

CASE STUDIES

Granite Tech

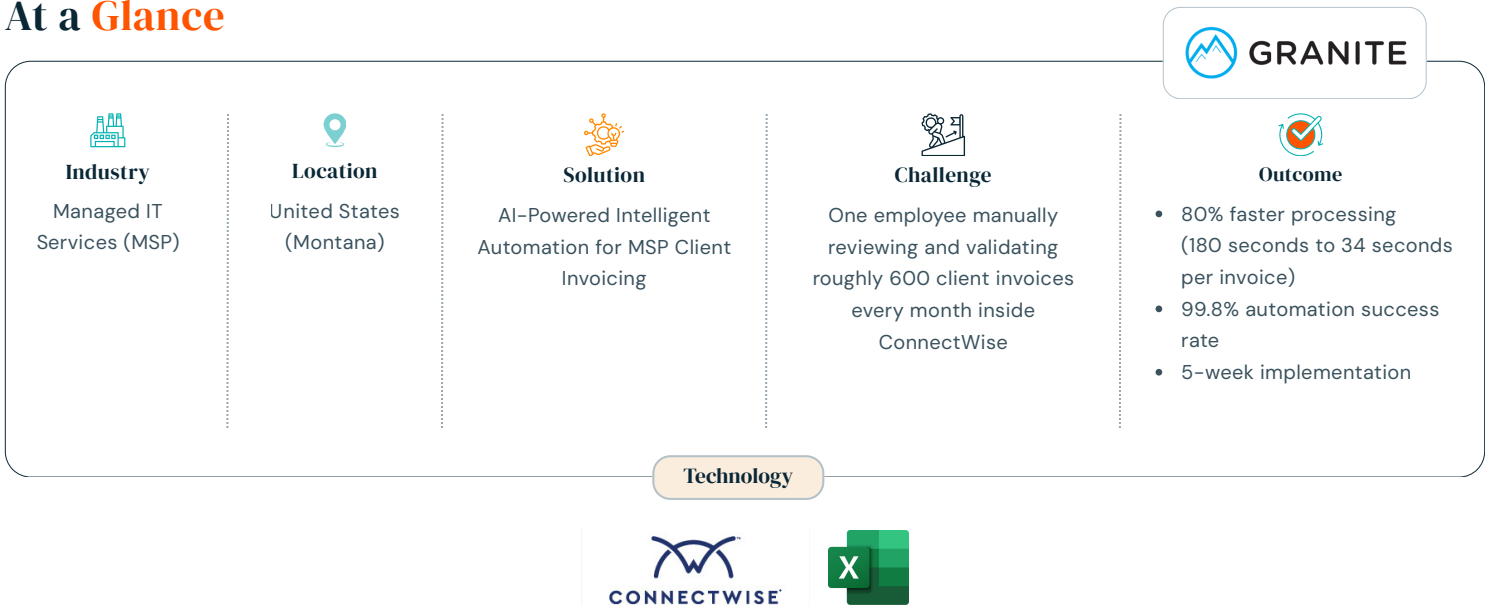
How a Managed Service Provider Automated Client Invoicing to Free Up Time for Higher-Value Work

80% Reduction in Invoice Processing Time

More Than 30 Hours Saved Every Month



At a Glance



About Granite Tech

Granite Tech is a US-based managed service provider (MSP) delivering IT, voice, and cybersecurity solutions to businesses across its region. Like most MSPs, its business model depends on recurring, accurate billing across a growing base of client accounts, and every invoice that goes out reflects directly on the client relationship behind it.

Every month, Granite Tech processes approximately 600 client invoices through ConnectWise, its billing and service platform. Before automation, that meant one employee manually opening each invoice, checking it against the client's previous month's value, and deciding whether it could be issued or needed a closer look, a process that had to scale with Granite Tech's client base rather than with the size of its team.

The Challenge

Granite's invoicing followed a defined rule: if a client's invoice value fell within plus or minus USD 10 of that same client's invoice from the previous month, and the value was not zero, it could be issued. If either condition failed, someone had to dig in manually to figure out why.

The rule itself was simple. Applying it consistently, roughly 600 times a month, every month, across Granite's full client roster, was not. One employee had to log into ConnectWise, pull up the current and prior invoice for each client, compare the values by hand, confirm the invoice wasn't zero, and only then issue it or flag it. At three to five minutes per invoice, that was a meaningful, recurring chunk of time that scaled with every new client Granite brought on, not with the size of the team doing the work.

Pain points:

- Daily manual review inside ConnectWise, client invoice by client invoice
- ~600 client invoices per month, each requiring the same multi-step check
- 3-5 minutes of manual work per invoice, adding up as the client base grew
- Process depended on a single employee's time and availability, a growth constraint as much as a time cost

Our Approach

Granite chose this process deliberately, over other candidates, specifically because it was simple and self-contained, a way to get a first automation in place and see what was involved before tackling anything more complex. Valenta and the Granite team worked through the build in frequent working sessions, reviewing the business rules and validating edge cases against real invoice scenarios before anything touched live client billing.

Process Discovery

Valenta mapped Granite Tech's exact invoicing rule (the $\pm$ USD 10 tolerance, the non-zero requirement, and how exceptions were currently being handled) directly against the ConnectWise workflow the team used every day.

Automation Build

Valenta built a Digital Assistant that logs into ConnectWise, retrieves each client invoice, and pulls the prior month's invoice for the same client, replicating the exact manual steps the employee had followed by hand.

Validation and Delivery

Every rule and edge case was tested against real invoice scenarios before go-live, so the automation's decisions matched what a trained employee would have made.

"Valenta's attention to our process and the logic behind it made us evaluate not only our process but set it up well for the Digital Assistant."

Dacia Johnson
Senior Finance Manager, Granite Tech

Our Solution

Valenta's Digital Assistant replicates Granite Tech's manual invoicing process end to end, applying the same rules consistently across every client transaction.

Automated ConnectWise Retrieval

The automation logs into ConnectWise, navigates to the invoicing area, and pulls both the current invoice and the prior month's invoice for the same client without manual searching.

Rule-Based Validation

Each client invoice is checked against Granite Tech's own tolerance logic (within $\pm$ USD 10 of the prior month, and not a zero-dollar value) exactly as the manual process required.

Automatic Invoice Issuance

Client invoices that pass validation are issued directly, with no manual entry or review needed.

Exception Reporting, With Context

Invoices that fall outside the rule aren't just flagged, the report explains why the value changed, so the team can tell at a glance whether a client simply added a line item or something needs a closer look.

Business Impact

- 80% Faster Processing
- 99.8% Automation Success Rate
- ~600 Client Invoices Processed Monthly
- 30+ Hours Saved Monthly



"I've taken a dull, repetitive task off the plate of my assistant. He doesn't have to do data entry anymore. He can spend time talking to customers, solving much bigger problems."

Dacia Johnson
Senior Finance Manager, Granite Tech



Faster Client Billing.

Manual processing time dropped from approximately 3-5 minutes to 34 seconds per invoice, an 80% reduction, while still applying every required validation before a client is billed.



Time Redirected to Higher-Value Work.

The real impact wasn't client-facing billing speed, it was what the freed-up time made possible internally.



Faster Exception Handling.

Invoices that need a closer look now come with the reason already attached, turning what used to be manual investigation into a quick check.



Room to Grow Without Growing Back-Office Headcount.

Because the process now scales with invoice volume rather than employee hours, Granite can take on more clients without proportionally growing its billing team.

Ready to Automate Your MSP's Invoicing?

If your billing team is still manually checking every client invoice against the same rule every month, that's exactly the kind of repetitive, rule-based work Intelligent Automation is built for. Start with a Complimentary Automation Assessment to see where the time is going and what's worth automating first.

Scan to Book Your Complimentary Automation Assessment →



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