

Invoice generation and payment processing

Automatically generates invoices from completed job data and processes payments through integrated systems, reducing billing delays and improving cash flow for concrete contractors.

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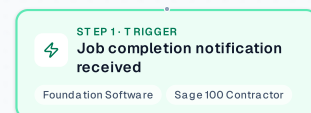


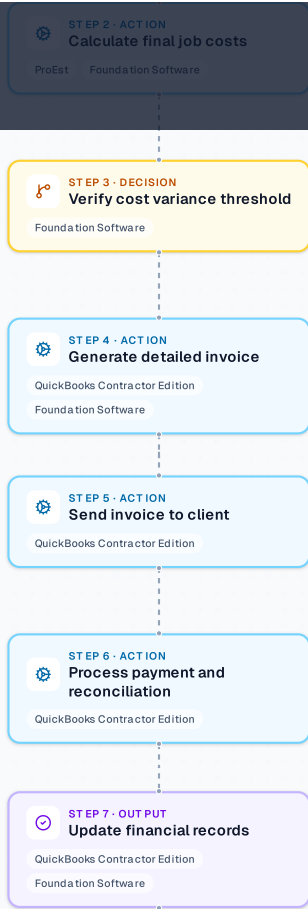
WORKFLOW TRIGGER

Project manager marks concrete job as completed in project management system

Visual Flow

Each node represents an automated step. Connections show how data and decisions move through the workflow.





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Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

⚡ TRIGGER

Job completion notification received

The workflow initiates when a concrete job is marked as completed with all materials, labor hours, and equipment usage recorded. Project completion data is automatically pulled from the management system.

2

 ACTION

Calculate final job costs

System automatically compiles all project expenses including concrete materials, labor hours, equipment rental, and any change orders. Final cost calculations are validated against original estimates.

ProEst

Foundation Software

3

 DECISION

Verify cost variance threshold

Checks if final costs exceed predetermined variance threshold from original estimate. Jobs with high variance are flagged for manual review before invoice generation.

Foundation Software

4

 ACTION

Generate detailed invoice

Creates professional invoice with itemized concrete work, materials used, labor breakdown, and any applicable sales tax. Invoice includes progress photos and completion certificates.

QuickBooks Contractor Edition

Foundation Software

5

 ACTION

Send invoice to client

Automatically emails invoice to client with payment portal link and accepts multiple payment methods including ACH, credit cards, and checks. Payment terms and due dates are clearly specified.

QuickBooks Contractor Edition

6

 ACTION

Process payment and reconciliation

Automatically processes received payments, updates accounts receivable, and reconciles bank deposits. Sends payment confirmations to both client and internal accounting.

QuickBooks Contractor Edition

7

 OUTPUT

Update financial records

Final step updates all financial records, profit margins for the job, and generates reports for management review. Completed transaction data feeds into business analytics dashboards.

QuickBooks Contractor Edition

Foundation Software



Outputs

- Professional invoice with detailed breakdown

AI Business OS

- Payment confirmation and receipt
- Updated accounts receivable records
- Job profitability report



Key Metrics

- Average time from job completion to invoice sent
- Invoice payment collection rate
- Days sales outstanding (DSO)



Tools & Integrations

- Foundation Software
- Sage 100 Contractor
- ProEst
- QuickBooks Contractor Edition

AI Business OS

Actionable AI implementation strategies for business leaders ready to transform their operations.

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