



US-Based Professional Services Firm Reduced Invoice Turnaround with Salesforce Document Automation



Industry
Professional Services



Company Size
201-500 Employees



Region
North America



Featured Solution
InstantDocs Invoice Automation

The Customer

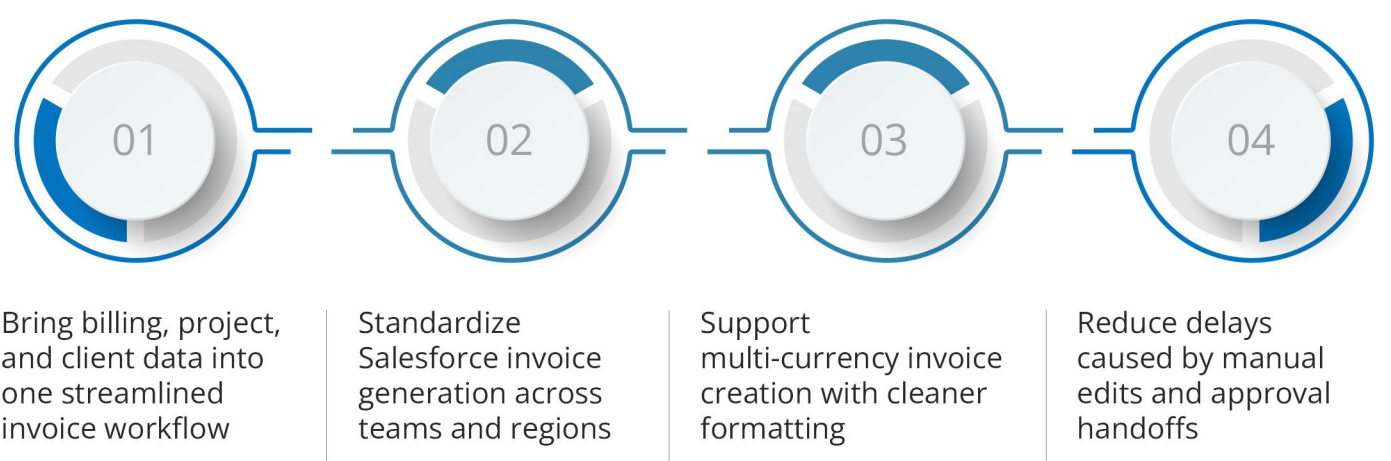
Our customer is a leading professional services firm managing project-based billing across consulting, implementation, and advisory engagements. As invoice volumes increased across clients, entities, and currencies, the firm needed a faster way to handle invoice automation in Salesforce for professional services without relying on manual document preparation.

Problem Statement

The customer’s billing team was creating invoices through a manual process that involved exported data, spreadsheet lookups, formatting edits, and repeated reviews. This slowed the invoice workflow, increased the risk of billing errors, and made multi-currency invoice creation harder to manage across growing client accounts.



The Challenge



The Solution

We implemented 360 InstantDocs to streamline billing document automation and improve Salesforce invoice generation directly from live record data.

Built branded invoice templates inside InstantDocs	Merged billing, client, and project fields from Salesforce	Used conditional logic for terms, tax, and line-item visibility
Supported multi-currency invoice creation with template rules	Enabled one-click and batch invoice generation for billing teams	Saved invoices to Salesforce Files and supported direct email delivery

The Outcome

Our customer replaced a slow, fragmented billing process with a faster and more consistent invoice workflow inside Salesforce. With InstantDocs the team could generate invoices with less manual effort, reduce formatting rework, and speed up turnaround across billing cycles while keeping invoice records connected to the right Salesforce data.

The Impact

120% billing
hours saved
per quarter

Invoices sent 3
days faster on
average

Faster billing
cycles improved
cash flow
predictability

Invoice volume
scaled by 3x
without adding
headcount

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