CloudFirst Labs Makes Invoicing Error-Free

Industry: Technology

Customer Since: 2026

Products: Document Studio

Features: Document Generation

COMPANY BACKGROUND

CloudFirst Labs began as a Salesforce consulting company, helping organizations move operations and data to cloud platforms. The company expanded to become an AppExchange partner, building applications for organizations across the Salesforce ecosystem.

CloudFirst Labs has worked on transformation projects, connected business environments, user portals, Salesforce-driven processes, and easy setups for internal systems.

CLOUDFIRST LABS' CHALLENGE

Customer cases and billing data were managed inside Salesforce, so the company built a professional services automation application to unify cases, billing, and invoicing. It then needed a simple way to generate invoices from Salesforce data, with 100% accurate billing figures. CloudFirst Labs also needed to group and total invoice data by project, as well as a collaborative vendor that could support implementation and quickly address technical requirements.

TITAN'S SOLUTION

CloudFirst Labs selected Titan Document Studio for Salesforce-connected invoice generation.

Titan was implemented for click-to-generate PDFs without introducing a separate database. From a Salesforce screen, a power user launches Titan, selects a template, generates invoices, downloads the document for review, and emails it to the customer.



Titan pulls Salesforce fields into the template to produce a customer-ready invoice and gives the team greater control over document management.

KEY RESULTS

- **0 Issues Since Go-Live with Titan:** Since switching from its previous solution, CloudFirst Labs' billing document automation has operated without any reported issues. The team has found Titan's document generation for Salesforce billing easy to use, update, and maintain.

- **Customer Approved Invoices:** Customers have commented that invoices generated through Titan are clearer and easier to read than the previous format.

- **Simplified Document Management:** CloudFirst Labs can now update no-code document templates with fast deployment compared with its previous Salesforce invoicing solutions software. Its easy-to-edit Salesforce invoice templates allow users to adjust fields, reposition elements, and redeploy documents quickly.

- **Quick Setup and Low Maintenance:** Titan was cost-efficient to set up, operate, and maintain for CloudFirst Labs' automated invoice generation and Salesforce requirements.

- **Responsive Technical Support:** Titan's team quickly solved the project-based grouping and summing requirements needed for the invoice process.

- **Strong Partner Experience:** CloudFirst Labs described its experience with Titan as "night and day" compared with previous software partner relationships. As both a customer and partner, the company found Titan's team helpful, collaborative, responsive, and easy to work with.

> *"Titan was a natural selection because of ease of use and how fast we were able to build our different invoices." - John Dionne, Founder and President at CloudFirst Labs.*