

Automated invoicing and payment processing

Automatically generates invoices when plumbing jobs are completed and processes customer payments through multiple channels. This reduces billing delays and improves cash flow by eliminating manual invoice creation and payment processing tasks.

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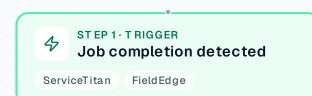


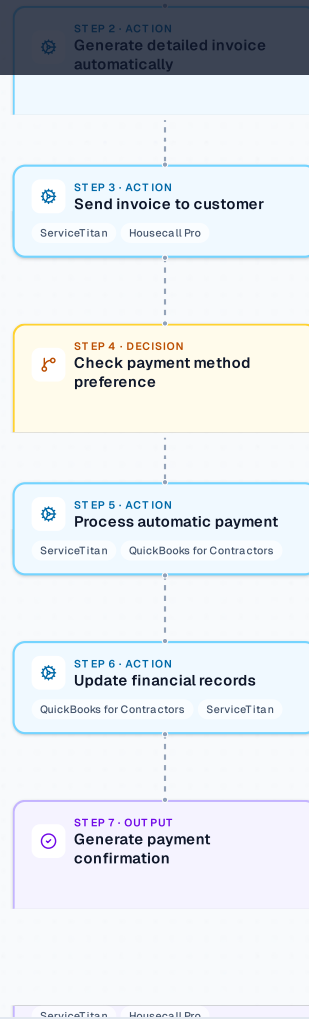
WORKFLOW TRIGGER

Technician marks plumbing 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

⚡ TRIGGER

Job completion detected

System detects when technician updates job status to completed with all labor hours, materials used, and service details recorded. This triggers the

automated billing process.

AI Business OS

ServiceTitan FieldEdge

2

 ACTION

Generate detailed invoice automatically

System pulls job data including parts costs, labor hours, service fees, and customer information to create a professional invoice. Invoice includes itemized breakdown and company branding.

ServiceTitan

QuickBooks for Contractors

3

 ACTION

Send invoice to customer

Invoice is automatically emailed to customer with payment options and due date. Customer receives SMS notification with payment link for immediate processing.

ServiceTitan

Housecall Pro

4

 DECISION

Check payment method preference

System determines if customer has saved payment method on file or prefers manual payment processing. Routes to appropriate payment handling workflow.

ServiceTitan

Housecall Pro

5

 ACTION

Process automatic payment

For customers with saved cards, system automatically charges payment method and sends receipt. For manual payments, sends follow-up reminders according to schedule.

ServiceTitan

QuickBooks for Contractors

6

 ACTION

Update financial records

Payment information syncs to accounting system updating accounts receivable, revenue tracking, and customer payment history. Creates audit trail for all transactions.

QuickBooks for Contractors

ServiceTitan

7

 OUTPUT

Generate payment confirmation

System sends payment confirmation to customer and updates internal dashboards with revenue metrics. Technician receives notification that job billing is complete.

ServiceTitan

Housecall Pro



Outputs

- Automated invoice generation

AI Business OS

- Payment processing confirmation
- Updated financial records
- Customer payment receipts



Key Metrics

- Average time from job completion to invoice sent
- Payment collection rate
- Days sales outstanding (DSO)



Tools & Integrations

- ServiceTitan
- FieldEdge
- QuickBooks for Contractors
- Housecall Pro

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