outcome

Everest replaced a slow, manual invoicing process with a standardized, one-click billing workflow inside Salesforce. The finance team now generates fully formatted, on-brand invoices and billing statements in minutes instead of manually assembling them, keeping billing data accurate and month-end close on schedule.

The Impact

50%

Finance team
hours saved per
month

65%

Reduction in
average invoice
preparation time

95%

Fewer billing
and line-item
errors

3x Faster

month-end
invoice close
cycle

Contact Info

1968 S. COAST HWY 1412, LAGUNA BEACH, CA 92651

🇺🇸 +1 323 641 4417 | 🇬🇧 +44 740 327 9473 | 🇦🇺 +61 48885 3632 | 🇮🇳 +91 852 710 0131

✉ contact@360degreecloud.com

