

CASE STUDIES

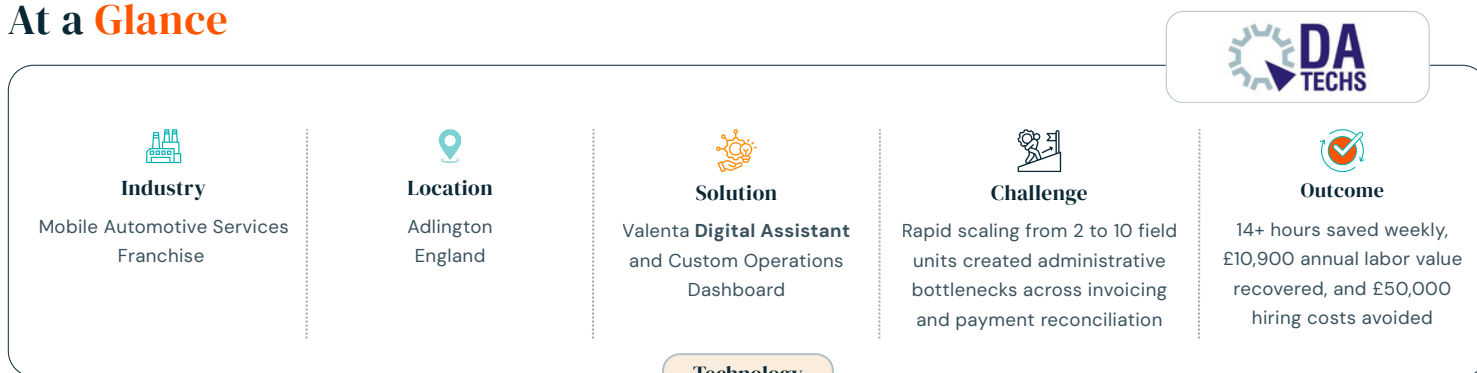
DA TECHS

Intelligent Automation for a High-Growth Franchise Business

Rapid growth created administrative bottlenecks across invoicing and payment reconciliation. By implementing a Valenta Digital Assistant, DA Techs reduced manual effort, improved visibility, and created a scalable operational foundation.

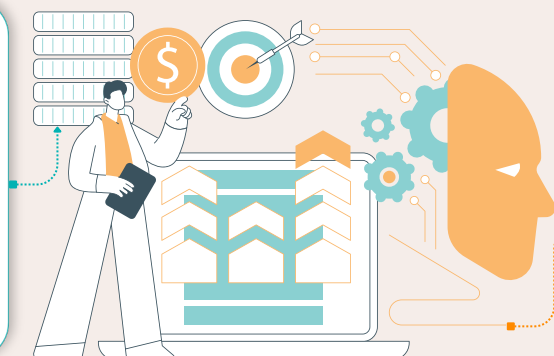


At a Glance



What We Delivered

- Real-time KPI dashboard
- Actual vs. Forecast tracking
- Multi-segment financial visibility
- Custom drill-down filters
- Iterative feedback process



Process Scope

Automated invoice creation, remittance processing, payment reconciliation, customer matching, operational reporting, revenue visibility, fleet monitoring, health and safety compliance tracking, and business performance management across a rapidly expanding franchise network.

About DA TECHS

DA Techs is a mobile automotive services franchise operating across distributed field teams. Rapid expansion increased both revenue opportunities and administrative complexity, creating pressure on internal resources and operational processes.

The Challenge

Success should never feel like a crisis. In just six months, DA Techs grew its fleet from 2 to 10 field units. While growth accelerated revenue, it also created a significant administrative burden, and Office Manager Karen Boardman and her team were stretched thin managing invoice and payment reconciliation across every job and van.

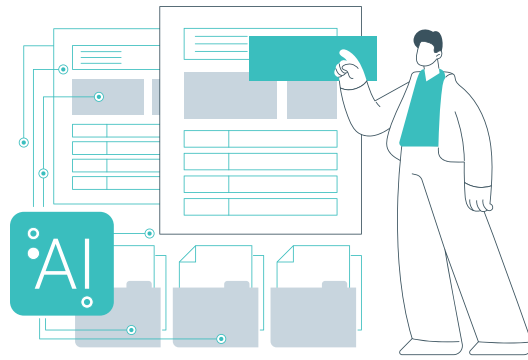
Every job required manual data entry: cross-referencing job sheets with customer records, matching invoices to van-specific cost centers, and updating accounts receivable by hand. Every payment required manual reconciliation: reading remittances, recognizing company names, matching invoice numbers, and updating balances, one transaction at a time.

"The business went from having two vans to 10 vans in a very short space of time, along with all the extra admin that entails. It became increasingly difficult to fit in everything we needed to do in the same amount of time."

Karen Boardman, Office Manager

Our Approach

- 1 Workflow Assessment
- 2 Data Integration
- 3 Automation Configuration
- 4 Testing & Validation
- 5 Go-Live & Support



Mapped DA Techs' existing invoicing and payment reconciliation workflows end to end, identifying where manual handoffs were costing the most time.

Configured the Digital Assistant's automation rules for invoice generation and intelligent payment reconciliation, treating each van as its own cost center

Integrated core data sources, including the customer database, job management system, and van safety tracking, into a single automation environment

Our Solution

The Valenta Digital Assistant automates invoicing, reads remittances, identifies company names, matches invoice numbers, reconciles payments automatically, and flags exceptions when required.

Automated invoice generation, pulling job data and generating van-level invoices against each cost center

Intelligent payment reconciliation that reads remittances, matches invoice numbers, and reconciles payments automatically, with exceptions flagged for review

Custom operations dashboard with daily, real-time revenue and performance tracking across the field network

Integrated compliance and safety monitoring through DA Techs' CheckedSafe system, including automated maintenance alerts and audit trails

Centralized operations hub linking marketing assets and the uniform ordering system for field teams

Business Impact

By implementing a Valenta Digital Assistant to automate invoicing and payment reconciliation, DA Techs eliminated repetitive administrative work and created a scalable operational foundation to support continued franchise growth.



Time savings that scale

The Digital Assistant saves DA Techs at least 14 hours every week that would otherwise be spent on administration, invoicing, and remittance processing.



Hiring costs avoided

Instead of recruiting additional administrative staff to manage growing workloads, DA Techs used automation to absorb increasing operational demands, avoiding approximately £50,000 in annual hiring costs.



Faster, more accurate financial processes

Invoice creation, customer matching, payment reconciliation, and cost-center allocation are now completed with significantly less manual intervention, reducing processing delays and improving accuracy.



Operational visibility for growth

The Digital Assistant became the foundation for broader operational intelligence initiatives, supporting dashboard visibility, reporting improvements, and future technology investments across the business.

Ready to Scale without adding Overhead?

Valenta Digital Assistants deliver measurable ROI for businesses experiencing rapid growth and administrative bottlenecks.

Scan to Learn more about Valenta's model →



Contact:

