

CUSTOMER SUCCESS STORY

Energy Services Leader Enhances Tax Accuracy with Automation

Secure Energy Services is a market-leading energy services company that assists clients throughout the energy lifecycle in Western Canada and North Dakota. With staff in three Canadian provinces as well as the U.S., the finance team struggled with complex tax calculations as they manually processed and approved expense reports.

The Goods and Services Tax (GST) in Canada requires that different types of expenses be eligible at varying percentages. This created a complex approvals process for the finance team, who had to manually review more than 600 monthly expense reports to fact-check tax calculations. They reached out to Certify in 2015, to see if an automated solution could be custom-built.

SECURE ENERGY EXPENSE MANAGEMENT CHALLENGES:

- Complex tax calculations across multiple Canadian provinces and the U.S.
- Labor-intensive, manual processes mired in spreadsheets and paper
- Lack of visibility and the risk of auditing blind spots
- Corporate card users had a limited functionality application provided by the card provider



Secure Energy Services is a leading North American energy services company that provides safe and environmentally responsible fluids and solids solutions to energy companies in Canada and the U.S.

Established: 2007

Headquarters: Calgary, AB, Canada

Employees: 1,450 worldwide

Customer Since: 2015

Benefits with Certify

1,000

users in Canada and the U.S.
submitting reports with Certify



50%

half of the annual salary of one
full time employee in savings



625

automated expense reports
each month



“Proper tax calculation was required as part of our automation project. If it wasn’t included, we would have had to custom build the processing before importing it into our financial systems—which would have been costly and difficult to maintain.”

Greg Bratton
Director, Information Technology
Secure Energy Services

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AUTOMATED ACCURACY AND INCREASED VISIBILITY

Certify combined its automated software with a custom-built tax table, where the correct tax amounts and general ledger categories for expense items are imported directly into the team's ERP system. The entire T&E process is now automated with users effortlessly snapping photos of receipts and Certify software parsing all necessary calculations. Accountants simply need to check that expenses are in the correct category as they approve reports. This has dramatically reduced their workload and created more visibility.

ADDITIONAL BENEFITS WITH CERTIFY:

- **Saved time and money**—switching to automation has saved the equivalent of six months of a full-time employee's salary.
- **More efficiency and fewer headaches**—taxes are now automatically calculated, allowing the accounting team to focus less on fact-checking and more on strategy.
- **Increased accuracy and visibility**—the previous manual methods for checking GST taxes were prone to error. The automated solution eliminates this and offers a granular visibility that allows audit histories to be easily accessed.
- **Ease-of-use**—end users enjoy a streamlined, mobile process, and can submit expense reports that practically build themselves.

“The Certify data team was very responsive in creating the tax table and responding to problems during the development process. We have needed little support since going live.”

Greg Bratton
Director, Information Technology
Secure Energy Services

CERTIFY IS TRAVEL AND EXPENSE MADE EASY

With thousands of users and satisfied customers around the globe, Certify is the leading fully automated travel and expense management solution for companies of every size. Certify's intuitive, easy-to-use web-based interface and advanced mobile application with electronic receipt capture allow organizations to book travel and complete expense reports and reimbursement quickly, easily, and cost-effectively. All while reducing overhead processing costs, increasing compliance with corporate policy, and simplifying the overall T&E management process for employees, accountants, and administrators.

**What can the end-to-end travel and expense management solution from Certify do for you?
Contact us today and find out more.**