

## FERNE ANIMAL SANCTUARY

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### BACKGROUND

Founded in 1939, Ferne Animal Sanctuary in Somerset was established to care for the pets of service men and women. More than 85 years on, the charity now provides a haven for over 300 animals of all kinds and continues to rely on grants and donations to fund its work. Open to visitors, Ferne also offers rehoming and boarding services, making efficient financial processes essential to sustaining its mission.

### THE CHALLENGE

As a charity that relies on grants and donations, it is vital for Ferne Animal Sanctuary to maintain clear, efficient financial processes. However, their previous invoice processing workflow, being largely manual, was time-consuming and prone to delays and errors.

The process involved sending invoices to the relevant budget holder via email. If an invoice arrived in paper format, it first had to be

scanned and saved as a PDF before it could be forwarded. From there, the budget holder would have to either print the invoice, sign it, and scan it back in, or digitally sign it with Adobe and then return it via email. Finally, all invoice data had to be manually entered into Sage 50 for payment. This hands-on approach often led to delays in approval and occasional data entry mistakes.

Recognising the need for a more streamlined system, the finance team at Ferne Animal Sanctuary began looking for a solution to automate and improve their workflow. As their Finance Assistant explained: *"We were looking for a system that could automate the approval process and provide a better way of storing the invoices than just as PDF documents. We also wanted some automation in reading the invoices and entering their contents into Sage 50, rather than typing in each invoice manually."*



## THE SOLUTION

After reviewing several potential solutions, the finance team at Ferne Animal Sanctuary chose to move forward with Verify, Agilico's cloud-based automated invoice processing solution, which integrates directly with Sage 50. "When reviewing other systems alongside Verify, the clarity and ease of use of the system was definitely something that appealed to us over the other options," explained the Sanctuary's Finance Assistant.

Installation and training were also straightforward thanks to Agilico's expert support team, who guided Ferne Animal Sanctuary through setup and onboarding. "As with any new system, I expected that it would take a lot of time and effort to iron out problems at the start," their Finance Assistant said. "But that wasn't the case – it was easy to set up and was running smoothly in no time."

Ferne Animal Sanctuary's new accounts payable process is now far more intuitive and efficient. Invoices received by email are simply dragged into a dedicated 'Verify' folder, from where they are automatically uploaded to Verify. Verify then extracts the key information, such as the values, invoice number, tax points and line information, and identifies the supplier in Sage 50, pulling in any default coding associated with that supplier. If anything is captured incorrectly, which the Finance Assistant notes is rare, it can be easily amended.

The improvements to the approval process have made invoice handling significantly easier across the entire charity. Their Finance Assistant said, "The approval process now works so much better – the routing of where the invoice is sent for approval can be configured in any way we need, and is easy to amend and add to whenever required." Ferne Animal Sanctuary has implemented tiered approval levels with designated approvers for each department. Additionally, they've built in exception routes that allow invoices to be redirected to different approvers based on specific criteria – such as the supplier or coding – offering both structure and flexibility within the workflow.

If any issues arise with the system, the Verify Support Team is readily available to assist whenever needed. The Sanctuary's Finance Assistant shared their experience: "Another thing I really appreciate is that Agilico's support helpdesk is fantastic – they are always available, helpful, prompt and responsive – this is very much appreciated."

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*Finance Assistant, Ferne Animal Sanctuary*



## THE BENEFITS

Verify has saved Ferne Animal Sanctuary a significant amount of time each month. The finance team estimates they have saved at least 10 hours monthly on emailing and approving invoices – time that can now be redirected toward more meaningful aspects of running a charity.

Beyond achieving the initial goals set before implementing the system, the finance team has discovered several unexpected benefits of automation. One key advantage is the automatic time-stamping and audit history built into the solution, which has proven invaluable during year-end audits. Every invoice includes a clear audit trail, outlining who approved it and when. Auditors are also granted read-only access to Verify, eliminating the need for the finance team to manually retrieve supplier invoices – saving valuable time during a very busy period.

Supplier payment runs have also become much quicker, cutting down processing time by an

estimated two hours per month. Previously, the team had to compile all invoices into a single PDF for approval. Now, with Verify, they can generate and export an 'invoice report' listing all invoices awaiting payment on Sage 50, complete with hyperlinks that open each invoice in Verify. This streamlined process allows the team to quickly cross-reference with Sage 50 and identify what needs to be paid, reducing manual effort and lowering the risk of missed payments.

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## OUTCOME

With Verify taking care of invoice processing, Ferne Animal Sanctuary can dedicate more time and energy to what truly matters: caring for the hundreds of animals that call the sanctuary home. The finance team now works with confidence, knowing their processes are efficient, compliant and future-ready. The Finance Assistant explains: *"Verify has saved us significant time and given us the added value of audit history on every invoice. It has transformed the way we process invoices."*

By streamlining financial administration, Verify ensures Ferne makes the most of every donation and grant; strengthening the sanctuary's ability to continue its vital work for generations to come.

## RESULTS

- ▶ **10 hours per month** in saving, emailing, authorising and manually entering invoices
- ▶ **2 hours per month** in processing payment runs

## ABOUT AGILICO VERIFY

Agilico Verify is an automated accounts payable system that enables you to process all your supplier invoices with ease.

Directly integrated with the most popular finance systems, Agilico Verify makes paperless invoice processing effortless.

So much more than just a data capture and invoice posting tool, Verify enables you to route invoices for coding and approval.

Scan to learn more about Verify.

