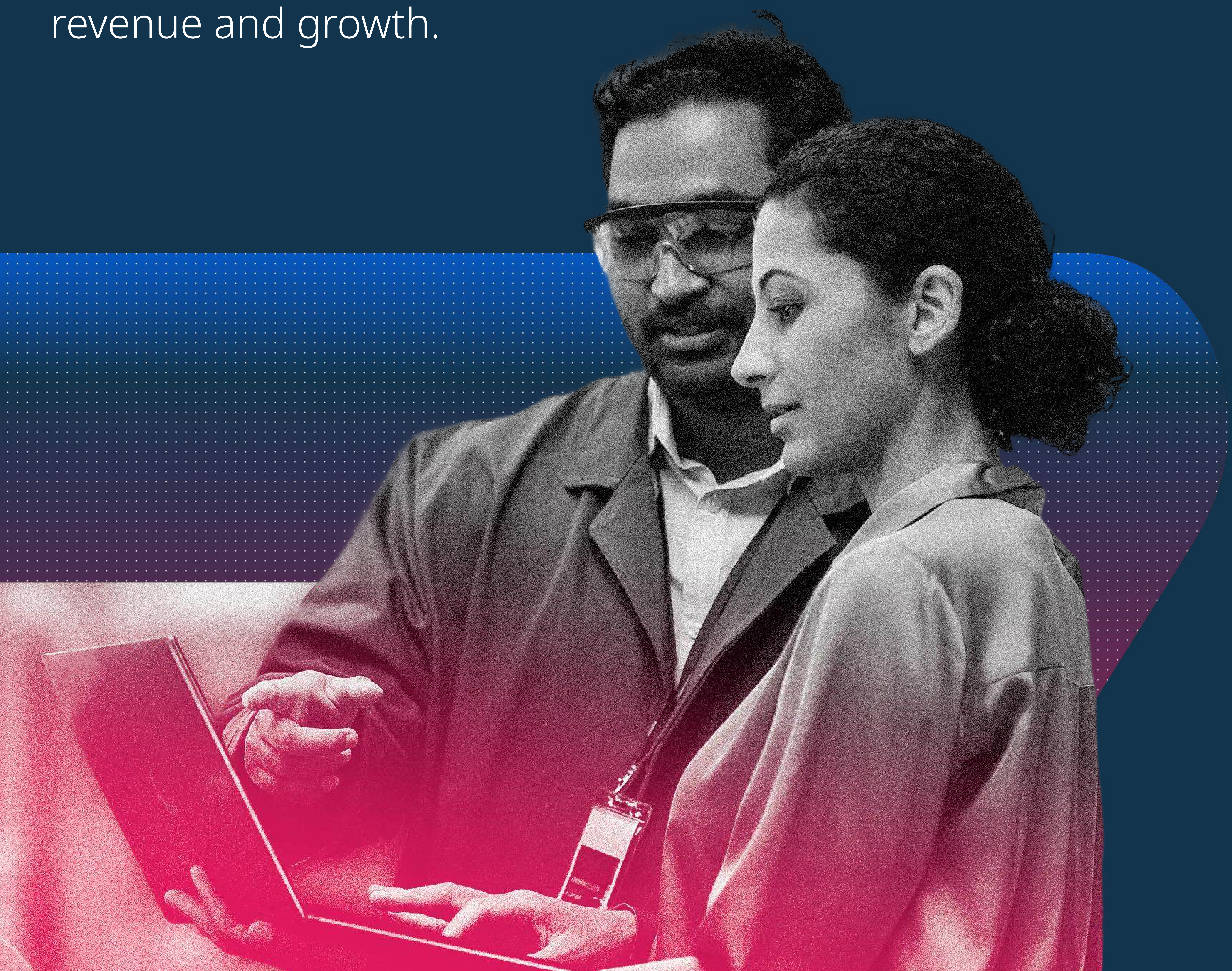
Accelerate Dealership Profitability: Your DMS + Back-Office Automation

Here's how Lean Financial Operations™ lets you transform your DMS into an engine for efficiency, revenue and growth.



Your DMS wasn't built for profit. It's time to change that.

Your DMS touches nearly every aspect of your business, but it was built to operate the dealership, not maximize financial performance. And that's costing you your edge. Your finance team is probably correcting the same errors, re-keying invoices, and chasing missing data every month. Worse, your DMS leaves you without a clear picture of your finances when you need it: now.

If you have a DMS but are still juggling manual and paper-heavy processes within your dealership, you're missing out on a significant financial advantage.

Strategic finance leaders are looking for ways to lean out their financial operations to reduce friction and waste, grow faster, and transform their AP function into a seamless operation that connects data silos and enables more visibility and control for finance leaders and general managers.

Adopting the model of Lean Financial Operations, which uses automation to fight waste, risk, fraud, and errors, allows you to boost your DMS's capabilities to reduce financial complexity, enhance control, and supercharge scalability. The result is true innovation that powers growth for good.

Dealerships that implement Lean Financial Operations and adopt finance automation alongside their DMS workflows can cut month-end close-by days, and reduce processing time, costs, and errors by 80% or more.

This eBook delves into the six big benefits of automating financial operations to turn your back office into a powerhouse of efficiency and innovation.

6 reasons to Implement Automation: Why Dealerships Choose Lean Financial Operations to Optimize Finances

Lean Financial Operations is a way of modernizing operations for more efficiency, better fraud prevention, and deep visibility that helps you advance your goals, whether that's adding more dealerships or maximizing every cent that walks in your door. It rests on five principles:

- **Eliminate four types of waste:** High costs, low productivity, errors, and fraud
- **Gain financial transparency:** Visualize every financial ops process end-to-end to eliminate waste
- **Streamline operations:** Create smooth, uninterrupted movement of interactions and transactions through the entire ops process
- **Perfect your processes:** Enable and measure continuous improvement
- **Total control:** Use financial ops to advance your goals and KPIs

No matter what DMS you use, these principles help you save money, optimize capital decisions, and grow quickly. They rely on automation that works with your DMS, not against it.

Here's how to implement them and why.

1

Drive down waste with specialized features

Relying on manual processes and legacy data impacts far more than the back office. It slows down Service, Parts, and Sales, creating a hotbed for costly errors, duplicate payments, and delayed reconciliation that quietly erodes dealership profit.

A modern AP automation solution enables Lean Financial Operations by amplifying the power of your DMS. It automates high-volume AP tasks while maintaining real-time synchronization with core DMS data, eliminating manual touchpoints and turning your DMS into a true financial value driver, not just a system of record.

IOFM data shows an average of **39% of all invoices contain errors**, wasting a significant amount of your team's time in identifying and rectifying issues while delaying cash-flow visibility and confidence. Advanced AP automation systems offer specialized features to reduce waste, fight fraud, and speed up reporting:

- Apply dynamic and customizable approval workflows tailored by department and spend limit
- Detect and prevent fraud better than humans can
- Enable real-time financial reporting to enable proactive cost control and improve decision making
- Use AI to capture data and apply the right GL code to any vendor invoice

2

Adapt your DMS to your business, faster

Even the most powerful DMS systems can force a dealership to abandon established processes and adapt to rigid "best practices" set by the software. This friction slows adoption and delays getting ROI on your DMS investment.

Specialized AP automation tools can act as a bridge between how your dealership and DMS operate. By layering a highly configurable AP solution onto your DMS, you gain the ability to tailor workflows that meet the way you work. Yooz's workflows can map to every department's existing processes and integrate them with your DMS structure so approvals, coding, and financial processes stay in sync.

This enhances operational efficiency and delivers faster time-to-value on your DMS.

As Kevin Barden, Accounts Payable Manager from Walser Automotive Group, notes:

"One of the things I really appreciate about Yooz is the control it gives me. I can go in and adjust workflows myself without having to wait on IT or submit a support ticket. It's user-friendly enough that I can manage changes on the fly, which makes a big difference in how responsive we can be as a department."

3

Gain compliance, control, and clarity with industry-specific workflows

Dealerships rely heavily on capital financing, which means they need to operate transparently and provide proof of controls. But it's difficult when they have many departments operating differently. Manual, paper-heavy AP processes create a critical disconnect between PRs, POs, and invoices, raising audit risks.

An automated AP system that integrates with your DMS can provide specialized, purchase-to-payment workflows that keep everything aligned. The system allows for automated three-way matching for critical inventory control and automatically generates in-depth audit trails for every transaction, satisfying internal controls and external auditors. It also enforces the controls you put in place, such as who approves which purchases.

Yooz ensures compatibility by leveraging direct API connectors for major DMS systems and supporting flat-file formats for others, helping secure your entire financial ecosystem.

"One of the things that stood out to me with Yooz was that it is AP specifically focused. Additionally, I saw great potential in Yooz's AP Automation solution beyond just automating accounts payable invoices; it could also be utilized for creating purchase orders and managing payment approvals."
– Ben Sager, Corporate Controller, CSM Truck

4

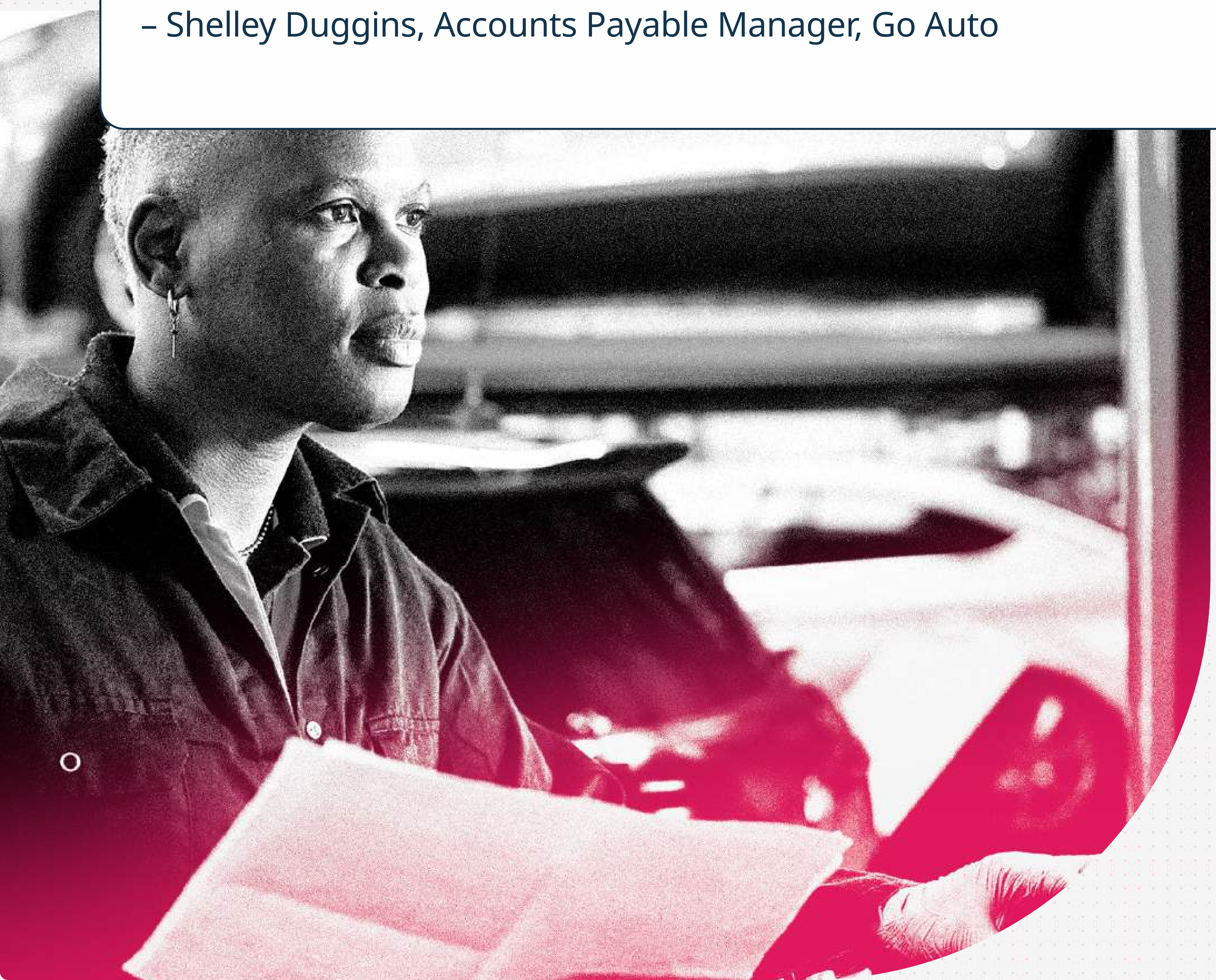
Broaden visibility and reduce costs

Dealership financial managers usually have to make decisions without the right data in their hands. When AP is manual, the rich data inside your DMS is hard to leverage, creating blind spots for the business. This limited visibility makes it hard to evaluate where the business is operating efficiently and where errors and waste are eroding your profits. That creates financial uncertainty.

A key tenet of Lean Financial Operations is establishing a single source of truth for all expenditures so you can get a clear and current view of what's going on. Yooz provides that single source. By integrating it with your DMS, you instantly gain visibility into your processes, cash flow, and bottlenecks.

With automated invoice capture and approval workflows, Yooz customers achieve up to 80% reductions in processing times. This enables AP teams to transform their function into a lean financial operation and allocate more time to strategic, value-add initiatives.

"Closing the month used to take five days, and in a business like ours that relies on immediate information, it was five days too long. Now our month-end takes a half day, we're meeting our targets, the information is correct, and we can move right into the accruals stage."
– Shelley Duggins, Accounts Payable Manager, Go Auto



5

Fight fraud faster and more effectively

Your DMS alone doesn't provide the sophisticated defense needed to combat today's advanced financial fraud attempts. Fraud tactics constantly shift, and AI-driven fraud is on the rise, leaving your dealership vulnerable to duplicate invoices, fake vendor records, and fraudulent parts invoices. With **79% of organizations reporting experiencing payment fraud attempts in 2024**, most organizations need new ways to mitigate risk.

But if you're trying to implement Lean Financial Operations, you can't endlessly stack new manual controls and prevention steps. Yooz automatically applies more sophisticated ways of catching fraud into your workflows. The system uses AI to detect subtle indicators of fraud, automated matching that's faster and more reliable than human matching, and end-to-end traceability and transparency that discourages fraud and lets you detect it before any money goes out the door.

Yooz automatically:

- Detects forged or manipulated documents
- Verifies vendor bank details to prevent wire fraud
- Enforces strict user authentication to prevent internal abuse

This eliminates the confusion that fraud feeds on, creating the safest environment for business.

6

Scale with ease

DMS complexity shouldn't delay growing your business. But it often does: Adding locations or increasing transaction volume often requires expensive, time-consuming DMS rewiring or hiring more finance staff.

But Yooz lets you scale without disruptive changes to your core DMS. The platform provides:

- Instant multi-entity support to quickly onboard new locations
- Dynamic workflow configuration to adjust approval hierarchies
- Seamless scaling for increases in invoice processing

The result is a system that keeps pace with your ambition, on your terms, with no operational limit.

Move Your DMS from **Good to Great**

Your DMS is essential to running your dealership, but it was never designed to deliver the financial accuracy, control, and visibility a modern business requires.

Yooz is the strategic layer that helps you implement Lean Financial Operations and unlock the potential in your DMS. By adding specialized AP automation to your DMS, you can **eliminate manual waste, strengthen fraud defenses, scale your business, and gain real-time visibility** that helps you make the best financial decisions.

If you want your DMS to run faster, smarter, and with fewer financial risks, the next step is simple.

See how Yooz connects seamlessly to CDK, Tekion, Dealertrack, Karmak, Procede, and more to elevate your financial operations from day one.

Want to learn more about integrating your DMS with Yooz?

Accelerate your dealership profits with Yooz and your DMS platform.

Find out more