

Jackson Group Peterbilt Fuels AP Efficiency with Yooz



Industry: Trucking

Location: Salt Lake City, Utah

Employees: 2,500+

Invoices: 23,000/month

ERP: CDK

"Partnering with Yooz wasn't just about automation—it was about solving our biggest problem. We no longer have to scramble to get our invoices approved and paid."

Bryan Coats, Chief Finance Officer

⊗ Previous Pain Points

Paper heavy invoicing & manual data entry

Time-consuming invoice processing

Document storage & access

Inefficient tracking system

✓ The Yooz Solution

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

Unlimited customizable workflows with tailored approval levels.

Cloud-based 24/7 remote access from any mobile connection.

Highly flexible workflow with realtime and audit-ready traceability.

Jackson Group Peterbilt delivers premium, custom-built Class 6–8 trucks tailored to the unique needs of fleet owners and operators. Known for durability, comfort, and performance, each truck features advanced components such as lightweight aluminum cabs and robust frame systems. Backed by Peterbilt's industry-leading dealer network and TruckCare services - including 24/7 roadside assistance and fleet maintenance - Jackson Group Peterbilt ensures long-lasting value and driver satisfaction.

With a commitment to quality and innovation, they continue to lead the way in meeting the demands of diverse industries across North America.

⊗ The Challenge

Before implementing Yooz, Jackson Group Peterbilt faced multiple accounts payable challenges. Their process depended on paper invoices, manual data entry, and inefficient communication, which caused delayed payments despite sufficient cash flow.

"We were receiving 20,000 invoices a month, and it was a mess. We couldn't keep track of where they all were, [...] My team would forget to pay some, and vendors were frustrated, even though we had the cash to pay our bills."

Bryan Coats, Chief Finance Officer

"The volume was overwhelming. Everything was done by hand, which made the process extremely slow. We also had constant back-and-forth just to get approvals."

Stephanie Wimmer, AP Manager

✓ The Solution

Jackson Group Peterbilt selected Yooz to address persistent inefficiencies in their accounts payable process. The objective? To streamline workflows, gain real-time visibility, and eliminate manual tasks that slowed down operations. Yooz stood out for its ability to automate the invoice approval process while fostering accountability across teams. The platform's intuitive interface and transparency made it easy to assign ownership at every stage, eliminating confusion over responsibilities.

By automating routine tasks and reducing reliance on manual workflows, Yooz helped the company resolve long-standing challenges, improve efficiency, and gain tighter control over their AP operations.

"We've reduced our paper usage by tons. It's like we saved a whole forest in just one year!"

"No more waiting for people to code things on paper and email them to you or take them over to your desk. Yooz really made everything faster and more efficient."

Stephanie Wimmer, AP Manager



The Impact

The impact of Yooz was both immediate and measurable. Jackson Group Peterbilt reduced its AP team from 12 to 8 employees, even as the company expanded from 800 to 1,000 employees. Automation eliminated the need for overtime and external assistance, enabling the team to handle more work efficiently.

According to CFO Bryan Coats, *"We can now do more with fewer people."* He also noted that the reduction in paper and administrative tasks significantly improved the bottom line.

With invoices now processed on time and tracked throughout the workflow, the company has eliminated common bottlenecks and strengthened relationships with vendors.

As AP Manager Stephanie Wimmer noted, *"Everything is tracked and we always know where every invoice is. Nothing gets lost or delayed."*