LINKTRADE

How LinkTrade runs its back office from a WhatsApp chat

LinkTrade is a Singapore packaging supplier. Its team used to prepare every invoice by hand in Excel and keep prices, delivery orders and supplier receipts up to date in separate places. Now they send the details in a WhatsApp chat, and chatavocado updates their records and handles the paperwork that follows.

30–40 min
to prepare one invoice before

< 1 min
to prepare one invoice now

~90%
less invoice work, by the team's estimate

How it worked before

Each order started in an Excel template. Someone looked up the customer and their prices, typed in the items and generated the invoice. Delivery orders, signed copies and supplier receipts were handled by hand too, and the team then updated their Google Sheet and QuickBooks, their accounting software, separately.

- One invoice took 30 to 40 minutes from start to finish.
- Prices were typed in by hand, and pricing mistakes happened.
- Each new customer and each extra order meant more admin, so the work grew with the business.

> **“We were actually using Excel... plug it in and then generate the invoice.”**
>
> LinkTrade finance team

What LinkTrade wanted

To keep using Google Drive, their Google Sheet and QuickBooks, and stop typing the same details into each of them. Their customers, products, prices, invoices and expenses are now kept as records in chatavocado, and those tools are updated from there.

HOW IT WORKS NOW

What the team sends, and what happens next

Every job ends with a summary. Nothing is saved until someone on the team replies yes.

1. A new order

CFA1, delivery on 14th October:
A100 - 1 carton
A200 - 2 cartons
09:41

• Customer: **Café A** (CFA1)
• Invoice date: 14 Oct · Terms: 30 Days
• A100 Pouch, small · 1 ctn
• A200 Pouch, large · 2 ctn
Reply **yes** to create the invoice, or tell me what to change.
09:41

Confirm
09:42

Invoice created for **Café A**.
Subtotal S$322.00 · GST 9% S$28.98 · **Total S$350.98**
09:42

Then the invoice and delivery order PDFs arrive in the chat, a copy goes to Google Drive, and the invoice is added to the Google Sheet and QuickBooks.

2. A change to an invoice

Edit INV-00123, add one carton of B300
11:05

Invoice **INV-00123** (CFA1)
• B300: new line, 1 ctn
Totals and both PDFs are updated when it's saved.
Reply **yes** to save, or tell me what to change.
11:05

Yes
11:06

Invoice **INV-00123** updated.
• B300 new line: 1 ctn = S$85.00
Total S$443.63
11:06

Then the new PDFs arrive in the chat within a minute, and the Google Sheet updates too.

3. A signed delivery order

[Photo of the signed delivery order]
16:20

DO **DO-00118** · invoice **INV-00118** · **Café B**
Saving this emails the signed DO with the invoice to Café B's accounts address and saves it to Drive.
Reply **yes** to save it.
16:20

Confirm
16:21

Saved the signed DO to invoice INV-00118. The email to the customer and the Drive copy go out next.
16:21

Then the customer gets the signed delivery order and the invoice by email, and the invoice shows when it was sent.

4. A supplier receipt

[Photo of a supplier receipt]
Paid by me, full payment, account 4
14:02

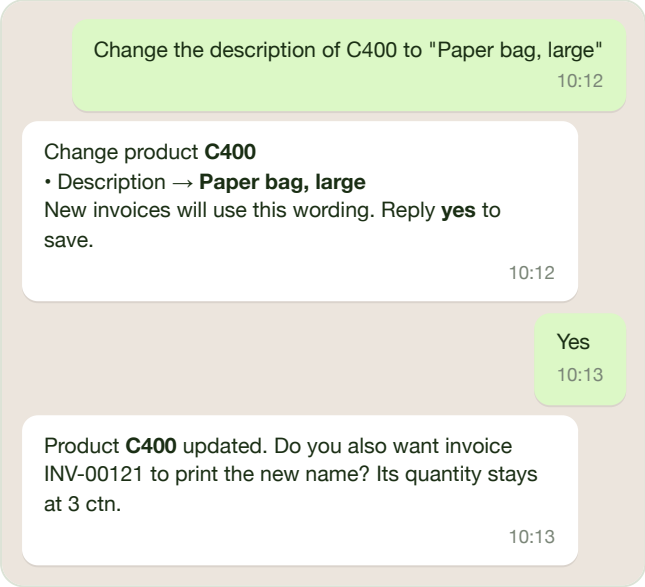
• Supplier: **Supplier C**
• Amount: RMB 3,200.00, no GST
• Posts to QuickBooks as: S$611.20
• Account: Cost of sales, packaging
Reply **yes** to post this to QuickBooks, or tell me what to change.
14:02

Yes
14:03

Expense saved and sent to QuickBooks. It will show as Posted or Not posted in a moment.
14:03

Then the expense is in QuickBooks under the account the team picked.

5. A product name change



Then new invoices use the new name, and older ones can be updated in the same chat.

The checks behind each job

- Only the team's approved WhatsApp numbers can use it.
- An order line with no price for that customer isn't saved, and a similar product is never swapped in.
- A signed delivery order has to match its invoice number, customer and printed date before the customer is emailed.
- The team picks the expense account, and duplicate receipts are caught before anything is posted.
- Customers, products and prices can't be deleted from the chat.
- It only says an invoice is saved, emailed or in QuickBooks when the record shows it.

The result

LinkTrade says preparing an invoice went from 30 to 40 minutes to under a minute, and estimates about 90% less invoice work. The team handles orders, changes, signed delivery orders and supplier receipts from the same chat, and their Google Sheet and QuickBooks are updated from the records.

> **“What took 30 to 40 minutes now takes under a minute.”**
>
> LinkTrade finance team

Still doing admin work by hand?

Bring a recent invoice, a supplier receipt or anything else your team types up by hand to a demo. We'll go through which steps chatavocado could take on for your team, and which ones someone should still check.

Book a demo at chatavocado.ai