

# Invoicing and payment collection

Automatically generates and sends invoices when field work is completed, processes payments, and handles follow-up for unpaid invoices to reduce collection time and improve cash flow.

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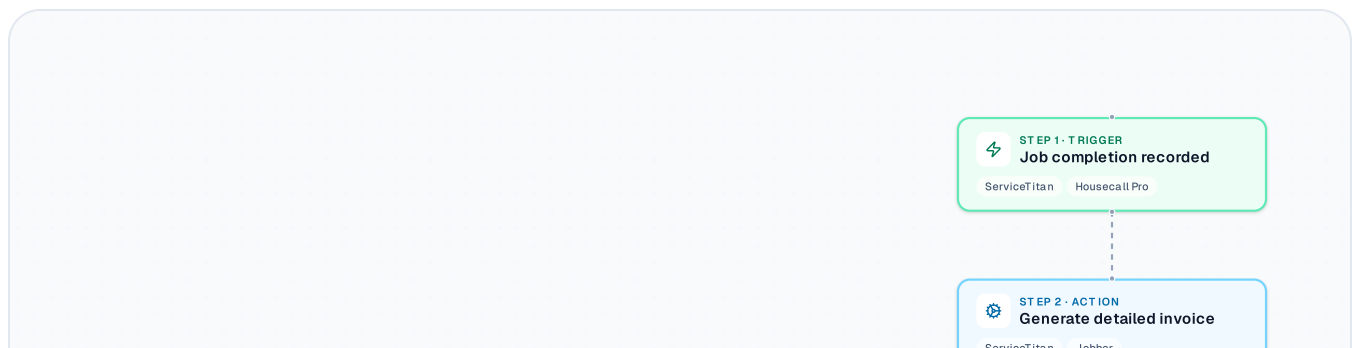


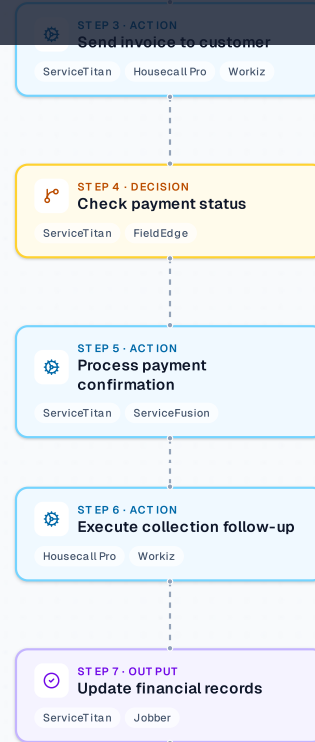
## WORKFLOW TRIGGER

Technician marks job as completed in field service 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

Technician updates job status to completed with parts used, labor hours, and customer approval in the field app. This triggers the automated invoicing process.

ServiceTitan

Housecall Pro

2

 ACTION

## Generate detailed invoice

System automatically calculates total costs including parts markup, labor rates, taxes, and any applicable discounts. Invoice is formatted with company branding and itemized breakdown.

ServiceTitan

Jobber

3

 ACTION

## Send invoice to customer

Invoice is automatically emailed and/or texted to customer with multiple payment options including credit card, ACH, and payment plan links. Customer receives immediate notification.

ServiceTitan

Housecall Pro

Workiz

4

 DECISION

## Check payment status

System monitors for payment receipt within predefined timeframe (typically 24-48 hours). Branches workflow based on whether payment was received or not.

5

 ACTION

### Process payment confirmation

For paid invoices, system automatically records payment, updates customer account, and sends receipt. For unpaid invoices, initiates follow-up sequence.

ServiceTitan

ServiceFusion

6

 ACTION

### Execute collection follow-up

Sends automated reminder messages via email and SMS for overdue invoices. Escalates to personal outreach queue after multiple failed attempts.

Housecall Pro

Workiz

7

 OUTPUT

### Update financial records

Final step records all transaction details, updates accounts receivable, and generates reports for accounting reconciliation. Customer payment history is updated for future reference.

ServiceTitan

Jobber



## Outputs

- Automated invoice delivery within 15 minutes of job completion
- Payment processing confirmation and receipts
- Overdue invoice follow-up queue for manual review



## Key Metrics

- Average invoice-to-payment time
- First-attempt payment success rate
- Outstanding accounts receivable aging



## Tools & Integrations

- ServiceTitan
- Housecall Pro
- Jobber
- FieldEdge
- ServiceFusion
- Workiz

## AI Business OS

## AI Business OS

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