



complexity made simple

How a German enterprise implemented automated invoicing using HubSpot and EasyBill

CASE STUDY

Industry: Marketing Tech

Client: Germany

Year: 2023-2024



As our client, a German enterprise was growing its operations, it became clear that manual invoicing was slowing it down. The company needed a more efficient system to handle various payment schedules and reduce the time spent on administrative tasks.

OPTI provided a solution by integrating HubSpot with EasyBill, automating the invoicing process and enhancing overall productivity.





CHALLENGE

The client faced several key challenges with their manual invoicing process.



The process was time-consuming, prone to errors and required substantial manual effort.



The company required a system that could easily manage different billing cycles, such as one-time, monthly, and annual payments.



HubSpot and EasyBill had to work together efficiently without additional costs.



SOLUTION

OPTI proposed an **automated workflow that connected HubSpot and EasyBill**, streamlining the entire invoicing process.

The integration ensured that data was consistently accurate and synchronized between the two platforms.

STEPS IN THE AUTOMATED INVOICE SYSTEM

- ✓ **Invoice/quote trigger in HubSpot:** Invoicing begins with predefined triggers in HubSpot, automating the creation of invoices or quotes based on specific conditions.
- ✓ **Data retrieval from HubSpot:** Key information, including client details and product pricing, is automatically retrieved from HubSpot.
- ✓ **Data transformation for EasyBill:** The retrieved data is formatted for compatibility with EasyBill.
- ✓ **Synchronization with EasyBill:** Real-time synchronization keeps both HubSpot and EasyBill updated, ensuring that no discrepancies arise.
- ✓ **This streamlined process covered every aspect of invoicing**, from the initial trigger to the final delivery.



RESULTS

Implemented in Fall 2023, the automated invoicing system quickly delivered measurable improvements.



Accuracy in data collection

The system consistently gathers the necessary information, reducing the risk of errors.



Efficient data transformation

Data transformation from HubSpot to EasyBill is smooth, ensuring that invoices are generated at once.



Simplified invoice creation

Automation has made it easier to produce professional invoices and quotes, significantly reducing manual input.



Reliable synchronization

Both systems are updated in real-time, which minimizes the risk of inconsistencies.



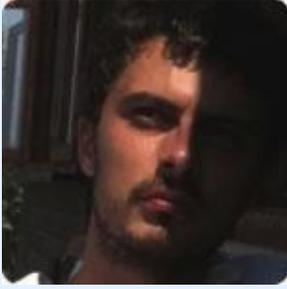
Increased efficiency

The time spent on invoicing tasks decreased by **more than 50%**, allowing staff to work on other activities.



Flexible payment management

Customers can choose from various payment schedules, all managed within the automated system.



TESTIMONIAL

"The team of specialists at OPTI helped us move UiPath's website to Hubspot and integrate various SaaS services to create a unitary experience for our customers. Well done, clear communication and management plus quick adaptation to new technologies and learning potential."

Mihai Bădiță



TECHNOLOGIES

node.js, HubSpot API, Easybill API

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✓ FormAPI, HubDB and HubL programming

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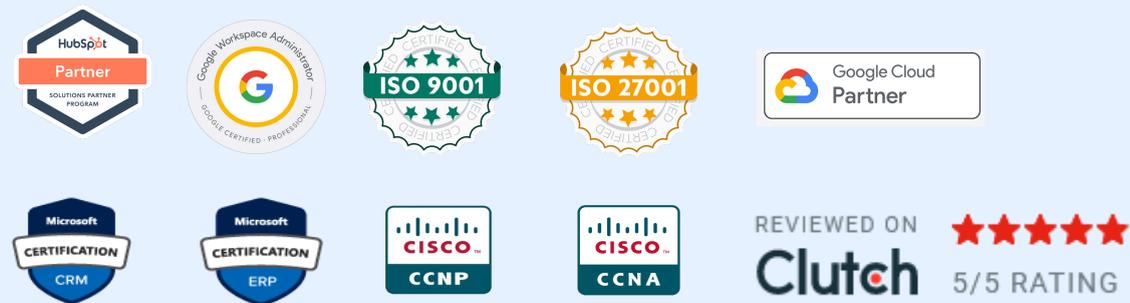
OPTI

PRODUCT DEVELOPMENT, AUTOMATION AND DATA MIGRATION

Software company developing products and cutting costs by automations and data migrations. Founded in 2005, with extensive expertise in retail, medical, publishing, and gaming industries.

The OPTI team includes senior analysts and programmers, is ISO 9001 and ISO 27001 certified, HubSpot Solution Partner, Google Cloud Partner and certified in other technological stacks.

CERTIFICATIONS



KNOW-HOW

