COREXA

PRODUCT WORKFLOW STUDY

# From completed service work to an invoice-ready and reconciled accounting record

A job-to-cash workflow showing how Corexa can connect technician completion, administrative review, invoice generation, Xero synchronisation and payment visibility.

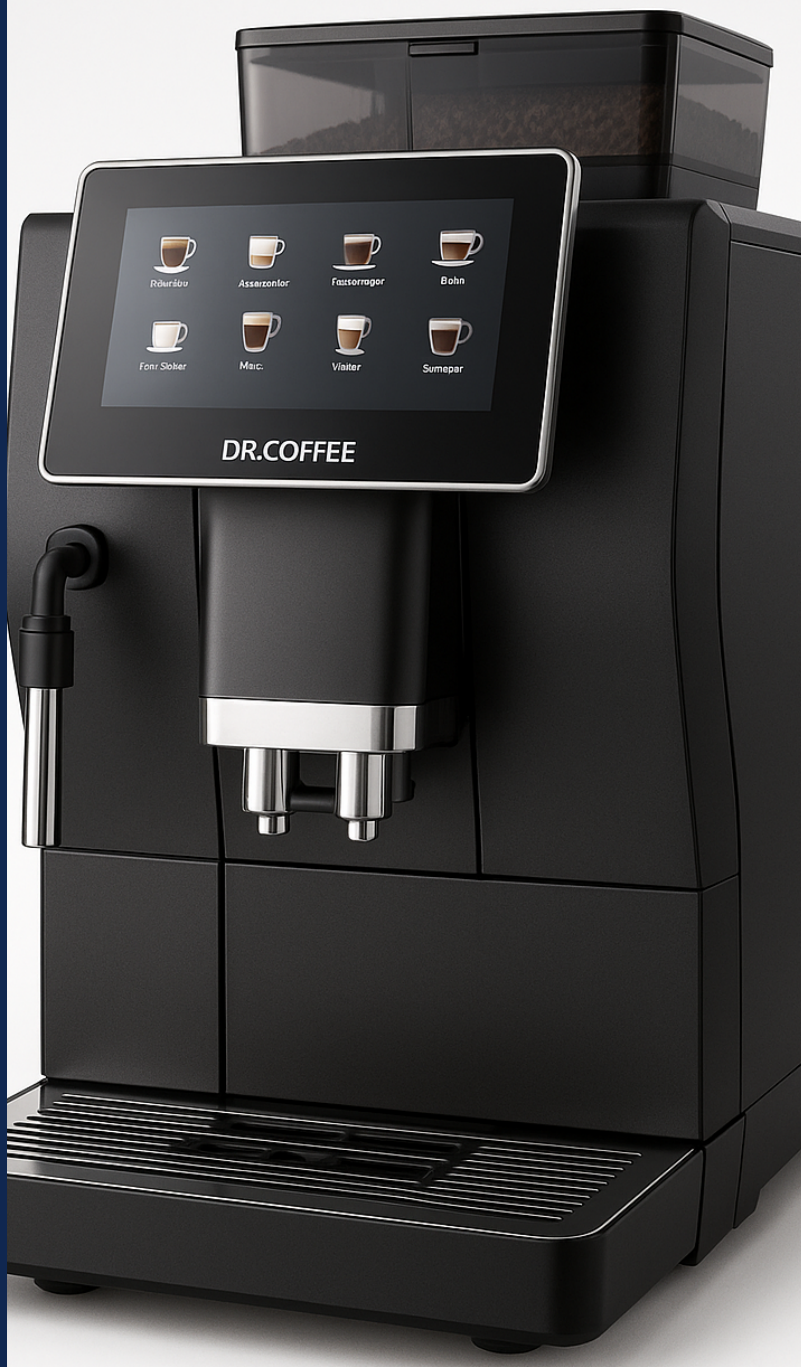
Evidence level stated clearly throughout

**Repository-reviewed**
Capability basis

**Job-to-cash**
Commercial workflow

**Xero-connected**
Accounting pathway

**Pilot required**
Outcome standard



THE CHALLENGE

# Why the existing process breaks down

A machine can be operating again while the business still lacks a complete invoice record. Missing labour, parts, photos, approvals or completion notes force administration to reconstruct the job. The accounting handoff then creates another opportunity for duplicates, mismatched totals or stale payment status.

01

### Completed is not invoice-ready

The technician may close the work without all chargeable labour, parts or additional fees recorded.

02

### Administration rebuilds the job

Office staff must call the technician, inspect photos and interpret notes before drafting an invoice.

03

### Line items lose operational meaning

Accounting descriptions can become separated from the machine, job and technical work that created them.

04

### Duplicate records are possible

Retrying a sync or manual creation can produce more than one accounting record for the same service event.

05

### Sent and paid states diverge

The job, Corexa invoice and Xero invoice can show different statuses if reconciliation is delayed.

06

### Corrections happen too late

An incomplete invoice may reach the customer before missing parts, discounts or service dates are identified.

**The central risk**

Revenue recognition and customer communication depend on a record assembled after the technical work, rather than a controlled progression from the completed job.

THE OPERATING MODEL

# A connected workflow around the machine

Corexa can use the completed job as the source for administrative review, invoice creation and accounting sync. Each stage has a visible status so technical completion, commercial readiness, sending and payment do not collapse into one ambiguous state.

1. **Complete**
   Technician records labour, parts, evidence, notes and any follow-up requirement.
2. **Review**
   Administration validates chargeable scope, customer details, dates and line-item mapping.
3. **Create**
   Generate the Corexa invoice from the approved job record.
4. **Synchronise**
   Send the invoice to Xero using controlled identity and idempotency safeguards.
5. **Reconcile**
   Track sent, paid and exception states back against the job and customer record.

| COREXA CAPABILITY | OPERATIONAL CHANGE | WHY IT MATTERS |
|---|---|---|
| **Structured completion** | Captures labour, call-out, parts, notes and media within the job workflow. | The invoice source contains more of the information required for commercial review. |
| **Invoice-ready status** | Separates technically complete work from work ready to invoice. | Administration has a controlled checkpoint before customer delivery. |
| **Invoice generation** | Creates an invoice record connected to the job and customer. | The financial record retains its operational source. |
| **Xero integration** | Supports authenticated Xero requests, token refresh and invoice synchronisation. | Accounting entry can be automated without abandoning the Corexa service record. |
| **Idempotent sync design** | Uses stable identifiers or idempotency controls to reduce duplicate creation on retry. | Integration failure can be retried more safely. |
| **Payment visibility** | Allows paid state and payment timing to be represented back in Corexa. | Operations can see whether completed work has progressed through the full commercial lifecycle. |

CREDIBILITY STANDARD

# What is supported - and what is not yet claimed

A credible case study distinguishes repository evidence, real workflow scope and future outcome hypotheses. The evidence level below is deliberately explicit.

### Repository capability

The repository includes invoice APIs and pages, Xero client utilities, sync details, purchase and invoice accounting components and job-linked commercial fields.

### Workflow control

Corexa represents multiple job and invoice states rather than treating technical completion as immediate payment.

### Credible limitation

Successful Xero operation requires valid configuration, mapping, permissions and error handling. Repository presence is not evidence of perfect sync performance.

### Pilot requirement

A defined invoice cohort should be traced from technician completion through accounting sync, customer delivery and payment.

Not yet claimed: this case study does not present a measured productivity, revenue, accuracy or customer-satisfaction improvement. A controlled baseline and participant-approved result are required before those claims are published.

## Measurement plan for the publishable version

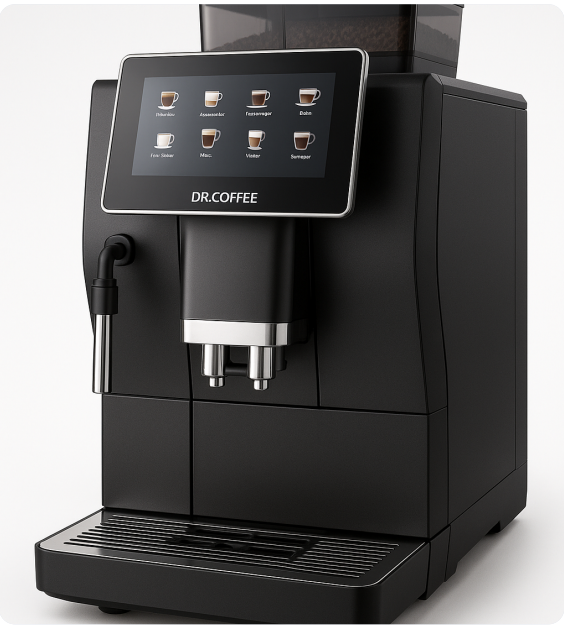
| MEASURE | EVIDENCE SOURCE | CREDIBLE REPORTING |
|---|---|---|
| **Completion-to-invoice time** | Job and invoice timestamps | Median time from technician completion to invoice sent. |
| **Clarification rate** | Admin notes and messages | Percentage of completed jobs requiring technician clarification before invoicing. |
| **Invoice correction rate** | Invoice revisions or voids | Percentage of invoices corrected after initial creation or sending. |
| **Unsynchronised invoices** | Integration status register | Count and age of Corexa invoices not confirmed in Xero. |
| **Duplicate prevention** | Job-to-invoice audit | Jobs with more than one unintended accounting invoice. |
| **Payment reconciliation latency** | Paid timestamps | Time between payment recorded in Xero and visibility in Corexa. |

> *"The most reliable invoice begins as a complete service record, not as an accounting document rebuilt from memory."*

MAKE THE STORY TANGIBLE

# Show every commercial state from completed job to paid invoice

A credible visual sequence should show the technician record, administrative checkpoint, invoice line items, Xero status and reconciled payment. Include exception states as well as the ideal path.




**Connected workflow**

Representative view

**Completion**
Labour + parts

**Review**
Invoice-ready

**Xero**
Synced + sent

**Payment**
Paid + dated

1. Completed job with chargeable labour and parts
2. Administrative review before invoice generation
3. Invoice sync state and Xero reference
4. Paid status reflected against the job and customer

## Recommended evidence-building sequence

**Phase 1 - Audit**

Select recent completed jobs and map every delay, clarification, invoice correction and sync exception.

**Phase 2 - Controlled cohort**

Process a defined job group through one completion and accounting standard.

**Phase 3 - Verified result**

Report cycle time, correction, unsynchronised and payment reconciliation measures.

**Build the publishable proof layer**

Replace representative views with dated interface screenshots, a defined baseline, system-derived measures and an approved participant quotation.

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Publication note: capability descriptions are based on the Corexa repository supplied in July 2026. Confirm the deployed workflow, permissions, integrations and data quality before presenting a capability as a completed customer outcome.