

Transwest Group Reaching a Mile-High Accounts Payable Automation



Industry: Automotive
Location: Denver, CO
Locations: 5
Invoices: 2,100/month
ERP: CDK Global

"It was such a relief to find a complete solution that would accommodate the entire process, from purchase to payment, without any nickel-and-dimeing or added costs for bolted on software."

Jason Kleve, Controller

⊗ Previous Pain Points

Document storage & inefficient access

Time-consuming invoice management

Audit-related obstacles

Lack of managerial accountability

✔ The Yooz Solution

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

Unlimited customizable workflows with tailored approval levels.

Comprehensive, easy-access audit trails

Faster response to requests, fewer e-mails to manage, less time spent tracking down approvers

Transwest is headquartered in Denver, Colorado and represents a diverse group of operations providing transportation products and services to commercial and retail customers across the U.S. and Canada. Its dealership operations represent the Freightliner, Western Star, and Isuzu, GMC and Buick brands. The goal at Transwest is to get you on the road and keep you there, whether you are a long-haul trucker or just looking for a great deal on a new car or SUV.

The company first implemented the Yooz AP automation solution in its five auto retail stores where a centralized (AP) department for that group processes more than 2,100 documents/month.

⊗ The Challenge

The Transwest auto dealership division of the company had been wanting to go paperless for the past five years, however, there were not many platforms that would integrate seamlessly with its CDK DMS system for a complete end-to-end P2P (purchase-to-pay) solution... until Yooz.

Much of the AP department's office space was wasted on file cabinets, and during the audit process it was difficult to find documents. The catalyst to making the transition to AP automation came when the group decided to build a new campus and they did not want to move all those file cabinets.

"Storing documents in the cloud has solved most of our pain points. Documents are easily accessible by all department managers. It's much more secure. And we're saving money and time by not shredding, storing, or shipping documents."

Jason Kleve, Controller

✓ The Solution

CDK recommended Yooz, and the management team at Transwest was thrilled to have finally found a solution that housed the entire P2P process, and at a very reasonable cost.

"With other options there was one base service, like data storage for example, and then the provider had to bolt on other softwares," lamented Jason Kleve, Transwest's controller. "Each additional software came with its own licenses, implementations, and additional costs. We almost gave up that we could find a complete solution."

"This change has forced managers to be more involved and accountable. Our tech savvy personnel adapted very quickly. But even the old schoolers became our biggest advocates once they realized the benefits from the improved processes."

Jason Kleve, Controller



The Impact

The company rolled out the implementation at the corporate branch first, learning and troubleshooting along the way.

Only three months later as the AP team asked *"How soon can we get rid of paper copies?"* implementation at the other four stores began. The entire implementation period was only six months.

"This change has forced managers to be more involved and accountable. Our tech savvy personnel adapted very quickly. But even the old schoolers became our biggest advocates once they realized the benefits from the improved processes." said Kleve.



Find out more about our
integration with CDK



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832 384 9669

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