

PaperLess Case Study

Previously paper invoices were passed from schools to the central team in plastic wallets. Paperless means that all invoices can now come in centrally and be sent out to schools via document flows saving numerous trips and rising fuel costs. As a result, we spend far less time tracking down invoices, and saving on printing from schools printing invoices by having suppliers email to one central email address where the invoices are uploaded to PaperLess and issued to schools via document flows.

The main objectives were to be able have schools being able to code and approve invoices locally with the central team overseeing the process, a full audit trail for our auditors.

The ease and look of the system stood out to us when we were looking at a system that would fit our needs. It is easy to navigate for both those in the central team and at school level.

The whole finance team are able to use the system and assist with queries regarding any queries from suppliers about payment and we can easily update suppliers regarding whereabouts their invoice is in the process. We are now in a great position with payment runs and having a true reflection of invoices that are coming into the Trust, and when we are missing invoices it is generally because the suppliers haven't sent or issued them to the correct email address.

The document flow and the ability to change this as required saves time and flexibility of the system i.e. adding in additional workflows for invoices over a certain amount are a great feature. PaperLess is compatible with Sage 200 for Education and posts the invoices from PaperLess that have been approved directly to our financial accounting software at the click of a button.

The set up and support from PaperLess is impressive and the response is quick and efficient. Steve Richmond, our training & sales consultant has been really supportive and has suggestions with how we can further use PaperLess to its full potential. The updates are done seamlessly and when there has been a failed update, I have emailed the support team had already dealt with the issue behind the scenes. We are excited about the future development of web based PaperLess and to continue working with PaperLess going forwards.