



USE CASE

Invoicing & Billing

A Canadian fuel supplier and distribution company that also operates a chain of retail convenience centers turned to TrueContext for assistance with challenges in invoicing and billing for different types of operating assets.



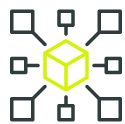
- ✓ More efficient field operations
- ✓ Improved back-office operation
- ✓ Faster invoicing
- ✓ Reduced errors
- ✓ Increase technician engagement
- ✓ Improved CSAT

RELIANCE ON MANUAL SYSTEMS

The company used a manual system for its inspections and customer billing processes. The volume of paperwork technicians generated was huge and needed to be invoiced and re-entered. The process was highly inefficient, resulting in lost time and increased costs.

DELAYS IN INVOICING

Due to the manual process and physical handover of information, the time from inspection to invoicing was much longer than necessary. Further delays were present if disputes arose as a result of late filing, missing paperwork, or inaccurate record keeping.



The challenge

REMOTE LOCATIONS

With multiple remote sites where hundreds of drivers, technicians, and supervisors work in the field, it was difficult to standardize forms and workflows to efficiently collect data and provide access to support and documentation at any point in time from anywhere.

LACKED QUALITY DATA AND REPORTS

Paper-based forms made it difficult to capture information for accurate billing. It was impossible to verify whether the work performed was correct. The lack of quality data and delays in receiving information from the field resulted in stale and ineffective reporting, preventing the management team from making timely decisions.



TrueContext has been great to work with. We're able to get answers when we have questions in a speedy fashion to allow us to continue to move forward so we're not stalled on anything.

BUSINESS PROCESS IMPROVEMENT MANAGER
FUEL SUPPLIER AND DISTRIBUTION COMPANY

Outcomes

▶ EFFICIENT FIELD OPERATION

Techs can do more inspections in less time. Tasks have become more simplified since they only have one form to complete. Technicians are now empowered to order parts via the mobile app, generate quotes, and sign sales agreements without multiple visits between the field and office. This has sped up the sales-inspection-invoice-payment process considerably.

▶ IMPROVED BACK-OFFICE OPERATION

The admin team no longer must spend time scanning documents and saving PDFs into business systems. Forms have been digitized, complete with all the required details, pictures, signatures, and approvals, making it easy to find information.

▶ FASTER INVOICING

TrueContext has helped the company's services team take ownership of the invoicing process by bringing it to the field. Technicians can now use their mobile devices to capture information via easy-to-use forms, and an invoice can be sent as soon as the work is done.

▶ REDUCED ERRORS

With its built-in business logic and evidence-based workflow, TrueContext makes it easier for technicians to complete work and create error-free invoices. Data integrity challenges are resolved, reducing rework, and making inspection and invoicing easier than ever.

▶ RAPID RESPONSE

Citizen developers are now empowered to build and revise forms without the IT department's involvement in as little as 30 minutes.

▶ INCREASED TECHNICIAN ENGAGEMENT

Field technicians are pleased to no longer must carry paperwork back and for into the office each day. Their work is made considerably easier because of TrueContext.

▶ IMPROVED CSAT

Improved field visibility, data collection, technician empowerment, and customer transparency have meant improved customer service for the company. Additionally, the reduction in wait time for quotes, invoices, and sales agreements means customers are served faster, building trust and increasing satisfaction.



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