

POWER LINE SERVICES, KSA



Case Study

Overview

Power Line Services faced challenges in managing financial operations, tracking project-related expenses, and synchronizing data across departments. With the implementation of **Zoho Books**, the organization achieved improved accuracy, operational transparency, and automated workflows.

Key takeaways:

- Centralized financial operations and reporting
- Enhanced accuracy in invoicing and expense tracking
- Improved visibility into project-based financials
- Automated workflows that reduced manual workload

Executive Summary

"At Power Line Services, ensuring peak performance of critical power infrastructure is our mission. Our work requires precision, reliability, and seamless operational control across all departments, including finance."

Power Line Services, operating across multiple regions, specializes in load bank rental solutions, engineering services, commissioning, and operational support.

Location: GCC Region

Industry: Engineering Services & Power Infrastructure Solutions

Employees: 20–50

Core Services: Load bank rentals, generator & UPS testing, commissioning services, and turnkey engineering support.

Problem Statement and Key Challenges

Power Line Services managed its finances with conventional tools and partially manual processes, resulting in inefficiencies and operational bottlenecks.

- Lack of centralized financial oversight
- Manual invoicing led to delays and errors
- Difficulty in tracking project-based expenses and revenues
- Limited visibility of real-time financial performance
- Inefficient approval workflows

"Our finance and project teams were spending too much time reconciling data manually. We needed a system that could support our technical operations with equal precision in finance." – ***Finance Manager, Power Line Services***

Evaluation of the Problem

The **Al Fahad IT Consulting** team conducted a detailed assessment of Power Line's workflows, existing pain points, and operational requirements. Through structured discovery sessions, we identified gaps in invoicing, expense management, inventory coordination, and financial reporting.

Our experts mapped out the end-to-end financial processes and evaluated integration points to ensure a smooth transition into **Zoho Books**.

Proposed Solution

To address these challenges, **Zoho Books** was proposed as the ideal solution due to its:

- Robust project-based accounting features
- Automated invoicing and recurring billing capability
- Streamlined expense tracking and approval workflows
- Customizable financial reporting tools
- Seamless integration with Zoho Inventory (optional expansion)

Key Features Leveraged:

- Project-based invoicing
- Automated workflows for approvals
- Custom templates for quotes and invoices
- Expense categorization and tracking
- Real-time dashboards and reporting

These features directly addressed Power Line's need for accuracy, scalability, and real-time financial visibility.

Implementation

The implementation was completed within **3 weeks**, including:

- System configuration tailored to project-based workflows
- Data migration from prior financial records
- Customization of invoice and estimate templates
- Workflow automation setups
- Team training sessions for finance and operations teams

Workarounds Delivered:

In scenarios where highly customized features were required, Al Fahad IT delivered efficient workarounds ensuring uninterrupted operations.

- The implementation faced no major deviations, and all challenges were mitigated proactively through continuous coordination.

Result

After implementing Zoho Books, Power Line Services experienced significant operational improvements:

Key Outcomes:

- **40% reduction** in manual financial processing
- **100% accuracy** in project-based invoicing
- **Real-time reporting** enabled better decision-making
- **Faster approval cycles** through automated workflows
- **Improved collaboration** between finance and operations

"Zoho Books has transformed the way we manage our financial operations. The system is fast, accurate, and has given us complete confidence in our numbers." – *Operations Director, Power Line Services*

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Zoho Authorized Partner – GCC Region

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☎ *Available on request*

Let's help you transform your business with Zoho. Schedule a consultation today!