



**ConvergeSol**  
Solutions Focused On Your Business

# Case Study

## TrackEase

Integrated Project, Job, Time and Invoice  
Management Solution



[www.convergesolution.com](http://www.convergesolution.com)



# ABOUT CONVERGESOL



12+

No. of Years in Business

70+

No. of Team Members

100%

Project Success Ratio

7+

Years of Avg. Relationship Tenure



Industries We Serve

Financial Services

Insurance

Real-estate

e-Commerce

Manufacturing

Healthcare

Non-profits

e-Learning

# BUSINESS PROBLEM



- The client seeks to develop a platform for efficiently overseeing numerous projects, jobs, and resources while streamlining billing and invoicing processes, aiming for a **comprehensive solution** to enhance **project management** and **financial operations**.
- The platform must provide **real-time visibility into project progress, milestones, and jobs**, allowing stakeholders to monitor project status and make informed decisions promptly.
- The client desires the capability to seamlessly transfer billing information to and from the **Relativity Platform** using API integration for **efficient data exchange and synchronization**.
- The platform should **integrate Azure Active Directory Management** for user authentication, implement role-based permission management, facilitate resource allocation, and include calendar management functionalities.
- Dealing with the **time and cost** associated with customizing and developing the platform.



# OUR SOLUTION

- ConvergeSol played a crucial role in developing a robust platform with an intuitive interface, effectively showcasing features such as **resource allocation, project and job management, time tracking, invoicing, and billing functionalities**
- The Platform includes these essential features:
  - **Jobs Management:** Allows managers to create, assign, and track jobs across different projects. It include features like job assignment, deadlines, priorities, and job dependencies.
  - **Resource Management:** Enables managers to manage and allocate resources such as human resources across various projects. This includes tracking resource availability, utilization, and conflicts.
  - **Time Tracking:** Allows users to record and track time spent on various jobs and projects. It helps in monitoring project progress, estimating project costs, and billing clients accurately.
  - **Collaboration Tools:** Facilitates communication and collaboration among team members. This may include features like discussion forums, chat, file sharing, and document collaboration.
  - **Synching with Relativity:** Smoothly transfer billing data to and from the Relativity Platform via API integration, ensuring efficient data exchange and synchronization.





## OUR SOLUTION (Cont...)

- **Budgeting and Cost Management:** Helps in creating project budgets, tracking expenses, and managing project costs. It provide insights into budget vs. actuals, and support for expense approval and reimbursement processes.
- **Reporting and Analytics:** Generates reports and analytics to provide insights into project performance, resource utilization, and budget status. This helps in making informed decisions and identifying areas for improvement.
- **Invoice Generation:** Ability to create invoices easily, either manually or automatically based on predefined billing criteria such as time entries, project milestones, or recurring billing cycles.
- **Invoice Tracking and Status Updates:** Provides visibility into the status of invoices, including sent, pending, paid, and overdue invoices. Users should be able to track payments and send reminders for overdue invoices.
- **Integration of Azure Active Directory** enables seamless user authentication and access management, enhancing security and simplifying user administration within the system.
- **Role-based permission feature** assigns access rights based on predefined roles, ensuring users have appropriate permissions to perform tasks, enhancing security and data integrity.





# BUSINESS BENEFITS

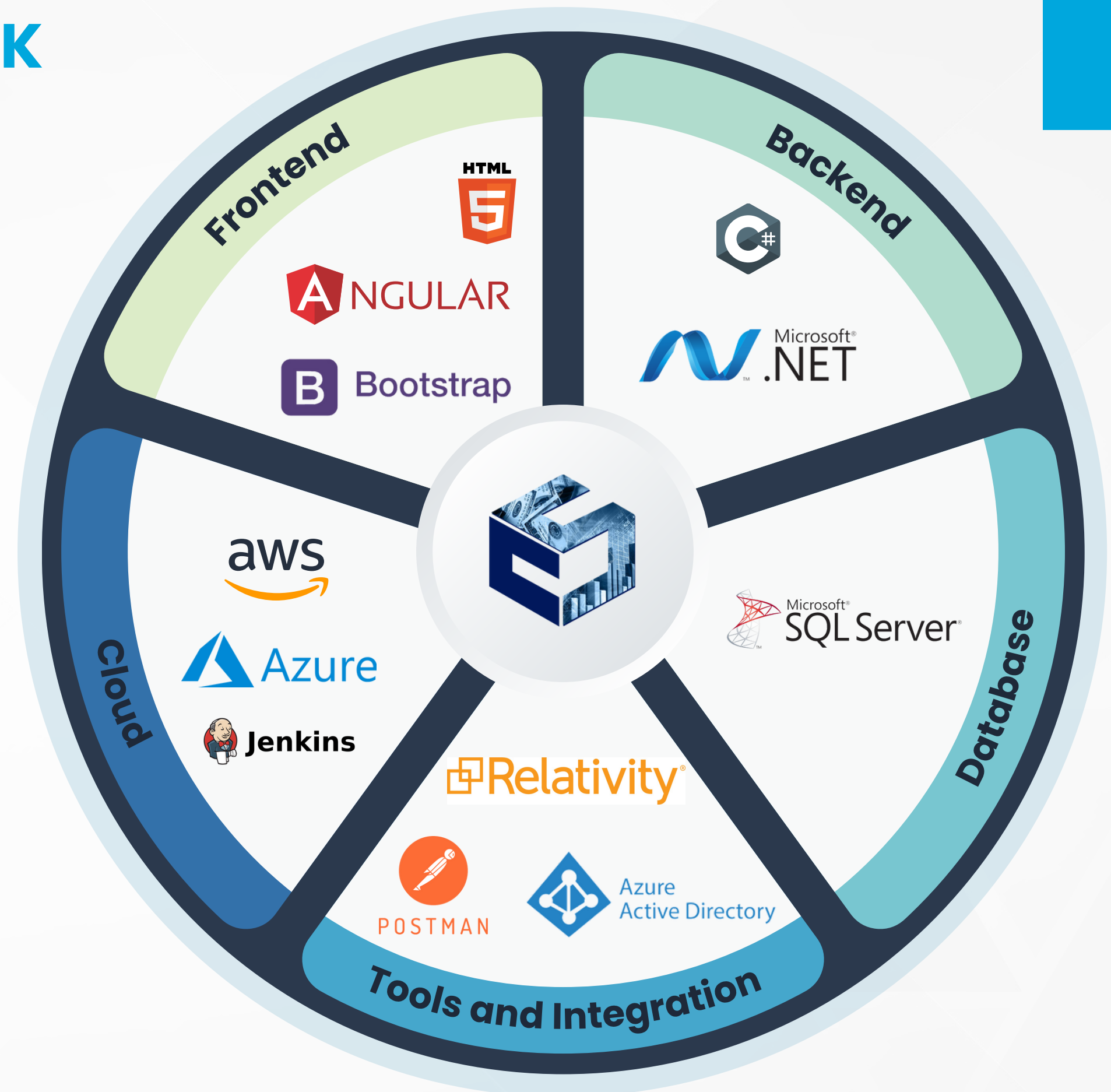
- The platform **improved organization efficiency, and coordination**, leading to better project completion, resource utilization, and overall profitability.
- The platform enabled efficient allocation and utilization of resources, including human resources, time, and budget, resulting in optimized resource allocation, **increased productivity and reduced waste**.
- Provided real-time visibility into project progress, milestones, and tasks, allowing stakeholders to **monitor project status and make informed decisions promptly**.
- **Automating invoice creation** minimizes errors, ensures accurate billing, and frees up staff to concentrate on other tasks, **enhancing productivity**.
- **Synching with Relativity** for invoice aids businesses in monitoring payments and effectively managing cash flow. Additionally, it enables prompt follow-up on overdue invoices to address payment issues promptly.
- Our expertise in facilitating platform scalability and disciplined release management led the client to acknowledge us as a **trusted and capable partner**.
- Our successful partnership fulfilled immediate needs and laid a solid foundation for the client platform's **long-term growth and development**.



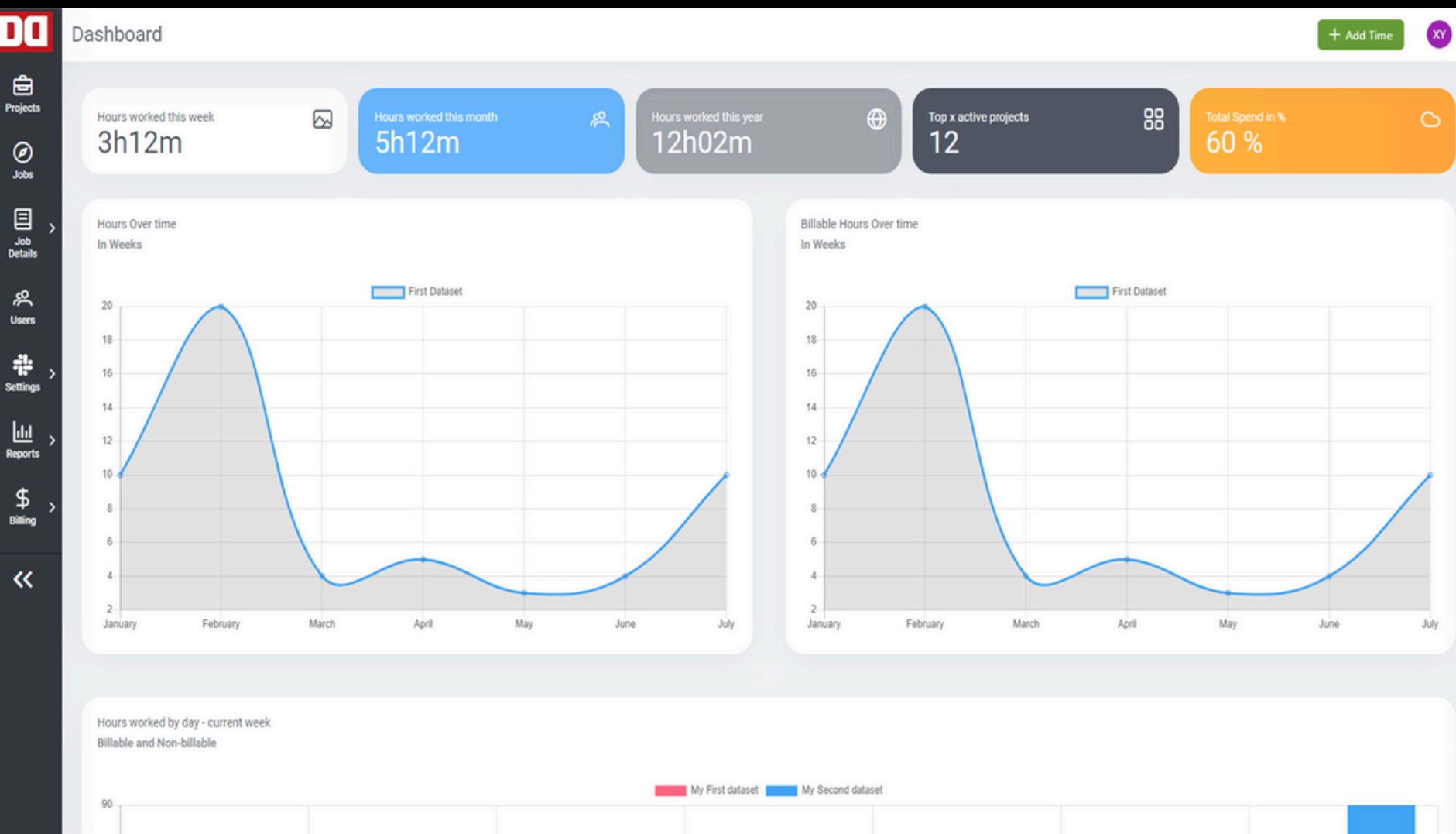


# PROJECT TECHNOLOGY STACK

- Selecting the right technology stack for a project is a critical decision that can significantly impact the project's success.
- We have taken several factors into account while making our technology stack selection for project implementation:
  - Scalability
  - Performance
  - Security
  - Cost
  - Third-party Integrations
  - Time-to-Market







# SAMPLE PROJECT SCREENSHOTS

Take a Look







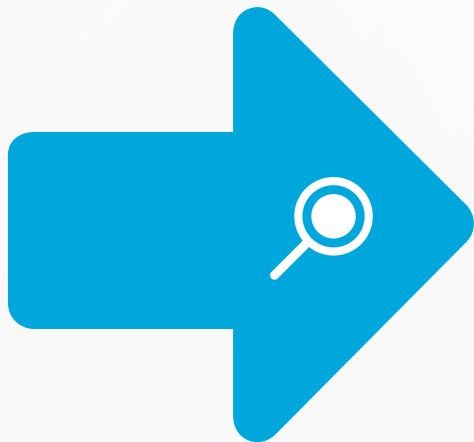
# OUR DEVELOPMENT PROCESS

The Software Development Life Cycle (SDLC) is a well-established framework utilized in project management.

It encompasses the various stages involved in the development of an information system, starting from the initial feasibility study and extending to the maintenance of the completed application.

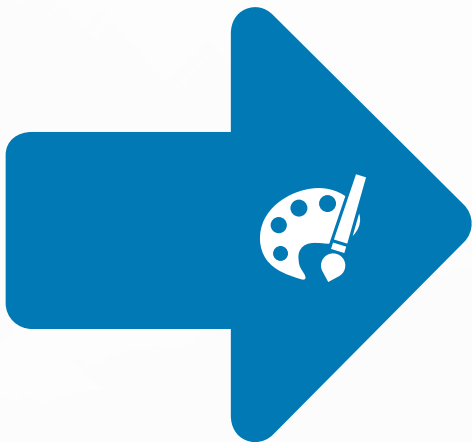
## DISCOVERY

- In Depth Analysis
- Understanding Your Business
- Feasibility of Project



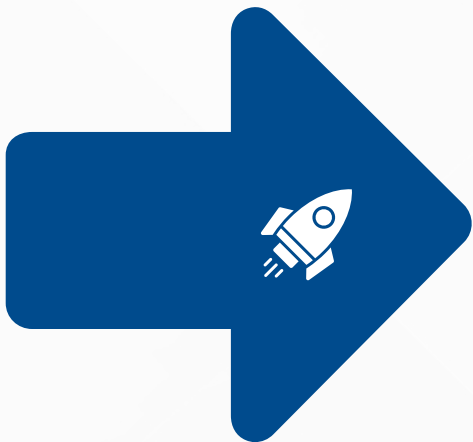
## DESIGN

- Wireframe
- Web/Mobile
- Application Visuals
- Application Workflow



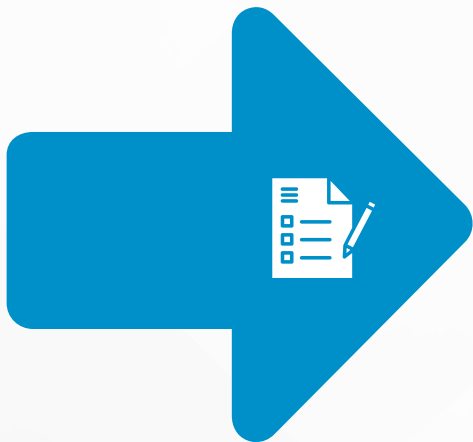
## UAT & LAUNCH

- User Acceptance
- Testing
- Launch



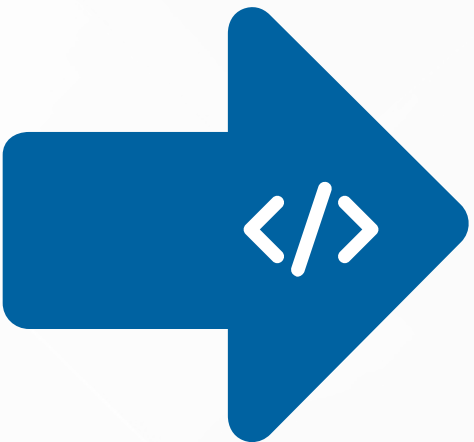
## PROJECT SPECIFICATION

- Requirement Understanding
- Finalize Scope
- Estimation
- Development Technologies



## DEVELOPMENT & TESTING

- Project Planning
- Code Implementation
- Integration with 3rd Party
- Manual Testing
- Bug Fixing



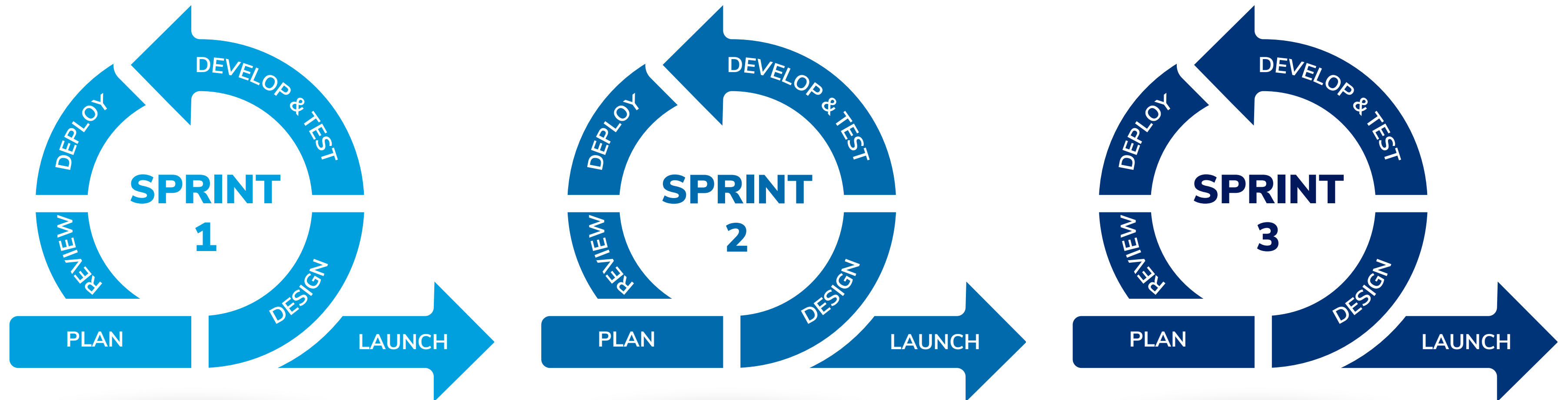
## ONGOING SUPPORT

- New Features
- Version Updates
- Server Management
- Backup





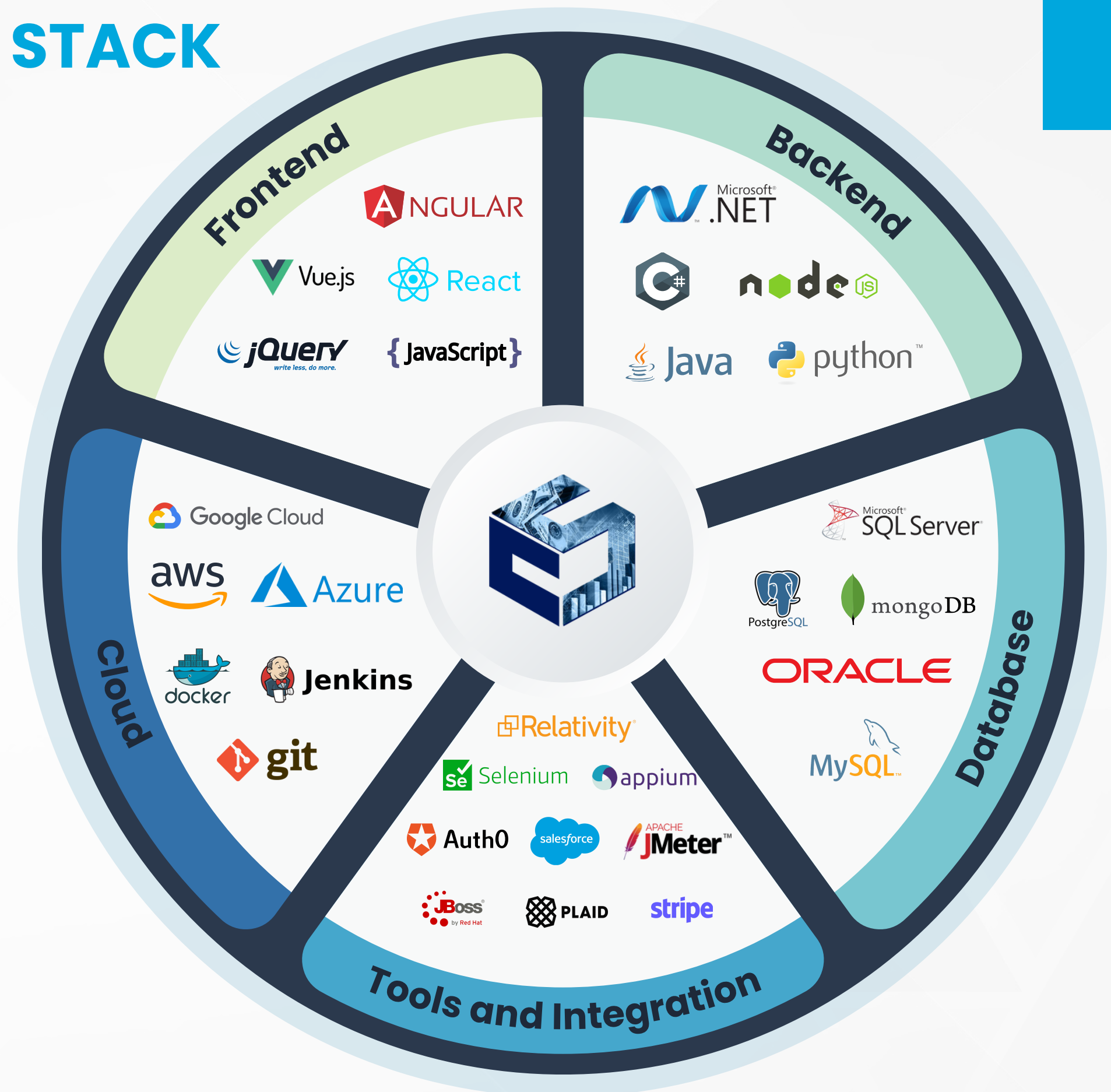
# OUR AGILE DEVELOPMENT **PROCESS**



Agile methodology is a project management framework that prioritizes adaptability, collaboration, and iterative development. It emphasizes delivering value to customers through frequent releases, continuous feedback, and self-organizing teams. Agile promotes flexibility, transparency, and the ability to respond quickly to changes in requirements or market conditions.

# CONVERGESOL TECHNOLOGY STACK

- At ConvergeSol, we leverage a cutting-edge technology stack to deliver innovative solutions that meet the unique needs of our clients.
- Our partnerships with leading software providers like Microsoft, Salesforce, Amazon, and Relativity allow us to create best-in-class solutions that solve real business problems.
- Here's a glimpse into our key technology experience across the entire software development lifecycle:
  - Frontend technologies
  - Backend technologies
  - Infrastructure and DevOps
  - Tools & Integrations







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# EMBARK ON YOUR JOURNEY WITH US

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