

Service Request to Paid Invoice

This workflow follows a reported service problem through the service order, booking, dispatch, technician activity, office review, billing, and payment. The office and technician continue from connected customer, equipment, schedule, time, parts, labor, and billing records instead of rebuilding the job at each handoff.

“ **Demonstration notice:** Every person, location, item, identifier, amount, and transaction is fictional. Mobile alerts and payments are suppressed or simulated; no message or processor request is sent.

Workflow at a glance

Outcome	Completed service work reviewed, billed, and paid or placed on account
Starts with	A verified customer, service subject, and reported issue
Ends with	Billing/payment state and retained customer service history
Primary roles	Service coordinator, dispatcher, technician, billing clerk
Brisk areas involved	Service, Dispatch, Time, Inventory, Sales, Accounting
Common businesses	Equipment, HVAC, appliance, motor, and general repair
Approximate handoffs	Four

Why this workflow matters

Service work loses context when intake notes, a schedule, technician time, parts, and the invoice live in separate places. The Service Order retains the work content while bookings coordinate when and by whom it should be performed.

Billing remains a deliberate office handoff. A completed technician visit is not automatically a paid invoice, and a timer entry is not necessarily approved billable time.

Before you begin

[Modify](#)
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[Attachments \(0\)](#)
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Equipment Detail - DOC-C-001 | Contoso Garden Center (Documentation Demo) - DOC-EQ-001 System ID: 3

[Equipment Summary](#)
[All Fields](#)
[Service Orders](#)

Equipment Summary

CUSTOMER	DOC-C-001 Contoso Garden Center (Documentation Demo)
CATEGORY	Documentation Demo Pump
DESCRIPTION	Fictional irrigation pump
STATUS	-
MAKE	-
MODEL	EX-100
SERIAL NUMBER	FICTIONAL-0001

Recent Service Orders

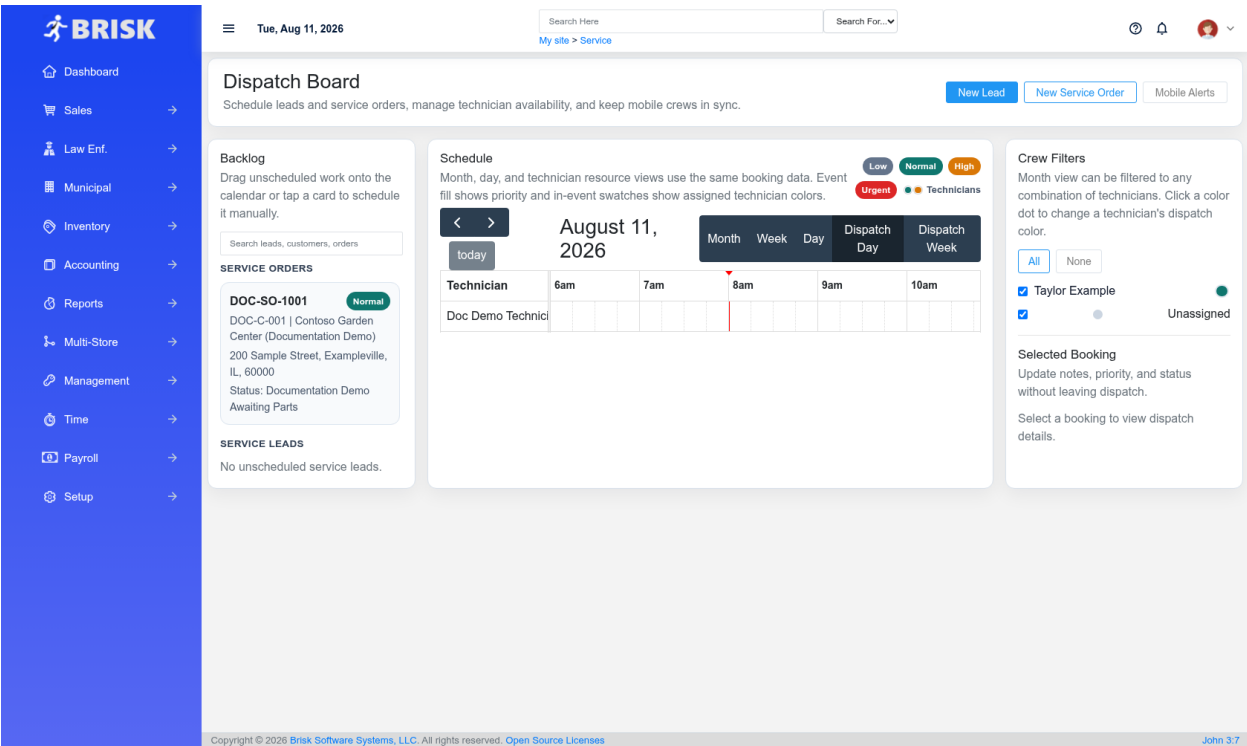
Click a service order to view details.

Service Date	SO #	Memo
01-15-2025	DOC-SO-1001	Inspect pump and install fictional service kit.

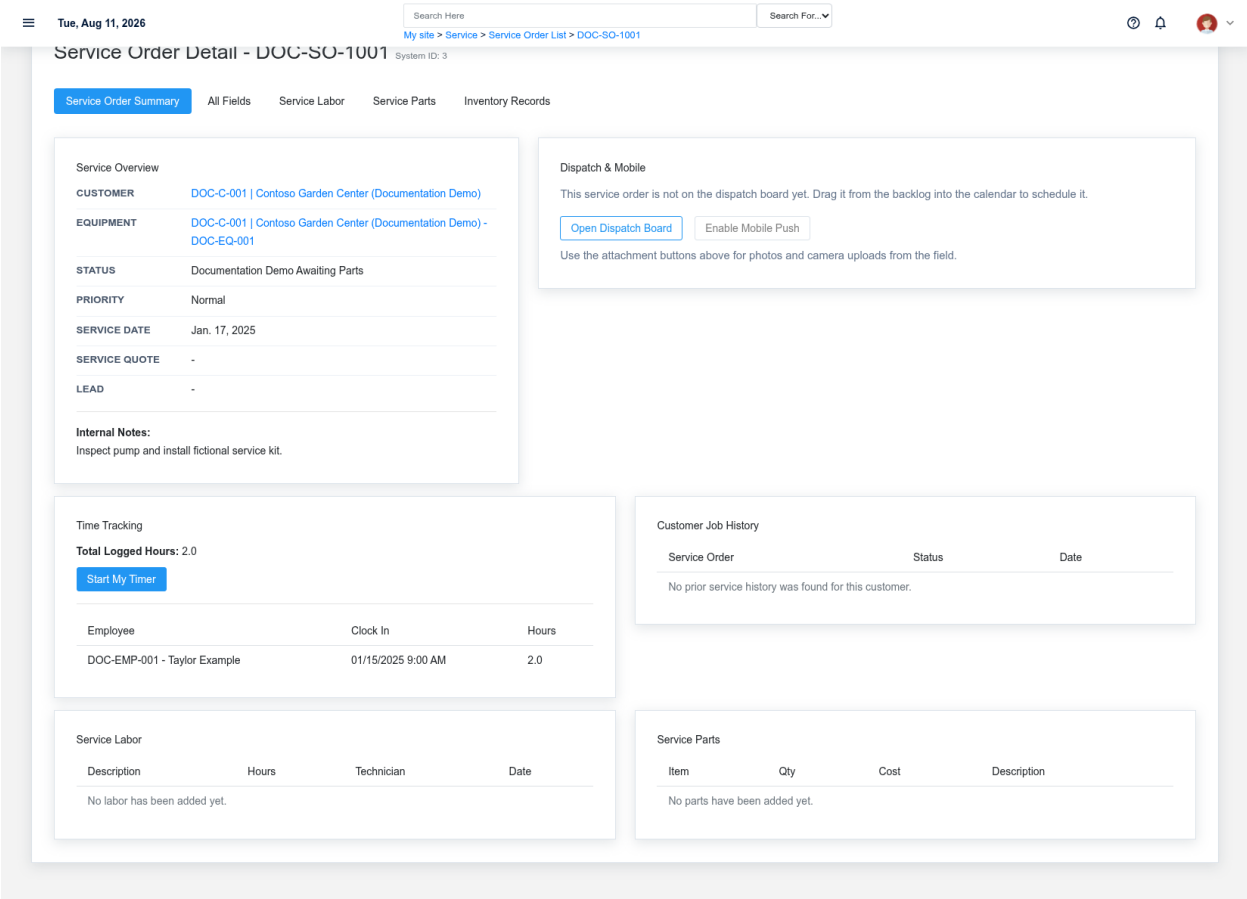
Equipment history gives the office and technician the same service subject before a job is created.

- Required: customer, service location/context, equipment when used, service category/status, warehouse, and authorized service staff.
- Required for dispatch: active Technician linked to the employee/user and valid working hours.
- Required for billing: reviewed parts, labor, tax, price, and payment terms.
- Optional: mobile alerts, customer equipment, timer use, sandbox payment provider.

End-to-end steps



Dispatch assigns a booking and time without changing the underlying job scope.



The service order retains the reported issue, equipment, warehouse, priority, and current work status.

1. **Coordinator — verify context.** Open [Customers](#) and [Equipment](#). Confirm the fictional unit, location, history, issue, and approved scope.

2. **Coordinator — create the Service Order.** Enter the customer, equipment, warehouse, category, priority, memo, and current [Service Status](#). DOC-SO-1001 is Awaiting Parts; it is not yet completed or invoiced.
3. **Dispatcher — create and assign a Booking.** Use the [Dispatch Board](#) to set the supported date/time and technician. Review dispatch notes and alert state; the documentation fixture does not send a real alert.
4. **Technician — work from Technician Workspace.** Open [Technician Workspace](#), confirm the assigned booking, then open the same Service Order. Record only actual status, time, notes, parts, and labor.
5. **Technician — complete the actual work.** Stop the timer, write completion notes, and move status only through the offered transition. Part inventory effects depend on the supported posting/conversion event; adding a note does not consume stock.
6. **Office — review and convert.** Confirm completed scope, time, parts, labor, prices, tax, and customer authorization. Use the supported Service Order conversion to create/connect the Sale or Service Invoice; the Service Order remains the job-content source.
7. **Billing clerk — collect and verify.** Record a safe tender or place the invoice on account. Confirm the Sale/Invoice payment state, customer history, item history, time entries, and reporting before calling the workflow paid.

What Brisk keeps connected

Tue, Aug 11, 2026

Search Here

Search For...

My site > Service > Service Order List > DOC-SO-1001

?

🔔

Save

Cancel

Delete

< Previous

Next >

Attach from Camera

Service Order Update - DOC-SO-1001

System ID: 3

Service Order #

DOC-SO-1001

Customer +

DOC-C-001 | Contoso Garden Center (Documentation Demo)

Equipment +

DOC-EQ-001/None / EX-100 / FICTIONAL-0001

Service Quote +

Submit Without Equipment

Equipment is required unless you enable this override.

Status

Documentation Demo Awaiting Parts

Priority

Normal

Type

Documentation Demo Preventive Maintenance

Warehouse

DOC-W-001 - Documentation Demo Warehouse

Memo

Inspect pump and install fictional service kit.

Service Date

01/17/2025

Mileage/Hours

120.00

Converted

☐

Allow missing equipment

Service Labor

Description

Hours

Technician

Service Date

Delete

Click to sele

✖

Add Row

Service Parts

Item +

Quantity

Cost

Description

Delete

✖

Add Row

Status, notes, parts, labor, and time should reflect work actually performed before billing.

My site > Technician Workspace

Request Leave

Mobile Alerts

Dispatch Board

Leave Approvals

Technician Workspace

Taylor Example | Doc Demo Technician

TODAY'S JOBS

0

Assigned work scheduled for today.

NEXT 7 DAYS

0

0.0 scheduled hours.

PENDING LEAVE

0

Requests waiting on supervisor approval.

PUSH DEVICES

0

Registered via Mobile Alerts.

Today's Schedule

See the jobs on deck for today and open the details you need.

No active bookings are scheduled for today.

Work Queue

Update dispatch status, handle timers, and work through upcoming assignments.

No open work items need action right now.

Upcoming Work

The next scheduled jobs on your dispatch calendar.

No future bookings are scheduled yet.

Leave Requests

Track pending requests and upcoming approved time away.

Request Leave

No pending leave requests.

Approved Leave

No approved leave on the calendar.

Working Hours

Recurring availability used by dispatch when planning your week.

No recurring hours have been configured yet.

Recently Completed

A quick look back at the last jobs you closed out.

No completed dispatches are available yet.

The technician sees assigned bookings and opens the same service order used by the office.

Action	Result or downstream record	Where to verify it
Create and schedule job	Service Order plus assigned Booking	Service Order and Dispatch Board
Record technician work	Status, notes, time entries, parts/labor context	Service Order and Technician Workspace
Convert reviewed work	Linked Sale or Service Invoice	Service Order and resulting billing detail
Record payment/on-account balance	Payment or receivable history	Sale/Invoice and customer inquiry

Handoffs and controls

Search Here

Search For...

My site > Customer A/R Inquiry

Review a customer's open invoices, finance charges, payments, credits, and receivable history.

Customer

Inquiry View

Begin Date

End Date

Aging Date

Invoice / Reference

Open Invoices

MM/DD/YYYY

MM/DD/YYYY

08/11/2026

Invoice, check, memo...

☒ Show Customer Payments

Balances and aging always include posted payments.

Load Inquiry

Clear

Select a customer to load their receivable inquiry.

Customer history and receivables provide the final accounting check when service is billed on account.

Modify

Cancel

New

Create Copy

Return

< Previous

Next >

Attachments (0)

Email

Sale Detail - DOC-SALE-1001

System ID: 3

Sale Summary

All Fields

Item Rows

Sale Payments

Sale Fulfillments

Transactions

Inventory Records

DOC-SALE-1001

Jan. 15, 2025, 9 a.m.

DOC-C-001 | Contoso Garden Center (Documentation Demo)

200 Sample Street

Exampleville, IL 60000

Memo: Documentation demo customer order.

Item	Quantity	Price	Total Price	Tax
DOC-ITEM-001 - Doc Demo Filter Cartridge	2.00	\$24.00	\$48.00	\$0.00
			Subtotal:	\$48.00
			Tax:	\$0.00
			Total:	\$48.00
Billing				
			Total Amount Paid:	\$0.00

Conversion carries reviewed service work into the supported Sale or Service Invoice path; payment is a later state.

The coordinator owns intake accuracy, dispatch owns assignment, the technician owns work evidence, and the office owns billing review. Scheduled, dispatched, in progress, completed, invoiced, and paid describe different events. Permission boundaries should prevent a technician from silently rewriting dispatch or accounting decisions.

Exceptions and safe corrections

- Wrong customer/equipment before work: correct the Service Order and Booking together.
- Missing part: use an honest waiting status; do not mark work completed.
- Timer left open: correct the time entry with supervisor review before billing.
- Wrong part or labor: correct reviewed job detail before conversion; use supported credit/return paths afterward.
- Payment pending or failed: keep invoiced and paid states separate and verify provider history before retrying.

Related documentation

Start here

- [Service Orders](#)

- [Dispatch Board](#)

Continue with

- [Technician Workspace](#)
- [Time Clock Entries](#)
- [Sales](#)

Related controls and reports

- [Service Mobile Alerts](#)
- [Receivable Transactions](#)

Could Brisk Simplify This Process for Your Team?

See how this workflow could be configured around your records, permissions, approvals, and reporting requirements.

[Request a focused Brisk demonstration](#)

Revision #2

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