

AI-POWERED INVOICE-TO-SALESFORCE PIPELINE

Scaling Invoice Processing with AI for Fleet Services



TFS automated complex invoice processing to scale without adding headcount. TFS, a fleet and equipment services provider, replaced manual invoice processing - including data extraction, validation, and work categorization - with AI-driven automation to handle high-volume, highly variable invoices directly into Salesforce.

"We turned invoice processing from a manual bottleneck into a scalable, automated operation that supports growth and better customer insights."

— Executive, TFS

THE IMPACT

From weeks to near **real time**—AI turned invoice processing into a **growth enabler**.

- ✓ Invoice volume scales without adding headcount
- ✓ Turnaround time reduced from two to three weeks to near real-time
- ✓ Cleaner asset and maintenance data enables deeper cost-savings analysis
- ✓ New value-added service unlocked for customers

60%+
of invoices
processed with no
human touch

THE CHALLENGE

TFS processes thousands of vendor invoices each month to support forklift maintenance, rentals, and repairs. Invoices arrive by email in inconsistent formats and require interpretive judgment, not simple data entry.

Manual processing created backlogs, limited scalability, and inconsistent data quality—forcing a tradeoff between growth and hiring more staff.

THE SOLUTION

TFS implemented an AI-powered invoice-to-Salesforce pipeline:

- AI ingests emailed invoices and normalizes attachments
- OCR and LLMs extract line-item data and categorize maintenance types
- Work orders are automatically created in Salesforce
- Staff review only true exceptions

THE ONE BIG RESULT

60%+ Touchless Invoice Processing - AI converted invoice operations from a cost center into a value-added capability.