



CASE STUDY

# Southwest International

## Full-service truck dealer rolls out modern payment portal, driving customer self-service

### Superior customer experience

through customer self-service portal with invoices and payments

**Reduced days to pay** through easy digital payment options

**Reduced manual work across AR team** through touchless payments matched to Karmak Fusion



### The Challenge

For more than 40 years, Southwest International Trucks has served North Texas as a full-service dealership, growing to more than 400 employees, five dealer locations and 2 Idealease locations. Southwest is one of the largest locally owned and operated International dealerships in the United States.

Southwest prides itself on the motto, “Three C’s: Customer, Cooperation, and Can-Do”, which strongly emphasizes customer service excellence and is why their accounting team was able to identify legacy accounts receivable processes that required modernization. The lack of a self-service online portal for invoices and payments was immediately identified as a manual process that was causing the team to lose valuable time resending copies of missing invoices and manually applying payments in Karmak Fusion. Customers were also requesting a modern business portal that would offer multiple options for setting up payments and access to invoices.

Collections and AR aging balances were also identified as an area that could benefit from a modern collections system. The AR team had difficulty tracking aging balances for collections, and many times these balances would be written off.

Finally, Southwest set a goal to provide a common platform for both dealership and leasing customers when doing business with the company.

### The Solution

Leveraging Billtrust’s extensive heavy machinery dealer experience, as well as its integration with Karmak’s Fusion platform, Southwest’s dealer management system, they began a digital transformation. The AR team implemented Billtrust’s billing portal via the standardized connector between Karmak and Southwest, enabling customers to view invoices, see their current balances and conveniently pay online.



## The Results

Southwest's staff has minimized calls and email requests for invoice resends, as well as duplicate and unapplied payments. Payments are now matched to invoices and delivered back for greater efficiency. With time saved from tasks like taking credit card payments by phone, the AR team can now focus on other value-added initiatives and projects.

Southwest team members weighed in on how Billtrust has reduced manual work and improved the customer experience:

**"I'm excited that Southwest is now delivering modern solutions that offer customers self-service invoice viewing and payment options. This provides the AR team significant time savings in their everyday duties and allows them time to focus on other areas of their job responsibilities."**

Shawn Trimble  
Vice President, Advanced Technologies and CPO (Chief People Officer)

**"Payment processing through Billtrust significantly reduces the manual portion of the cash application process. We plan to get more customers using and making payments through Billtrust."**

Bethany Dupree  
Dallas Office Manager

**"Calls requesting copies of invoices have greatly decreased."**

Jennifer Cole  
AR Administrator

**"Customers who have signed up to use the portal like it. They can get access anytime they need and are not dependent on my work hours to get invoices or schedule payments."**

Sharon Burton  
AR Administrator

**"Customers that can access their online Billtrust account don't reach out to me unless they have questions on an invoice. This gives me more time to work on other responsibilities."**

Victoria Picena  
AR Idealease

**"We now look forward to partnering with Billtrust to automate our collections efforts by rolling out Billtrust Collections to assist with efficiently managing accounts receivable collections and aging processes."**

Carrie Poston  
Director of Information Technology



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