



## Use Case: Streamlined Project Tracking and Client Billing

### Business Scenario:

A small professional service company provides consulting services to clients. They struggle with managing project tasks, tracking billable hours, and accurately invoicing clients on time. The company uses QuickBooks Online (QBO) for financial management but lacks a seamless process to integrate project tracking and billing, leading to inefficiencies and delayed payments.

### Objectives:

- Efficiently manage project tasks and timelines.
- Accurately track billable hours for each client project.
- Automate invoice generation and ensure timely payments.
- Gain visibility into project profitability and financial health.

### Proposed Workflow:

#### 1. Project Setup:

- Trigger: A new client project is confirmed.
- Automation: Create a new project in a project management tool (e.g., Zoho Projects, Hive, or Asana). Sync the project with QuickBooks Online for billing and financial tracking.

#### 2. Task Assignment and Tracking:

- Trigger: Tasks are outlined during project planning.
- Automation: Assign tasks to team members with deadlines and priorities in the project management tool. Track progress and completion status in real-time.

#### 3. Time Tracking:

- Trigger: Team members start working on tasks.
- Automation: Use integrated time tracking tools (e.g., Zoho Projects, TSheets by QuickBooks) to log billable hours against specific project tasks. Automatically sync time entries with QBO for invoicing purposes.

#### 4. Expense Management:

- Trigger: Project-related expenses are incurred (e.g., travel, software subscriptions).
- Automation: Record expenses in QBO and tag them to the specific project. Ensure expenses are included in the project's profitability analysis.

#### 5. Invoice Generation:

- Trigger: Billable hours or milestones are completed.
- Automation: Automatically generate invoices in QBO using tracked time and project-related expenses. Send invoices to clients via email with integrated payment links.

#### 6. Payment Tracking:

- Trigger: Invoice is sent to the client.
- Automation: Monitor payment status in QBO. Send automated reminders for overdue invoices.

#### 7. Project Financial Insights:

- Trigger: Project progresses or concludes.
- Automation: Generate real-time reports in QBO to analyze project profitability. Use insights to refine pricing and resource allocation strategies for future projects.

### **Tools Involved:**

- Project Management: Zoho Projects, Asana, or Hive.
- Time Tracking: TSheets by QuickBooks, Zoho Projects, or Harvest.
- Financial Management: QuickBooks Online for invoicing, expense tracking, and reporting.
- Communication: Email platforms (e.g., Gmail or Outlook) for client correspondence.

### **Expected Benefits:**

- Efficiency: Reduce administrative overhead by 40%.
- Accuracy: Ensure all billable hours and expenses are captured, avoiding revenue leakage.
- Timeliness: Invoices are sent promptly, improving cash flow.
- Visibility: Real-time insights into project performance and profitability.

### **Future Enhancements:**

- Client Portal: Allow clients to view project progress, invoices, and payment status through a secure portal.
- Recurring Billing: Automate invoicing for retainer-based clients.
- Integrated Reporting: Use Zoho Analytics or QuickBooks Advanced Reporting for deeper insights into client profitability and team productivity.