



Client Success Story

Yooz Turns CSM Truck's AP Process into Rolling Thunder

"Yooz enabled our operational teams, previously burdened by administrative tasks, to concentrate more on our core competency: serving our customers. This is benefiting our entire business overall."

Ben Sager, Corporate Controller at CSM Companies



Industry: Trucking
Location: Madison, WI
Employees: 1,000 - 1,100
Invoices: 8,000/month
ERP: Karmak

CSM Truck, a multi-state truck dealership group since 1978, operates 24 U.S. locations specializing in medium and heavy-duty commercial vehicle sales, parts, services, and truck leasing and rentals with a focus on the Kenworth brand.

As a subsidiary of CSM Companies, a top Kenworth dealer in North America and three-time Kenworth Dealer of the Year, CSM Truck embraces the same people-first approach that has led CSM Companies to significant growth and over a billion dollars in annual revenue across all divisions.

Previous Pain Points

Paper heavy invoicing & manual data entry



Physical document storage & inefficient access



Time-consuming invoice processing



Multiple, conflicting business systems



No accounts payable platform scalability



The Yooz Solution

Multi-channel electronic invoice scanning with AI-powered recognition and verification.

Centralized, cloud-based data storage with 24/7 remote access from anywhere.

Unlimited customizable workflows with tailored approval levels.

Single invoice system with seamless ERP integration and Unified Chart of Accounts.

Highly flexible workflow with unlimited users and locations.

The Challenge

CSM Companies' old invoice processing system was highly manual and inefficient, creating numerous challenges. Approximately 8,000 non-OEM invoices a month were received at the local branch level and sent electronically to the Accounts Payable (AP) team, where they would be manually entered and information keyed directly into the ERP. The invoices would then be stored both digitally and physically, leading to space issues and an increased risk of document loss.

This situation was further complicated due to remote workers, with illness and connectivity problems placing additional stress on the existing process. When multiple acquisitions and conflicting business systems further complicated issues, the company knew something had to be done. Once the branches moved to a single unified platform – Karmak – Ben Sager, CSM Truck's Corporate Controller, began the search for a unified software solution particularly to handle the non-OEM invoices more efficiently.

"I really appreciate that each user can customize and filter their view based on their own preference and needs. These tools allow our team to efficiently divide and prioritize workload."

Julie Williams, Accounts Payable Specialist at CSM Companies

"We're able to cut our time from when we get the invoice payment ready down from about 10 business days to only 3-4 days."

Ben Sager, Corporate Controller at CSM Companies

✓ The Solution

Sager sought a solution that would put the AP department at the front end of the process and allow the company to easily scale. Yooz stood out as a highly flexible, complete cloud-based AP automation solution that excelled at leveraging the unique combination of OCR and AI/ML technology. An existing seamless integration with Karmak, the procure-to-pay capability, scalability, and user-friendliness all contributed to the final decision to move forward together with Yooz.

Sager decided on a phased approach, with an operational team implementing the new streamlined process in each store one-by-one. This greatly supported employee buy-in and a company-wide mindset change. Yooz was there at every step, with Sager stating that *"the support we received post-contract-signing was just phenomenal."*

The Impact

The implementation of Yooz software marked a significant transformation in CSM Truck's AP process. Vendors are now able to submit their invoices electronically directly into Yooz, where Yooz's AI technology handles data input and processing. This minimizes the need for initial processing and document storage at the branch offices.

Furthermore, Yooz's AP-focused solution integrates procurement to payment, offering a comprehensive workflow that was previously unavailable in CSM Truck's business system. This integration extends beyond simply AP automation, such as enabling purchase order creation and payment approvals, supporting CSM Truck's long-term potential needs.

The result? CSM Trucks now enjoys enhanced efficiency and visibility in their AP process, with fewer vendor inquiries, improved response times, and a streamlined AP cycle.

These improvements drive significant ongoing efficiency gains and provide ample room for future growth.