ACCOUNTING & FINANCE OPERATIONS

LedgerPilot

Turn daily accounting into a clear, controlled operating rhythm

Bring quotations, invoices, payments, credit notes, tax readiness and reconciliation into one practical finance cockpit.

The value for your team

01

Quote-to-cash control

Keep commercial documents and payment follow-through connected.

02

Finance readiness

See tax, reconciliation and account actions that need attention.

03

Trusted oversight

Give decision-makers a cleaner view of daily financial operations.

Product overview

LedgerPilot keeps financial work visible from quote to cash, gives teams a cleaner view of what needs attention and preserves approvals and accountability as the operation grows.

LedgerPilot is designed for growing service businesses that need dependable finance operations without a heavyweight ERP. It connects quotations and approvals, payments and credit notes and role-based finance oversight so teams can move from input to accountable action without losing the decision trail.

The product supports the operating workflow; it does not remove professional judgement, statutory responsibility or customer ownership. Final controls, integrations and commercial scope are confirmed during discovery and recorded in the implementation plan.

Customer challenges it addresses

01 Information about quotations and approvals, invoice lifecycle management and payments and credit notes often lives in separate tools, inboxes or spreadsheets, making the operating picture difficult to trust.

02 When teams need to move delivered work into billing, manual hand-offs can hide ownership, delay decisions and make exceptions harder to resolve.

03 Leaders need a clearer way to achieve trusted oversight while preserving human approval, role boundaries and an understandable record of what happened.

Value created in practice

Quote-to-cash control

Keep commercial documents and payment follow-through connected.

Finance readiness

See tax, reconciliation and account actions that need attention.

Trusted oversight

Give decision-makers a cleaner view of daily financial operations.

Detailed capabilities

Six connected capabilities shape the core LedgerPilot operating experience.

01 Quotations and approvals

Create, review and progress commercial quotes with clear status, ownership and approval points before work moves forward.

02 Invoice lifecycle management

Keep billing records connected to the customer and delivered work, with visible lifecycle status from preparation through settlement.

03 Payments and credit notes

Record payment and adjustment activity in the same operating context so finance teams can follow what changed and why.

04 Recurring billing

Support repeatable billing cycles while keeping schedule, ownership and exceptions visible to authorised finance users.

05 Bank reconciliation and tax readiness

Bring matching, exception review and tax-readiness actions into a controlled queue rather than relying on disconnected month-end files.

06 Role-based finance oversight

Bring role-based finance oversight into the shared LedgerPilot workflow with visible ownership, status and accountable review points.

Connected operating model

The capabilities are designed to work together. Quotations and approvals establishes context, payments and credit notes moves the work forward, and role-based finance oversight supports review and accountability.

How teams use the product

The workflow is intentionally simple to understand, while retaining visible owners, review points and evidence.

01

Create and approve the commercial record

Authorised users combine quotations and approvals and invoice lifecycle management to create and approve the commercial record. The workflow keeps the responsible owner, review point and resulting action visible.

02

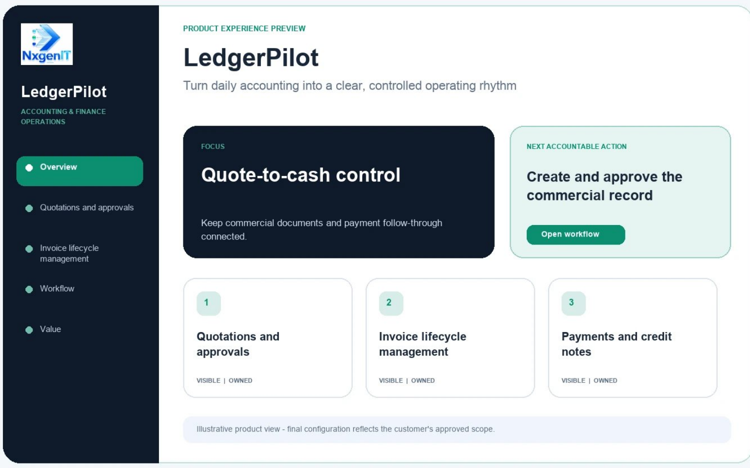
Move delivered work into billing

Authorised users combine payments and credit notes and recurring billing to move delivered work into billing. The workflow keeps the responsible owner, review point and resulting action visible.

03

Reconcile payment and close the finance loop

Authorised users combine bank reconciliation and tax readiness and role-based finance oversight to reconcile payment and close the finance loop. The workflow keeps the responsible owner, review point and resulting action visible.



Illustrative product preview. Final screens and configuration reflect the customer's approved scope.

Rollout, governance and success

A controlled rollout keeps the product aligned to customer ownership, real operating roles and measurable outcomes.

PHASE 01

Discover and scope

Confirm the users, operating boundaries, source data and decisions that LedgerPilot must support.

PHASE 02

Configure roles and controls

Define authorised roles, approval points, protected information and escalation paths before customer data is introduced.

PHASE 03

Prepare data and connections

Map the required inputs for quotations and approvals and invoice lifecycle management, including migration or integration needs.

PHASE 04

Pilot, validate and scale

Run a controlled pilot, review outcomes with responsible users, adjust the workflow and expand only after acceptance.

Roles, ownership and control

LedgerPilot is configured around named users, authorised roles and explicit approval points. Customer data remains customer-owned, protected information is limited to appropriate roles, and important actions retain an understandable history.

What success can look like

- Shorter cycle time across 'Create and approve the commercial record'.
- Fewer unresolved exceptions around payments and credit notes.
- Clearer ownership of approvals, follow-ups and closure evidence.
- Stronger adoption among the intended users and responsible reviewers.

Best for

Growing service businesses that need dependable finance operations without a heavyweight ERP.

See how this product fits your operation

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