Client XYZ

https://www.xyz.com/

“We needed a product that will solve our problem plus makes our work easier & faster. Kloudrac gave us a solution in Salesforce that fulfilled our need and also combined all our systems to just 1.”

Executive Summary

XYZ had a problem managing all the Contracts & Invoices that were to be generated from different Rate Cards & had data sources in different systems. So we proposed a system that works through Salesforce & would be able to do combine all their existing systems so that Contracts can be made, and subsequently RateCards, RateCard Slabs & Product Invoices.
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1. Hospitality Module

**Challenges**

Before XYZ took our solution, the complete Invoice Creation process was done manually in Excel Files which was pretty hectic & tiresome. It was neither easy nor everyone could use it as it wasn’t user friendly.

**Challenges faced:**

- It was very difficult for a new employee to work & manage all the data as everything was stored in multiple excel files.
- Duplicate RateCards were created as there was no system to keep a check on Contracts & their respective RateCards.
- There was no check to verify duplicity of RateCards.
- Calculations were a big problem as Effective End Dates has to be compared in Excel to Invoice Due Dates to send an email to the customer.
- Invoice History Tracking was missing in the system as all was managed in Excel Files. Invoices were created on Excel and were then uploaded on Salesforce.
- No existing feasibility to send an Immediate Invoice to the customers if required.

**No of Employees**

~ 650

**Financials**

$85 mn

**Platform(s)**

- Salesforce.com
- Force.com

**Tools and Technologies**

- Eclipse
- Salesforce
- Notepad++

**Category**

- Enterprise

**Country/Region**

- India

**Features**

- Complete Automation of Invoice.
- All the complex calculations were done by the system automatically and therefore reducing the time of the client.
- History Tracking was now possible as everything was being managed by Salesforce.
- Immediate invoice was easy now and was sent instantly and only once, with no chance of duplicity.
- Only 1 RateCard can be made active at a time, that too after approval from Finance Team.
Hospitality Process Flow

START

Account

Contract

Contact Roles

CREATE/MODIFY

RateCard & Invoice Line Item

SEND TO FINANCE TEAM FOR APPROVAL

Approved

Generate & Send Invoice

Generate Invoice

Send Invoice to Contact Role

Payment Reminder Sent every 7 days

END

Create RFC

IF CHANGES REQUIRED

FOR IMMEDIATE INVOICE
2. Travel Module

**Challenges**

Before XYZ took our solution, the complete Invoice Creation process was done manually in Excel Files which was pretty hectic & tiresome. It was neither easy nor everyone could use it as it wasn’t user friendly.

**Challenges faced:**

- Primary Challenge was to bring the data from various systems to one system which can be further used to make Product invoices at a later stage. To tackle this, we made a custom API that linked all the systems to our system.

- Calculations was not easy, it was recursive & complex and were done via Quantum.

- Their existing system had 2 systems: Static & Dynamic Version. Static was for some clients & dynamic was for other clients who wanted to change the data themselves at a later stage.

- History Tracking was missing in their existing system as everything was managed on Excel Files. They used to make excel files, then make an invoice by that excel file and then upload it to Salesforce.

- Invoice Regeneration was not easy as calculations were done again from scratch in Excel Files.

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~ 650

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- India

**Features**

- If a new user joins, it is easy for him to understand how the system works and generate invoices.

- All the complex calculations were done by the system automatically and therefore reducing the time of the client.

- History Tracking was now possible as everything was being managed by Salesforce.

- Invoice Regeneration was also easy and quick process as only a few fields have to be edited and a button is to be clicked to regenerate the invoice.
Travel Process Flow
3. Our Development Methodology (Agile)

The development methodology ensures all aspects of the program are managed leveraging specialized tools, technologies and implementation enablers. Kloudrac work closely with client to ensure the key business drivers and requirements are addressed during the program.

- **Strategy** - To defines the overall business direction and objectives of the program
- **Architecture** - Proposed architecture to be robust to meet all quality attributes of an application
- **Requirements** - Business, reporting, communication and other
- **People** - People to provide the support and information as required in the program
- **Processes** - Business processes that need to be implemented in the system
- **Initiatives** - Initiative and support for the change.
- **Programs** - Programs are defined and signed-off.

4. Why Agile?

This approach is used to bring the uniformity of program execution across all the SDLC phases in Project Perfection. Since SDLC phase initiatives are very diverse in nature it will pose challenge in managing and governing these with distinct approaches, with no uniformity on tracking the milestones. The Agile approach will ensure following:

- **Uniform Project Execution** - Ensure that the overall program plan has consistent tracking mechanism for each track by avoiding the ambiguity that will arise due to different interpretation of status coming from different track.

- **Uniform Milestones** - It is planned that milestones will be made uniform across all tracks in order to achieve intermediate states and final states with business objective in mind. For example, after the elaboration phase, project must achieve the increased visibility into processes, people, IT assets, information availability and needs, stakeholders, impacted items in form for current state so that projects do not lose the information. Commonality in reference to project approach: While crafting proposal, it was observed that multiple approaches for multiple tracks will also impact the project execution as these refer to different terminology, follow a different phased model, milestones and often the deliverables. Iterative development approach within Agile will help contain this challenge by enforcing usage of single reference to all approaches for execution.

- **Reduce Project Risks** - In an unforeseen situation, where a project is halted in the middle, it must be able to start from the end of the previous phase and not from the beginning. This will help reduce the risk of rework, loss of information and investments made.
• **Better Governance** - The uniformity and standardization achieved in this approach will help achieve better transparency and control over the progress of the program, helping governance team get the single and simplified view of the status.

5. **Implemented Scenario Screenshots:**
6. About Kloudrac Inc.

Kloudrac Inc. is a leading software product development, engineering and IT consulting company. With the decade long experience, the company helps its clients to transform in order to improve their performance and competitive positioning. Company focuses on developing latest technology solutions aimed at client’s unique business requirements and challenges in critical performance areas. The company is bequeathing services including Digital Transformation, Business Intelligence and Salesforce to assorted industries across the globe.

We serve large and growing enterprise customers from diverse industries such as BFSI, e-commerce, FMCG, retail, government, healthcare, transportation & logistics, media & entertainment, travel and telecom with our flexible blend of onsite, offsite and offshore engagement models from our global delivery centers.

Kloudrac facilitates its client with best-in-class consulting services, assisting them with technology, extendibility and feasibility.

Founded in year 2013 by four technocrats; the company is headquartered in San Francisco (US) and office located in Noida (Delhi-NCR). With numerous awards and recognitions and more than 2K enterprise customers,
Company Name employs 50+ highly talented and dedicated experts to deliver highest standards of customer satisfaction.

7. Results, Return on Investment and Future Plans

Client was surprised to see that Kloudrac was able to deliver a solution in a limited budget and time that works & made their process easy. A few other companies tried to make the same project for the client but failed to do so.

Client now has given us next stages for their RateCard System, details of which are confidential as of now.