

# 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.

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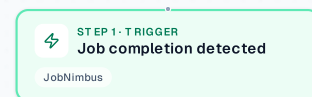


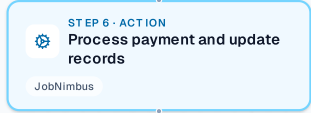
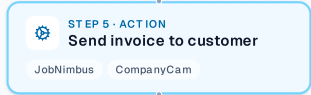
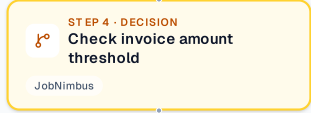
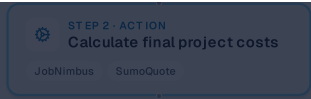
## WORKFLOW TRIGGER

Roofing project status is marked as 'Completed' in project 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 a roofing project is marked as completed in the job management platform. This triggers the automated invoice generation process.

2

 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.

JobNimbus

SumoQuote

3

 ACTION

### Generate invoice with documentation

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

JobNimbus

CompanyCam

4

 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.

JobNimbus

5

 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.

JobNimbus

CompanyCam

6

 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.

JobNimbus

7

 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.

JobNimbus



## Outputs

- Professional invoice with project documentation

- Payment confirmation receipt

## AI Business OS



### Key Metrics

- Days Sales Outstanding (DSO)
- Invoice processing time
- Payment collection rate



### Tools & Integrations

- JobNimbus
- SumoQuote
- CompanyCam

## AI Business OS

Actionable AI implementation strategies for business leaders ready to transform their operations.

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