

# Invoice processing and payment collection

Automates invoice generation after move completion, tracks payment status, and handles collections through multiple channels to reduce payment delays and improve cash flow.

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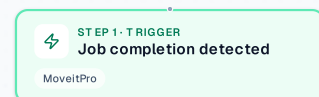


## WORKFLOW TRIGGER

Moving job marked as completed in crew management system

## Visual Flow

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



STEP 2 · ACTION  
**Generate and send invoice**  
SmartMoving MoveItPro

STEP 3 · ACTION  
**Track payment status**  
MoverBase SmartMoving

STEP 4 · DECISION  
**Check payment received**  
MoverBase

STEP 5 · ACTION  
**Send automated payment reminders**  
Vonigo SmartMoving

STEP 6 · ACTION  
**Flag for manual collections**  
ServiceTitan MoverBase

STEP 7 · OUTPUT  
**Update financial records**  
MoveItPro ServiceTitan



# Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

## Job completion detected

Workflow initiates when crew marks a moving job as completed in the system. Final crew notes and inventory confirmations are captured.

MoveitPro

2

 ACTION

## Generate and send invoice

Automatically creates invoice with actual services performed, materials used, and any additional charges. Invoice is immediately sent to customer via email.

SmartMoving

MoveitPro

3

 ACTION

## Track payment status

Monitors invoice payment status and automatically updates customer payment history. Sets payment due date reminders based on company terms.

MoverBase

SmartMoving

4

 DECISION

## Check payment received

Evaluates if payment has been received within the specified timeframe. Routes to collections process if payment is overdue.

MoverBase

5

### Send automated payment reminders

Sends escalating payment reminder emails and SMS messages to customers with overdue invoices. Includes payment portal links for easy processing.

Vonigo

SmartMoving

6

⚙️ ACTION

### Flag for manual collections

Creates tasks for collections team when automated reminders fail after set period. Generates customer contact history and payment analytics for follow-up calls.

ServiceTitan

MoverBase

7

📄 OUTPUT

### Update financial records

Records final payment status, updates accounts receivable, and generates cash flow reports. Closes invoice process and updates customer payment profile.

MoveitPro

ServiceTitan



## Outputs

- Processed invoice with payment confirmation
- Updated accounts receivable balance
- Customer payment history report



## Key Metrics

- Days sales outstanding (DSO)
- Invoice collection rate percentage
- Average payment processing time



## Tools & Integrations

- MoveitPro
- SmartMoving
- MoverBase
- Vonigo
- ServiceTitan

## AI Business OS

## AI Business OS

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