



# How Build Group uses On!Track data to improve billing accuracy and automatically generate invoices



## Authors Note

As the Asset Operations Manager at Build Group, I am responsible for the overall success of the Asset department. Daily, I oversee asset procurement, tracking, financial analysis, hands-on operations with project teams, and much more. Read on to hear how I am leveraging Toric to automate data ingestion, create interactive dashboard, and quickly generate accurate invoices for asset rentals.

## Overview

Build Group is a rapidly expanding general contractor. We're not only a general contractor but also a construction manager, design builder, and we self-perform structural concrete, glazing, metal framing, drywall, insulation, plaster, millwork, and flooring. Because of these capabilities, we leverage a high volume of technology that creates data daily and sometimes hourly.

We are always looking to partner with new tools and emerging technology that can help us measure our effectiveness to regularly refine our process, improve our teamwork, and above all, our client service. For the next step in our data processes and strategy, we partnered with Toric's data analytics workspace to improve how we store, transform, manage, and visualize our data.

"Toric allows us to create a detailed view of our assets and automatically generate invoices that I can easily download in seconds. Getting an invoice into an owner's hands - a process that used to take me 40 hours a week - now takes me less than ten minutes to accomplish."



**Lorena Lucas**

Asset Operations Manager at Build Group

## Key Facts

### Industry

Construction

### Data Sources

Hilti, On!Track

### Data Services

Excel, Amazon S3, Azure Blob Storage, Google Cloud Storage, Snowflake, Databricks, Amazon Redshift, Azure Synapse Google BigQuery

### Objective

Automate the monthly invoicing process for job sites by leveraging Asset Management data from OnTrack.

### Results

Improved process from 40 hours to 4 minutes and saved over 400+ hours in 10 months. Invoicing is now 600x faster with Toric.

# Challenge

For Build Group and many companies in the industry like ours, we were using so much technology but relied on Excel spreadsheets to store and communicate critical data created from these technologies. While Excel serves its purposes, we identified critical errors causing data to be more challenging to use – spreadsheets go from hand to hand, data formats are entered differently by each person, and lack of version control can result in accidentally losing data forever.

As we started looking into the next step of our data strategy and how to solve our data challenges, we partnered with Toric to identify how we could better manage the data created from our tools like Procore, Revit, On!Trak, or Oracle P6.

The first problem I sought to solve with Toric was improving our billing and invoicing. We rent a large volume of equipment out to projects and job sites, and we have to send monthly invoices billed against each project. We use On!Trak, an asset management tool, to track the information needed, like where each piece of equipment is, what project it was rented to, and at what point in time for that month's billing.

Before Toric, using On!Trak and Excel spreadsheets to generate invoicing was lengthy, and the data was unreliable. The scale of this work includes sending anywhere from 40-50 invoices for over 300 items a month. It would take me upwards of three days to get the data, reports, and invoices in the place where I needed them to be. Once I sent the invoice, I often got calls daily, going back and forth on invoice accuracy. It was stressful to go through that manual work and wait to hear from the project owner if the invoice looked accurate.

Our inefficient and inaccurate data processes caused us to dedicate valuable resources to ensuring data and reports were accurate and actionable. Billing errors could have also resulted in profit loss if projects were underbilled.

## Solution

We partnered with Toric and used the data integration, operations, and visualization capabilities to transform our data into something actionable. For invoicing and billing, I worked with the Toric team to build a solution that does two critical things:

1. **Create a dashboard** that clearly answers all the questions needed to generate our invoices at the end of the month. I can easily see at a high-level the total amount to be billed per project or drill into a more detailed breakdown and see the cost per asset type.
2. **Automatically create a detailed invoice** from this dashboard data that I can download directly from Toric. Within seconds I can download these Invoices and send them to Project Teams.

By leveraging dataflows, automation, and visualizations, I can create a predictable and repeatable process that has automated asset invoicing for all of our projects. With Toric, I get actionable asset tracking data in a clean, detailed view that automatically generates invoices that I can download in seconds.

Our data is automatically transformed into an actionable form, the manual processes to build our reports and dashboards has been eliminated, and our invoicing estimates are more accurate, resulting in less back and forth with owners.

"Toric essentially replaced a software we had for Asset Costing and is now gathering a very messy tracking data software into precisely what we need to do our asset costing and have the best of both worlds. We can now generate our end of month invoices within seconds."



**Lorena Lucas**  
Asset Operations Manager

## Results

**Toric is now involved in the day-to-day processes of our asset tracking and data operations without me needing to manage or even log in to Toric every day. The dataflows and automation we build to ingest, transform, organize, and visualize our data have made this time savings repeatable and sustainable.**

Since starting our partnership with Toric in May of 2022, I've estimated that we saved 400 hours of work on just one use case. Getting an invoice into an owner's hands – a process that used to take me 40 hours a week – now takes me less than ten minutes to accomplish. We've begun exploring new use cases and working with the Customer Success team to identify what is next for us in Toric.