

Case Study

Automating Contract & Expense Workflows for KGI



01 Project Overview



Project Overview

KGI Ventures is a real estate investment and development company managing multiple projects across buying, selling, and construction operations. Their growing scale brought challenges in tracking contract statuses, syncing data between tools, and maintaining transparency across teams. To resolve this, we implemented a unified workflow system using Monday.com, DocuSign, and QuickBooks, enhanced with OCR for contract automation.

02 Problems

Problems

01

Signed contracts were stored as PDFs without extracted data

02

Expenses were scattered and inconsistently categorized in Quickbook

03

Project creation on Monday required manual setup.

04

Departments lacked visibility into project progress.

03 Solutions

Master Board

01

A central Master Board in Monday.com was created to serve as the single source of truth for all projects. Data is automatically mirrored into stage-specific boards such as “Under Review,” “In Progress,” and “Closed Deals,” allowing each department to focus only on the items relevant to their stage while maintaining system-wide synchronization.

The screenshot displays the Monday.com interface for a workspace named 'KGI MASTER'. The main view is a table titled 'Properties' with columns for Property, Expenses, General Exp..., Total Expense, Net Profit, KGI BUYING..., and Stage of Tra. The table contains 15 rows of data, including property addresses, associated expenses, and profit/loss figures. The interface includes a sidebar with navigation options like 'Home', 'My work', and 'Favorites', and a top navigation bar with standard browser and application controls.

Property	Expenses	General Exp...	Total Expense	Net Profit	KGI BUYING...	Stage of Tra
2639 Goble St, Gastoni...	Thomas B... +2	\$6,769.1	256,769.1	-6,769.1	-	
19901 Burton Ln	Next Doo... +5	\$3,724.95	3,724.95	-3,724.95	-	
00 Goble St - Lot 4	Zelle Rec... +6	\$5,465.89	5,465.89	-5,465.89	-	
2641 Goble St, Gastoni...	Zelle Rec... +2	\$5,000.01	280,000.01	-5,000.01	2641 Goble St,...	A/B Clos
2645 Goble St, Gastoni...	-	-	275,000	0	2645 Goble St...	A/B Clos
XX Goble St - Lot 5, Ga...	-	-	0	0	XX Goble St - ...	A/B Clos
226 Oak Cir, Newton, NC	-	-	34,500	-35,744.46	226 Oak Cir, N...	A/B Clos
1760 Northgate	BSI Finan... +1	\$4,352.16	4,352.16	-4,352.16	-	
203 Williams St.	SELENE F... +9	\$14,620.67	14,620.67	-14,620.67	-	
110 Anchura Rd	BSI Finan... +1	\$11,202.42	11,202.42	-11,202.42	-	
Test Property	Test Expense	-	0	0	Test Property	New
309-315 Toddville Rd.	-	-	0	0	-	
Forest Dr.	-	-	0	0	-	
7315 Wood Duck Ct.	-	-	0	0	-	
0 Glen Manor Ct.	-	-	0	0	-	
Wilderness Ln.	-	-	0	0	-	
4418 Hubbard Rd.	-	-	0	0	-	

Expense Board

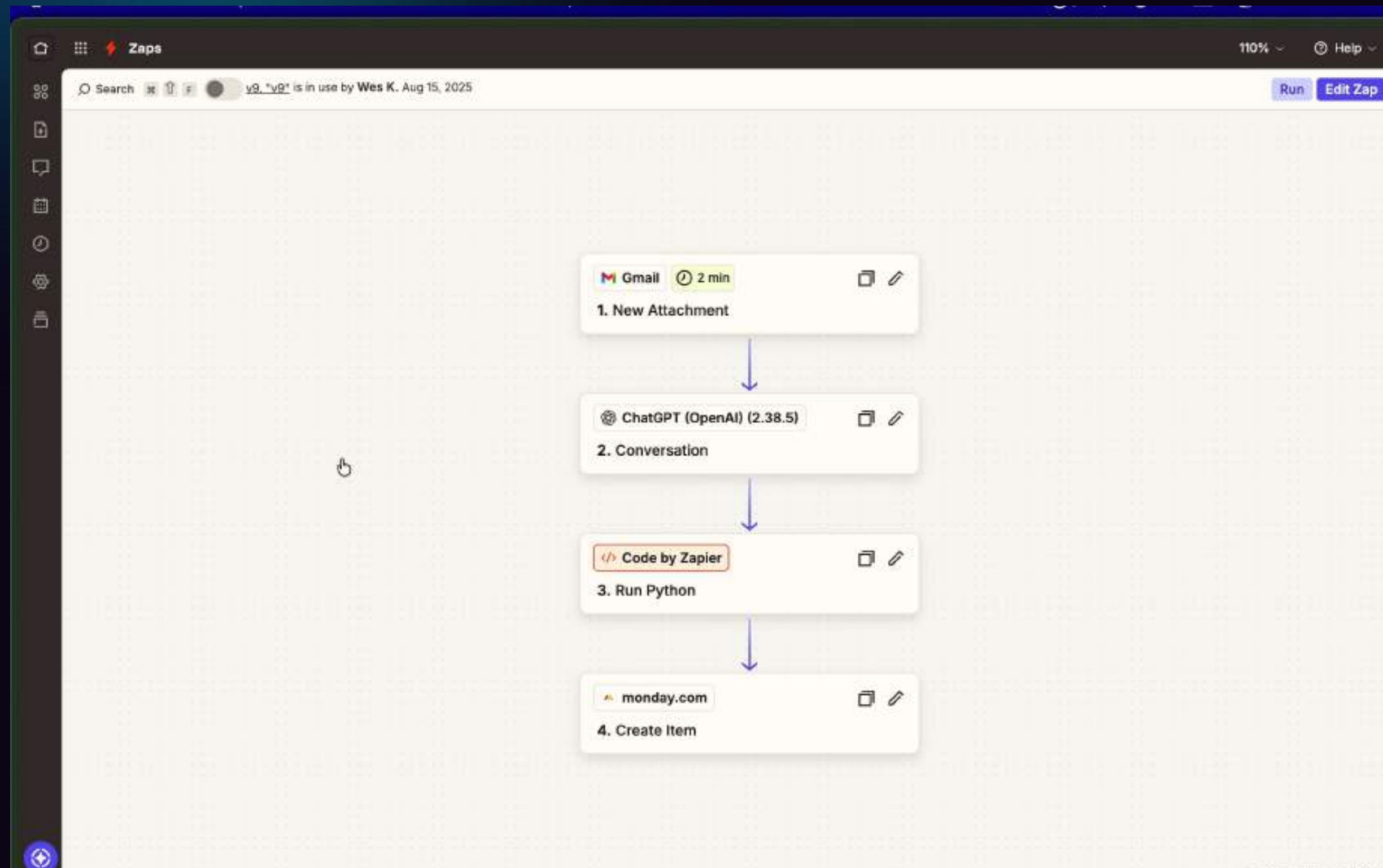
The screenshot shows the Monday.com interface with the 'Expenses' board selected. The board is set to 'By Property' view. The table displays expense data for 'This month' and 'Last month'. The 'This month' section includes entries for Jennifer Svienty, Sara Mazariegos, SELENE Finance, City of Statesville, Cary Truett, Keep Going Investments, Thomas Bush, and another Thomas Bush. The 'Last month' section includes entries for Piedmont Natural Gas, Liberty Mutual, and Town of Fort Mill. The table columns are Expense, KGI MASTER, Category, Type, Date, and Amc.

Expense	KGI MASTER	Category	Type	Date	Amc
Jennifer Svienty	Dogwood Pl	Appraisals	Cash	Oct 15	\$3!
Sara Mazariegos	1807 Lela Ave	Cleaning	Cash	Oct 14	\$5!
SELENE Finance	225 Butterfiel...	Mortgage Payments	Cash	Oct 9	\$1,61
City of Statesville	225 Butterfiel...	Carrying Costs	Cash	Oct 7	\$4
Cary Truett	19901 Burton Ln	Interest Paid	Cash	Oct 2	\$1,6
Keep Going Investments	203 Williams St.	Interest Paid	Cash	Oct 1	\$1,95
Thomas Bush	2641 Goble St ...	Interest Paid	Cash	Oct 1	\$1,66
Thomas Bush	Goble St - Lot 4	Interest Paid	Cash	Oct 1	\$1,66
Thomas Bush	2645 Goble St...	Interest Paid, Interest Paid	Cash	Oct 1	\$3,33
+ Add expense					
					\$12,75
Expense	KGI MASTER	Category	Type	Date	Amc
Piedmont Natural Gas	19532 Weaver...	Gas	Cash	Sep 30	\$12
Liberty Mutual	2641 Goble St ...	Insurance	CreditCard	Sep 30	\$115
Town of Fort Mill	104 Shamrock ...	Carrying Costs	Cash	Sep 29	\$1!

02

Any new expense in QuickBooks, triggers the automation & sends structured data into the linked Expenses Board in Monday. Each entry is categorized by ID and automatically rolled up into financial dashboards. This integration provides real time expense visibility for projects

Contracts OCR to Monday Item



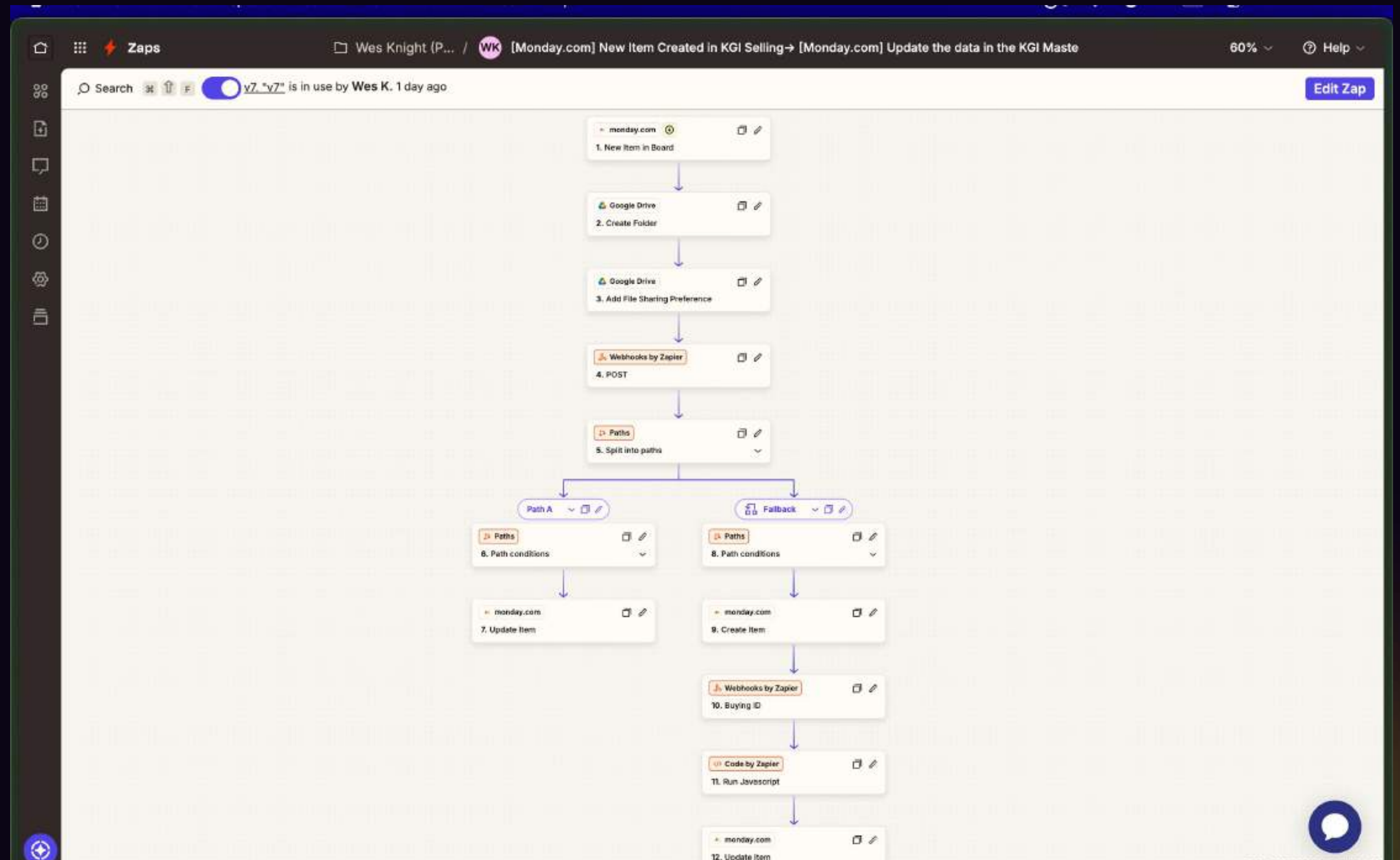
03

When a contract being signed in DocuSign, the system retrieves the PDF, runs it through an OCR parser, extracts critical fields like property name, agreement date, contract value, and client details, and auto-generates a new project item in Monday.

Sync Between Master and Selling

04

The automation ecosystem connects DocuSign, OCR, Monday.com, and QuickBooks in a single logic chain. When a contract is signed, data flows into Monday, triggering automations that assign stages, notify team, and prepare expense tracking links. QuickBooks syncs ongoing cost data back into Monday for unified reporting.



04 Conclusion



Conclusion

By implementing OCR-based automation and cross-tool synchronization, KGI Ventures transformed its project lifecycle from manual tracking to a streamlined, data-driven workflow. Every signed contract now generates a new project instantly, expenses are automatically organized, and all departments share a unified dashboard view — making KGI's real estate operations faster, more accurate, and fully scalable.

Thank You