CASE STUDY

Invoices Done Before You Leave the Client Site

How a Trades Owner Got His Evenings Back by Cutting 3 Hours of Weekly Invoicing to Minutes

Owner-operated trades business · 5 to 10 person team

CUSTOM AUTOMATION BUILD · 4 WEEKS

THE CHALLENGE

The owner runs a 5 to 10 person trades team and wrote every invoice himself. After the field work was done, he rebuilt each job from memory: what was done, which parts went in, how long it took, and what to charge. When a tech ran the job, the details came secondhand, so filling in a part number or the time on site meant texting the crew or the office hours or days later. Then he typed up each scope in the field-service software and priced every line by hand. That meant a full day on site, then invoices in the evening, about 3 hours a week of them.

OUR APPROACH

We made the invoice as easy as a voice memo and a text. The owner, or whichever tech ran the job, texts a 1 to 2 minute voice note to a dedicated number before leaving the site. AI writes the scope the way the owner writes it, with his vocabulary, structure and level of detail trained on the business's past invoices. It then prices each line against more than 2,000 of those invoices, finds the matching job in the field-service software, and adds the line items to it. A text comes back within minutes. He reviews it and clicks complete. The same voice note, sent before a job, returns a priced quote.

Built in 4 weeks, then refined in weekly sessions on real jobs.

THE RESULTS

3 hrs → minutes
Owner time on invoicing each week

150
Owner hours returned per year

1–2 min
Voice note per job, then two clicks

2,000+
Past invoices behind every price and every scope

4 weeks
Hands-on build time

> "I do the voice note, wait for the text, click complete, and everything's already in there."
>
> OWNER, TRADES BUSINESS, ON THE DAILY WORKFLOW

WHAT WE BUILT

- **Voice intake:** a dedicated number that takes voice notes from any phone, with no app to install
- **Scope writer:** turns a quick spoken note into a step-by-step scope of work in the owner's own wording and layout, trained on real past invoices
- **Pricing engine:** prices each line from 2,000+ past invoices and flags any price it is unsure of
- **Job matcher:** finds the right job by customer name, address and the work described
- **Write-back and confirmation:** line items land on the job, and a text and email confirm what was added
- **Safety net:** when no job matches clearly, nothing is written and the draft arrives by email ready to paste

Beyond the hours: the owner now reviews invoices instead of writing them, and each job is written up on site while the details are fresh, so nobody gets chased for them days later.

Prepared by Harmonic Intelligence

ONE TOOL FOR QUOTING AND INVOICING

The same voice note drives both. When a new lead needs a fast price, the office sends a note describing the work, and the system drafts the scope and a price from the business's own history for the owner to approve. The owner has also priced a job on site with the customer, landing close to the number he had in mind. Every completed invoice feeds back into the pricing, so quotes and invoices both get sharper over time.

WHERE THIS APPLIES

Any owner-operated service business where the owner or a technician writes up every job: plumbing, HVAC, electrical, roofing, landscaping, cleaning and restoration. The build sits on top of the field-service software your team already uses, and can connect to platforms such as Jobber, Housecall Pro and ServiceTitan.