INTERIOR DESIGN · BILLING OPERATIONS

Invoice generation and payment processing

Automatically generates professional invoices from completed design milestones and processes client payments through integrated payment systems. Streamlines billing workflows while ensuring timely collection and accurate project cost tracking.

01 WORKFLOW TRIGGER

Design milestone marked complete in project management system

BLUEPRINT OVERVIEW

What this workflow accomplishes

This workflow connects Houzz Pro milestone tracking to QuickBooks invoicing, Stripe payment capture, and Gmail client delivery. Automation calculates milestone billing from logged design hours, material costs, and vendor markups, then builds and routes the branded invoice. The principal designer or studio bookkeeper approves every amount before it reaches a client, and holds override authority on autopay charges and disputed line items.

01

OUTPUTS

Branded invoice with project renderings, Payment processing confirmation, Updated project financial dashboard, Client receipt and phase status

02

SUCCESS MEASURES

Days sales outstanding, Invoice-to-payment conversion rate, Average payment processing time

03

CORE SYSTEMS

Houzz Pro, QuickBooks, Adobe Creative Suite, Stripe, Gmail

HOW TO USE THIS BLUEPRINT

Principal designers: confirm the milestone scope matches what was actually delivered before releasing the invoice.

Studio bookkeepers: verify rate tables, vendor markups, and reimbursable receipts in QuickBooks each week so calculations pull clean.

Implementation teams: map Houzz Pro milestone fields to QuickBooks line items and set who can approve a Stripe autopay charge.

THE WORKFLOW

End-to-end stage map

Seven stages carry a completed design phase from milestone sign-off to a financially closed invoice. The decision point at stage four governs whether the client is charged automatically or receives an invoice for manual payment.

01 TRIGGER

Milestone completion detected

Detect completed design phase in project platform

Houzz Pro

02 ACTION

Calculate milestone billing amounts

Calculate hours, materials, and vendor markups due

Houzz Pro · QuickBooks

03 ACTION

Generate professional invoice

Build branded invoice with renderings and line items

QuickBooks · Adobe Creative Suite

04 DECISION

Check client payment preference

Route by stored client payment preference

QuickBooks · Stripe

AUTOPAY CHARGE

MANUAL INVOICE DELIVERY

05 ACTION

Process payment or send invoice

Charge card or email secure payment link

Stripe · QuickBooks · Gmail

06 ACTION

Update project financial tracking

Post payment and reforecast remaining project budget

Houzz Pro · QuickBooks

07 OUTPUT

Deliver payment confirmation

Send receipt and release next design phase

Gmail · Houzz Pro

LEGEND TRIGGER ACTION DECISION OUTPUT

IMPLEMENTATION DETAIL

Stage-by-stage breakdown

Each stage states the operational intent, the human control point, and the systems likely to take part. System names are examples, not a required architecture.

01 TRIGGER

Milestone completion detected

System detects when a design phase (concept, schematic, design development, or installation) is marked complete in the project management platform. Automatically pulls project details, completed scope, and billing rates.

CONTROL POINT

The project manager marks the phase complete in Houzz Pro and confirms punch items and client sign-off are closed before the billing trigger fires.

SYSTEMS Houzz Pro

02 ACTION

Calculate milestone billing amounts

Retrieves hourly rates, material costs, and vendor markups from the project database. Calculates total amount due based on completed work scope and pre-agreed milestone percentages.

CONTROL POINT

The studio bookkeeper reviews the calculated total against timesheets and vendor invoices, and can adjust any line before it moves forward.

SYSTEMS Houzz Pro QuickBooks

03 ACTION

Generate professional invoice

Creates branded invoice with project renderings, detailed line items for design hours, materials sourced, and vendor coordination fees. Includes payment terms and milestone deliverable summaries.

CONTROL POINT

The principal designer approves the invoice presentation, including which renderings and deliverable summaries appear in front of the client.

SYSTEMS QuickBooks Adobe Creative Suite

04 DECISION

Check client payment preference

Determines whether client has autopay enabled or requires manual invoice delivery. Routes to appropriate payment processing method based on stored client preferences.

CONTROL POINT

The bookkeeper verifies the client's signed autopay authorization is current before any stored card is charged.

SYSTEMS QuickBooks Stripe

COMPLETION AND MEASUREMENT

Closing stages and results

The closing stages reconcile the payment against remaining project budget and confirm to both client and design team that the phase is paid and the next one can start.

05 ACTION

Process payment or send invoice

Either automatically charges stored payment method for autopay clients or emails invoice with secure payment portal link. Sends copy to project manager and updates billing status.

CONTROL POINT

The principal designer can hold delivery on any account with an open change order or unresolved client dispute.

SYSTEMS Stripe QuickBooks Gmail

06 ACTION

Update project financial tracking

Records payment status in project dashboard and updates cash flow projections. Adjusts remaining budget allocation for subsequent project phases and vendor payments.

CONTROL POINT

The bookkeeper reconciles the Stripe deposit against the QuickBooks entry and confirms remaining phase and vendor allocations.

SYSTEMS Houzz Pro QuickBooks

07 OUTPUT

Deliver payment confirmation

Sends payment receipt to client with updated project timeline and next milestone preview. Notifies design team that phase is financially closed and next phase can commence.

CONTROL POINT

The project manager confirms the phase is financially closed before the team begins procurement or drafting on the next milestone.

SYSTEMS Gmail Houzz Pro

DELIVERABLES

- Branded invoice with project renderings
- Payment processing confirmation
- Updated project financial dashboard
- Client receipt and phase status

KEY METRICS

- Days sales outstanding
- Invoice-to-payment conversion rate
- Average payment processing time

IMPLEMENTATION CHECKS

- Stripe autopay consent on file
- Invoice approval routed to principal
- Rate and markup tables locked
- Audit trail on every amount change
- Client billing contacts kept current

NEXT STEP

Turn this blueprint into an implementation plan.

Map each stage to your own systems, permissions, and approval routing before selecting tools or building automation.

packfoundry.app/assessment

INTERIOR DESIGN WORKFLOW PACKS AND A FREE ASSESSMENT