



Helion B2B

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INTEGRATION SUCCESS STORY

Streamlining Invoicing Process for Recurring Billing with HubSpot and e-conomic Integration: A Helion B2B Case Study

Helion B2B

The challenge

Starting on the path of automation

Helion B2B was already using HubSpot when we connected with them. Cloudify experts scheduled a call with Helion B2B team to understand their needs and the workflows that needed automation.

What did Helion B2B needed help with?

They needed help with automating their invoicing process for the clients, especially for those who were opting for their recurring billing cycles for the products that were listed on HubSpot.

The solutions

How did we approach it?

- When a deal was moved to closed or won stage in HubSpot, we created a draft invoice in e-conomic automatically.
- Helion B2B has two kinds of set up fees, i.e. one time and recurring billing type. For the listed products in HubSpot that had recurring billing, we booked invoices every month for the client who opted for them. For example, if someone subscribed for 6 months set up fees, we created 6 recurring invoices.
- The created invoices were uploaded in HubSpot, which were available in form of PDF for the clients to view.

Automations delivered - SaaS apps that helped Helion B2B grow

HubSpot – We used HubSpot for custom automation as per their business requirements.

E-conomic – The accounting app was integrated to generate invoices and automate the invoicing.

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About Helion B2B

Helion B2B offers lead generation services along with inbound marketing strategy.

Headquarters:

Copenhagen, Denmark

Industry:

Design

Complexity:

Advanced

Products and services:

Products and services: Lead generation service for SaaS, IT and manufacturing companies.

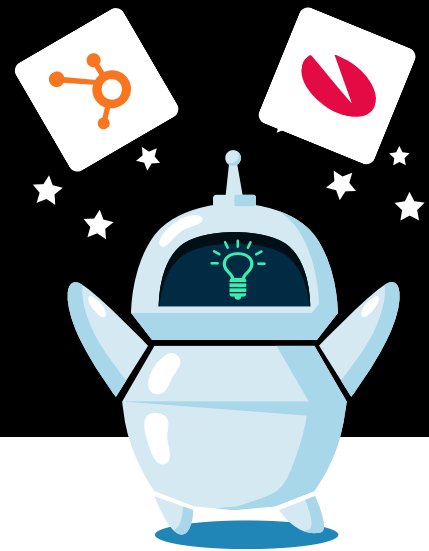
Website: <https://www.helionb2b.com/>



Hubspot + Visma e-conomic integration

Why Cloudify became the best fit for Helion B2B?

- Partnerships: Official e-conomic partner + Gold partner of HubSpot
- Automation experts: Unique team of automation experts who not only help implement apps but also integrate and make the related automation.
- Your ultimate process consultants - Cloudify helps businesses grow as a whole, manage their processes better, boost sales and increase revenue with smarter workflows and intelligent processes.
- Our offerings: Digital analysis, SaaS implementation, and Automation
- Marketplace by Cloudify: We have our own Marketplace with listed apps with predefined workflows.
- Customisations: We offer customised solutions for simple and complex business automation that best fits your business needs.
- Lighthouse by Cloudify: Your process monitoring tool and a unified platform that gives you a bird's eye view of the whole automation process.



Get a Free Consultation

Need help with business process automation? Let us take up the burden and do the flow for you.

[Book a free consultation](#)