



Case Study: Automating invoice management for logistics operations through trip & indent data integration

The customer is a leading logistics tech firm in India providing digital freight solutions to shippers, transporters, and logistics service providers. They operate at scale across multiple industries and manage high volumes of trips and indents every month.

Business Scenario

The customer needed a robust digital solution to replace manual invoice calculations done in Excel, which were time-consuming and error-prone. They wanted a system to automate revenue computation across trips, streamline billing, and integrate outputs seamlessly with their finance processes.

Challenges

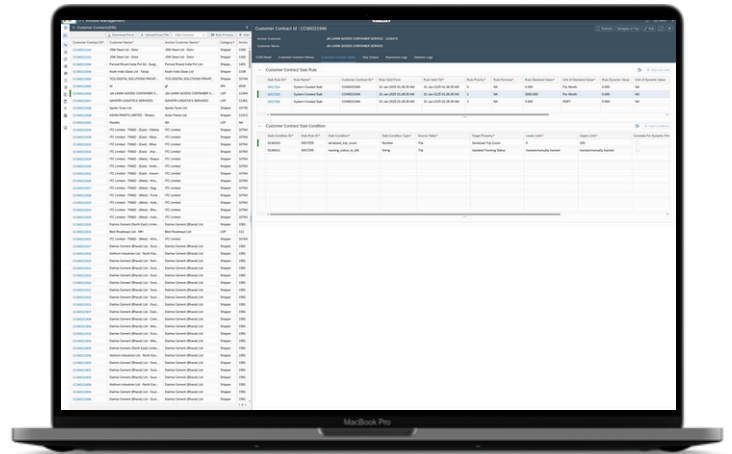
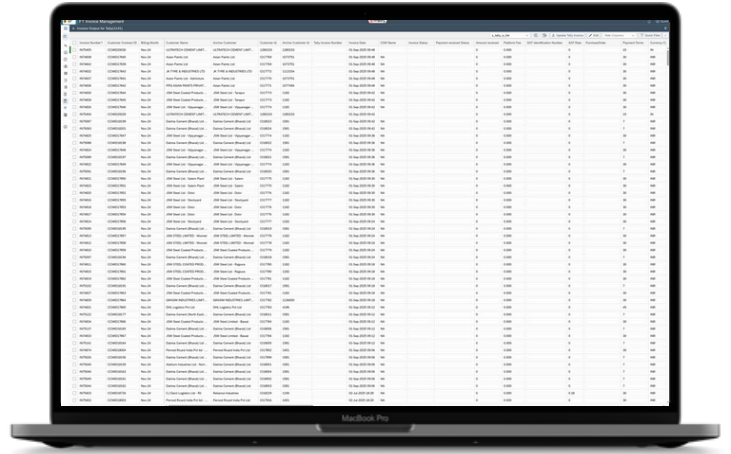
- Invoice processing took **20+ days** involving multiple teams
- **Manual errors** and **reconciliation delays** were frequent
- **No real-time visibility** across trip and indent data
- **Scattered Excel** files made tracking difficult
- High **risk of revenue leakage** due to human oversight
- **Dependency on non-integrated tools** slowed down finance workflows

Solution

Procify designed and deployed a fully automated Invoice Management System (IMS) using our AI-powered low-code platform, that streamlined trip and indent-level revenue calculation. The system integrates seamlessly via AWS S3 for data exchange, applies customer contract rules for precise billing, and generates validated outputs for Tally integration. It also enables recalculation, pivot-based analysis and secure management of customer and contract data.

Solution Components

- **Invoice Management System (IMS)**
Trip and indent-based revenue calculation with contract rules for consistent processing.
- **Validated output for finance integration**
Validated billing output for Tally and finance systems.
- **Seamless data exchange via AWS S3**
Ensures real-time trip/indent data exchange for consistent processing.
- **Pivot-based analytics & audit trail**
Enables transparent reporting, revenue visibility, and compliance-ready audit history.
- **Built-in Master Data Management**
Auto-syncs contract and customer master data, reducing dependency on external files or emails.
- **Tightly integrated with financial systems**
Pushes final invoice values back into financial systems for downstream accounting and reconciliation.



Benefits

- Invoice time reduced from **20 days to 1-2 days**.
- **100% accuracy** in billing by eliminating manual errors
- **Faster monetization** of receivables with accelerated invoice processing
- Foundation for **automation** and future analytics
- Stronger **audit readiness** and financial governance



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