

Customer Success Story



Overview

Industry: Industrial Equipment

Customer Profile

Founded in 1978, ProLift Industrial Equipment is a material handling resource for forklift and aerial equipment.

Located in Kentucky, Indiana, Ohio and West Virginia, ProLift is a President's Award dealership for Toyota, and customers count on their expertise for:

- New & Pre-Owned Equipment
- Short & Long-Term Rentals
- Parts & Service Support
- Storage & Handling Solutions
- Operator & Trainer Safety Programs

proliftequipment.com



Industrial Equipment Company Reduces Invoice Processing Time by Nearly 50% and Saves \$125,000 During First Year with Automation

"I use it all day and love it. TrinDocs is as cool as running water!" - Dan McFadden, Operations

"Visibility, visibility, visibility! TrinDocs provides immediate visibility throughout our entire organization. This generates incredible value." - Doug Simcox, CFO

Situation

ProLift, an industrial equipment dealer with multiple locations throughout the South and Midwest, experienced an increased volume of payable invoices from their largest vendor, Toyota. Their total AP invoices went from 400 to 1200 a week, a 300% increase in a very short time. Processing invoices that arrived via e-mail with attached PDFs put a large strain on staff. ProLift asked the TrinSoft team for a solution that could handle these invoices with virtually no data entry and automatically insert them in their ERP software.

Solution

TrinSoft collaborated with ProLift to implement a solution using TrinDocs, which has a feature called InboundAutomation that was designed for their situation. InboundAutomation automatically processes the incoming Toyota e-mailed invoices, reads data from the PDF and inserts the data into their ERP solution. TrinDocs also handles many details behind the scenes such as finding matching receipt lines and validating totals and freight.

Old Process

1. Invoice is received via email from Toyota.
 2. Employee monitors email inbox for new e-mails from Toyota.
 3. Employee opens attached PDF.
 4. Employee prints PDF.
 5. Employee retrieves PO and receipt lines from ERP system.
 6. Employee matches receipt lines to invoice.
 7. Employee keys invoice into ERP system.
 8. Employee files paper copy in filing cabinet.
- (ProLift learned that every location was also printing and filing paper copies of invoices.)

Today

1. TrinDocs automatically monitors and processes inbound emailed invoices.
 2. Employee validates invoice data in TrinDocs, clicks approve.
- (Everyone has immediate access to search and retrieve invoices based on permissions.)

Return on Investment (ROI)

After implementing TrinDocs, ProLift cut the time it takes to process a Toyota invoice by nearly 50% and saved \$125,000 during the first year with automation. In addition to reduced processing time, ProLift also realized these added benefits:

- Achieved 100% paperless processing
- Eliminated storage boxes and reclaimed office space previously used for storage
- Improved the quality, reduced errors, decreased the store error processing time
- Eliminated the manual sorting process
- Checks are printed 2 times per week vs. 1 time, improving vendor relationships
- Check-to-mail time has been reduced from 7 days to 1 day
- Visibility to transaction support and answering inquiries is significantly easier

For more information, go to trindocs.com, call (859) 252-6225 or e-mail info@trindocs.com.