

# Time tracking and billing automation

Automatically captures time entries from project management tools, validates billable hours, and generates client invoices while updating project budgets and profitability metrics in real-time.

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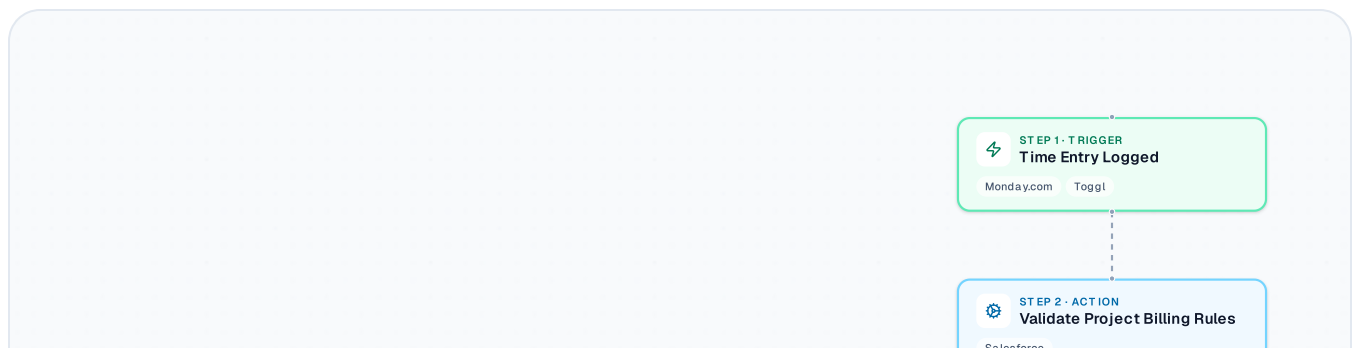


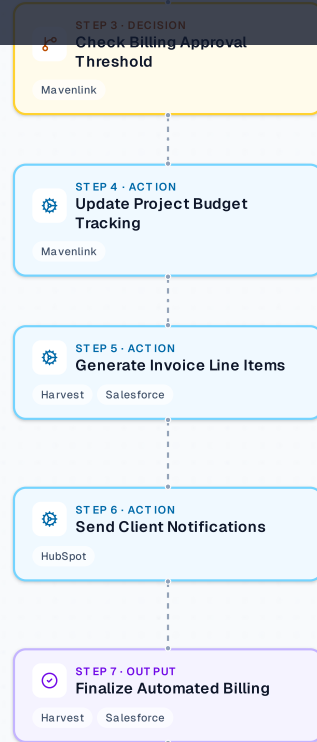
## WORKFLOW TRIGGER

Team member logs time entry in project management system or time tracking tool

## 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

## Time Entry Logged

A team member records time spent on a client project through Monday.com or Toggl. The system captures project details, duration, task type, and team member information.

Monday.com

Toggl

2

 ACTION

## Validate Project Billing Rules

Cross-references the time entry against client contract terms in Salesforce to determine billability, rate tier, and any cap restrictions. Applies correct billing rates based on team member role and client agreement.

Salesforce

3

 DECISION

## Check Billing Approval Threshold

Evaluates if the time entry exceeds pre-defined thresholds for automatic approval based on project budget or client spending limits. Routes high-value entries for manual review.

Mavenlink

4

 ACTION

## Update Project Budget Tracking

Automatically updates project burn rate, remaining budget, and profitability metrics in Mavenlink. Flags projects approaching budget limits or timeline overruns.

5

 ACTION

### Generate Invoice Line Items

Creates detailed invoice entries with task descriptions, time allocations, and billing amounts. Aggregates entries by billing period and client preferences for consolidated invoicing.

Harvest

Salesforce

6

 ACTION

### Send Client Notifications

Automatically emails clients with weekly time summaries and upcoming invoice previews through HubSpot. Provides transparency and opportunity for client feedback before final billing.

HubSpot

7

 OUT PUT

### Finalize Automated Billing

Generates final invoices in Harvest with all approved time entries, updates client records in Salesforce, and creates utilization reports for management review.

Harvest

Salesforce



## Outputs

- Automated client invoices with detailed time breakdowns
- Updated project profitability and budget tracking reports
- Team utilization and billable hour analytics



## Key Metrics

- Billable utilization rate percentage
- Time-to-invoice processing speed
- Client billing accuracy rate



## Tools & Integrations

- Monday.com
- Toggl
- Salesforce
- Mavenlink
- Harvest
- HubSpot

## AI Business OS

## AI Business OS

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