

Close jobs with an invoice-ready record

Completed work reaches billing with missing evidence, uncertain variations and no clear confirmation the job is ready to close.

ACCOUNTABLE OWNER

Service manager or job-closeout owner

Five-step controlled trial

1. Select a small job sample

Use five completed jobs from one work type. Define required closeout documents and use synthetic or de-identified records where needed.

2. Separate facts from assumptions

Record job reference, completion evidence, customer sign-off if present, variation evidence, issue, owner and billing-ready status.

3. Draft the closeout register

Use AI to organise supplied notes and attachments. It flags differences between quoted work and completion records for review.

4. Approve the closeout

The service manager checks evidence, commitments and variations before billing readiness. Finance retains invoice approval.

5. Measure the result

Track first-review completion, billing delays, variation disputes, evidence gaps and corrections before invoice preparation.

Use synthetic or de-identified information in an organisation-approved tool. Keep sends, approvals and system changes outside the trial until a person authorises them.

A practical test you can run

Starter prompt

Using only the job records below, create a closeout register: job reference, stated work completed, evidence source, customer confirmation if explicit, variation evidence, unresolved issue, owner and billing readiness. Flag conflicts and missing facts REVIEW or UNKNOWN. Do not create an invoice, change job status, contact a customer or infer approval.

Synthetic worked example

Synthetic job note: 'Installed replacement pump. Photos attached. Customer said it is running.' The quote allowed standard fittings; no variation is mentioned. Expected: record stated work and photos, note customer confirmation, mark variation status UNKNOWN.

Measure before and after

Jobs complete at first review; time from completion to billing-ready decision; evidence gaps; variation exceptions; corrections before invoice preparation. Do not treat prepared invoices as paid revenue.

Trial worksheet

Workflow / segment	
Owner and reviewer	
Baseline result	
Trial result	
Errors / exceptions	
Decision: stop, revise or expand	

Stop condition

Stop if completion or acceptance is inferred, variations are priced without approval, records change automatically or any invoice is issued without finance review.

Need a system around this workflow?

[Discuss a scoped workflow diagnostic with Aqi360](#)

This guide prepares a controlled trial. A paid diagnostic, delivery scope, integrations and pricing are agreed separately.