ROOFING · BILLING AND COLLECTIONS

Invoice generation and payment processing

Automatically generates invoices upon roofing job completion and processes customer payments while handling approval workflows for large amounts. This reduces billing delays and improves cash flow for roofing contractors.

01 WORKFLOW TRIGGER

Roofing project status is marked as 'Completed' in project management system

BLUEPRINT OVERVIEW

What this workflow accomplishes

This workflow connects JobNimbus job status, SumoQuote change orders, and CompanyCam field documentation so an invoice leaves the office the same day the crew tears down staging. Automation pulls actual squares installed, bundles used, labor hours, and completion photos into a branded invoice, then runs the payment gateway and the receivable reports. The production manager still verifies material reconciliation, and any invoice over threshold does not go out without an owner or GM signature.

01

OUTPUTS

Branded invoice with job documentation, Payment receipt to homeowner, Updated AR reports and dashboards

02

SUCCESS MEASURES

Days sales outstanding, Invoice turnaround from completion, Collection rate on sent invoices

03

CORE SYSTEMS

JobNimbus, SumoQuote, CompanyCam

HOW TO USE THIS BLUEPRINT

Owners and GMs: set the approval threshold and decide who can release a held invoice.

Production managers: confirm material reconciliation and completion photos before the invoice generates.

Implementation teams: map JobNimbus job stages, SumoQuote change orders, and CompanyCam albums to the invoice template fields.

THE WORKFLOW

End-to-end stage map

Seven stages carry a completed roof from final tear-off to cleared funds. The decision point at stage four governs whether the invoice sends automatically or waits for manager review on high-dollar jobs.

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

Job completion detected

System detects when a roofing project is marked as completed in the job management platform. This triggers the automated invoice generation process.

CONTROL POINT

The production manager marks the job Completed only after final walkthrough and dumpster pickup, so the trigger is a human act.

SYSTEMS JobNimbus

02 ACTION

Calculate final project costs

System pulls actual materials used, labor hours, and any change orders to calculate the final invoice amount. Material costs are reconciled against initial estimates.

CONTROL POINT

Production manager verifies bundle counts and accessory quantities against supplier delivery tickets before totals lock.

SYSTEMS JobNimbus SumoQuote

03 ACTION

Generate invoice with documentation

Creates professional invoice including project photos, material receipts, and work completion documentation. Invoice is automatically formatted with company branding.

CONTROL POINT

Office admin reviews the assembled invoice and can swap or remove any CompanyCam photo before it is attached.

SYSTEMS JobNimbus CompanyCam

04 DECISION

Check invoice amount threshold

Evaluates if invoice amount exceeds preset approval threshold (e.g., $15,000). High-value invoices require manager review before sending to customer.

CONTROL POINT

Owner or GM holds sole authority to release invoices above the threshold and may override the amount or terms.

SYSTEMS JobNimbus

COMPLETION AND MEASUREMENT

Closing stages and results

The last two stages capture the money, post it against the job, and keep aging visible so nothing sits past terms.

05 ACTION

Send invoice to customer

Automatically emails invoice to customer with payment portal link and project completion photos. Sets up automated payment reminders for unpaid invoices.

CONTROL POINT

Office admin confirms the homeowner or insurance contact on file and can suppress reminders on financed or insurance-pending jobs.

SYSTEMS JobNimbus CompanyCam

06 ACTION

Process payment and update records

Handles credit card, ACH, or check payments through integrated payment gateway. Updates customer payment history and project financial records in real-time.

CONTROL POINT

Bookkeeper matches deposits to the job and manually posts checks and insurance drafts, including mortgage company endorsements.

SYSTEMS JobNimbus

07 OUTPUT

Payment confirmation and reporting

Sends payment confirmation to customer and updates financial dashboards. Generates accounts receivable reports and flags any overdue payments for follow-up.

CONTROL POINT

Owner reviews the aging report weekly and decides which past-due jobs move to collection calls or lien notice.

SYSTEMS JobNimbus

DELIVERABLES

- Branded invoice with job documentation
- Payment receipt to homeowner
- Updated AR reports and dashboards

KEY METRICS

- Days sales outstanding
- Invoice turnaround from completion
- Collection rate on sent invoices

IMPLEMENTATION CHECKS

- Threshold approval routing to owner
- Gateway credentials scoped, not shared
- Photo album permissions per job
- Change orders synced before totals
- Payment records write back to job

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

ROOFING WORKFLOW PACKS AND A FREE ASSESSMENT