



APEXVIRTUE

Apexvirtue

Apexvirtue : Automation Solutions Portfolio



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4. Finance & Payment Tracking Automation



CLIENT CHALLENGE

A mid-sized business struggled with manual finance tracking:

- Payment records were scattered across spreadsheets.
- No clear system to track who paid vs. who didn't.
- Follow-ups for unpaid invoices were delayed or missed.
- Finance and operations teams lacked visibility on payment status.

This caused cash flow delays, inefficiency, and unnecessary stress for the finance team.



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OUR SOLUTION

We designed an intelligent lead automation workflow that captures, qualifies, and nurtures leads instantly:



Every new transaction is instantly captured from the payment gateway.



Raw payment data is cleaned and standardized for consistency.



Smart Finance Tracking (Google Sheets + Airtable) System automatically checks if the payment exists.



Finance Database updates paid transactions, Unpaid transactions



Automatically creates a task for the finance/operation s team to follow up on unpaid invoices.



sending monthly and weekly inance reports and revenue automatically





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Outcome

✓ 100% visibility on payments — paid vs. unpaid clearly tracked in real time.

✓ No more missed follow-ups — ClickUp tasks ensure the team acts immediately.

✓ Hours of manual reconciliation saved weekly.

✓ Healthier cash flow with timely collections.

Centralized finance database in Airtable, accessible anytime.





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Workflow (Visual)

