



Service Closure Manager

Assures the quality of what the field reported, the debrief and the cost and sales lines, before anything is invoiced. Raises the invoice preview, never approves it, and closes the request once billing is settled.



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The Challenge Today

Completed work often reaches invoicing with little confidence in what was actually done. A thin debrief, missing time, unreported materials, or mispriced sales lines may not be discovered until an invoice is disputed or another technician revisits the job. By then, the technician may no longer remember the details, reviewers are left chasing answers, and revenue decisions are made from an incomplete record. At the same time, completed requests sit unclosed because closure becomes backlog work no one owns, causing operational reporting to drift further from reality.

How it Works?

When a service scope completes, the Service Closure Manager reviews what was reported and asks a simple question: is this ready to invoice and close? It checks whether the debrief genuinely describes the job, whether materials, returns, and time reconcile with what the system recorded, and whether the sales lines are priced correctly. If everything holds up, it raises an invoice preview for a person to approve. If it doesn't, the scope stops with a person and the reason is visible. The worker never edits the record and never approves its own preview. Once the request is fully invoiced, it closes it automatically.

Validate every debrief



Every completed scope has its debrief validated before invoicing starts.

Checks happen here, not downstream.



Validates materials, returns, labor, sales, and time against job notes, not after invoicing.

Surface follow-up work



Flags follow-up work for a person to decide, so nothing closes with open work hidden.

Close settled requests



Closes only when work is done, revenue is settled, and no follow-up is pending.

Raise the preview, never approve it



Creates the invoice preview upon check holds. A person approves, at any value.

Exceptions stop with a person



Anything that does not hold goes to a person, and the scope holds.

Bounded by design



Never edits a debrief, never adjusts a line, never approves its own preview.

Tuned per service organization



Tolerances, thresholds, job scope, and recipients are configuration, not code.

Integrations

Enterprise Applications



Collaboration



Email



Agentic Skills



Debrief Validation



Cost and Sales Validation

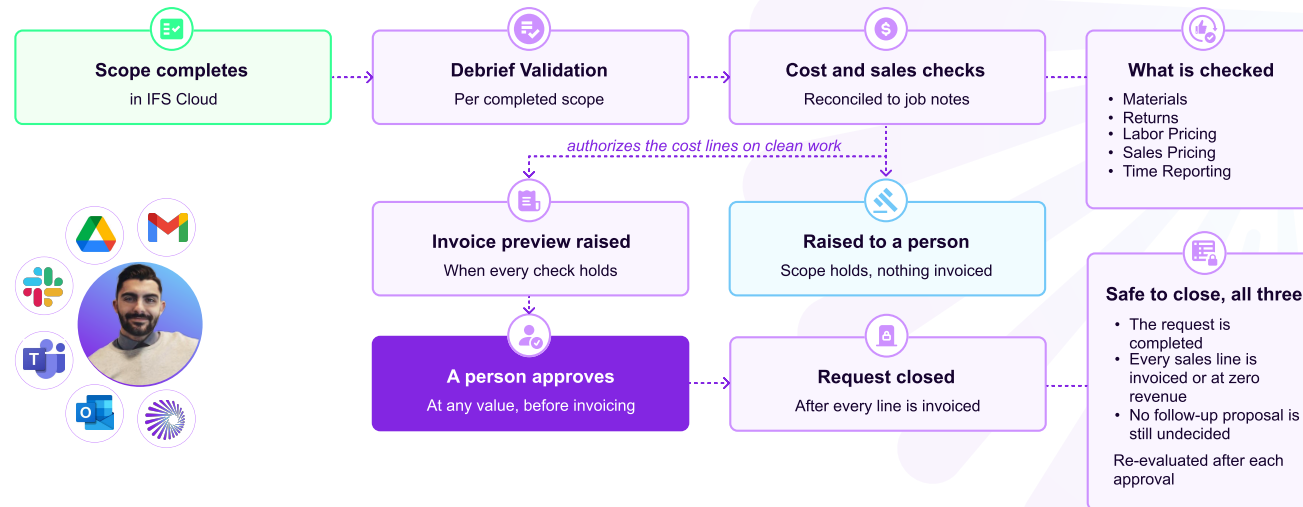


Invoice Preview



Request Closure

Smarter Service Closure



Key Problems Solved

- ✓ No thin debrief passes as done: every completed scope has its debrief validated before invoicing.
- ✓ Materials, returns, labor and sales pricing, and time are reconciled against the technician's own notes.
- ✓ Un-billed and mis-priced work is caught before the invoice leaves, instead of one dispute at a time.
- ✓ Nothing reaches an invoice on an unchecked record, and no invoice moves without a person approving it.
- ✓ Settled requests close automatically once every line is invoiced, so no closure backlog builds.
- ✓ Detects follow-up work and flags it as a proposal for a person to decide, so nothing closes with open work still hidden.

Business Value & Impact



Disputes prevented

The record supports the charge before the invoice leaves.



Leakage caught

Missing, zero-priced, and off-price sales lines found before invoicing.



Reviewers on exceptions

A clean scope arrives as a preview ready to approve.



Cleared closure backlog

Settled requests close, so ageing reflects reality.



A human gate that holds

Approval sits with a person, at any value.



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