

Invoice generation and billing

Automatically generates invoices and processes billing for completed deliveries by collecting delivery data, calculating costs, and sending invoices to customers. This workflow reduces manual billing errors and accelerates payment collection.

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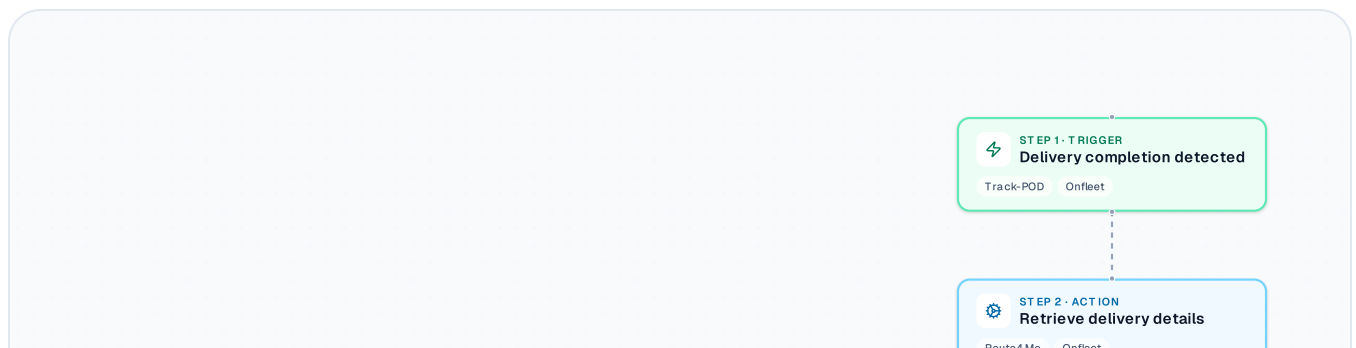


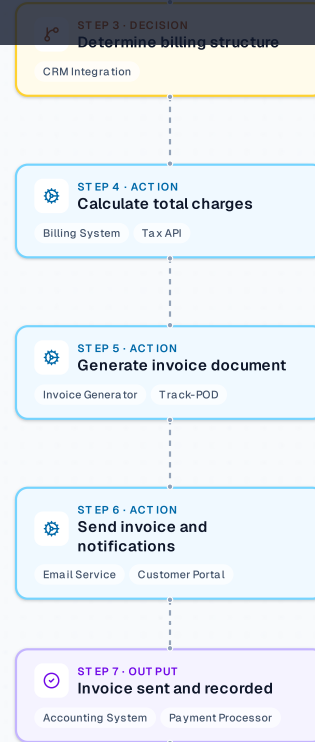
WORKFLOW TRIGGER

Delivery is marked as completed in the tracking system

Visual Flow

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





Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

Delivery completion detected

The workflow is triggered when a delivery status changes to 'completed' in the tracking system. This includes proof of delivery confirmation from the driver.

Track-POD

Onfleet

2

 ACTION

Retrieve delivery details

Fetches comprehensive delivery information including route data, time stamps, distance traveled, and any additional services provided. Special handling fees and fuel surcharges are also collected.

Route4Me

Onfleet

3

 DECISION

Determine billing structure

Evaluates whether the customer uses flat-rate pricing, distance-based pricing, or custom enterprise rates. Routes to appropriate calculation method based on customer tier and service level.

CRM Integration

4

 ACTION

Calculate total charges

Computes final billing amount including base delivery fee, distance charges, time-based fees, and any applicable surcharges or discounts. Tax calculations are applied based on delivery zones.

5

 ACTION

Generate invoice document

Creates a detailed invoice with itemized charges, delivery proof, route map, and payment terms. Invoice is formatted according to customer preferences and compliance requirements.

Invoice Generator

Track-POD

6

 ACTION

Send invoice and notifications

Delivers invoice to customer via their preferred method (email, portal, API) and sends delivery confirmation notifications. Payment reminders are scheduled based on terms.

Email Service

Customer Portal

7

 OUT PUT

Invoice sent and recorded

Invoice is successfully delivered to customer and logged in accounting system with tracking number for follow-up. Payment status monitoring begins automatically.

Accounting System

Payment Processor



Outputs

- Generated invoice with delivery proof
- Customer billing notification
- Accounting system entry
- Payment tracking record



Key Metrics

- Invoice processing time
- Billing accuracy rate
- Days sales outstanding
- Customer payment response time



Tools & Integrations

- Track-POD
- Onfleet
- Route4Me
- CRM Integration
- Billing System
- Tax API
- Invoice Generator

- Email Service

AI Business OS

Customer Portal

- Accounting System
- Payment Processor



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