

Invoice generation and billing

Automates invoice generation and billing for completed electrical work, from job completion to payment processing, reducing manual data entry and accelerating cash flow.

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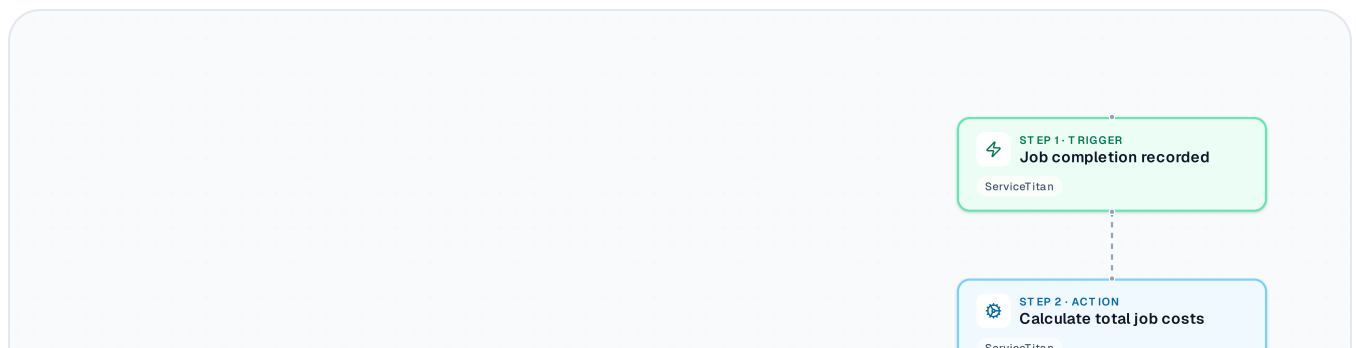


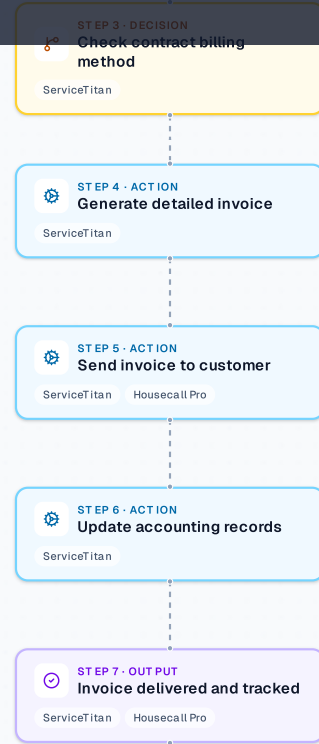
WORKFLOW TRIGGER

Electrical job is marked as completed in the field management 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

Job completion recorded

Field technician marks electrical job as completed in ServiceTitan with final hours, materials used, and photos. This triggers the automated invoice generation workflow.

ServiceTitan

2

 ACTION

Calculate total job costs

System automatically pulls labor hours, material costs, permit fees, and any change orders to calculate the final invoice amount. Applies appropriate tax rates and markup percentages.

ServiceTitan

3

 DECISION

Check contract billing method

Determines if this is a fixed-price contract job, time-and-materials billing, or requires customer approval for overages. Routes to appropriate invoice template and approval process.

ServiceTitan

4

 ACTION

Generate detailed invoice

Creates professional invoice with line items for labor, materials, permits, and photos of completed work. Includes payment terms and method options for the customer.

5

 ACTION

Send invoice to customer

Automatically emails invoice to customer with online payment portal link and SMS notification. Sets up automatic follow-up reminders for unpaid invoices.

ServiceTitan

Housecall Pro

6

 ACTION

Update accounting records

Syncs invoice data to accounting system and updates job profitability tracking. Creates accounts receivable entry and schedules payment monitoring.

ServiceTitan

7

 OUTPUT

Invoice delivered and tracked

Customer receives professional invoice with multiple payment options and automated follow-up sequence begins. Invoice appears in accounts receivable dashboard for tracking.

ServiceTitan

Housecall Pro



Outputs

- Professional invoice with line-item details and photos
- Customer payment portal link
- Accounts receivable entry
- Automated payment reminder sequence



Key Metrics

- Average time from job completion to invoice sent
- Invoice-to-payment cycle time
- Invoice accuracy rate
- Customer payment portal adoption rate



Tools & Integrations

- ServiceTitan
- Housecall Pro

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