

Customer Success Story

Wellington Girls College & ApprovalMax

Enabling paperless accounting environment in a New Zealand school

#AccountingAdvisory

#Education

#PurchaseOrders

#NotForProfits

#AUNZ



ALYS FREEMAN

Business Manager Wellington Girls' College

"We got ApprovalMax for the paperless distribution of invoices and easy tracking of the approval process. It also lets us set up multiple approval levels depending on invoice amounts

In general, it saves us a lot of time. Suppliers are encouraged to email their invoices straight to Hubdoc and the finance department makes sure they go directly to the responsible budget holders, who'll find a digital copy in their ApprovalMax records. So, nothing gets lost any more. Every invoice with the complete approval history is stored in Xero, which has significantly reduced both the on-site visit time for annual audits and follow-up enquires."



Company

Wellington Girls' College is a state school in New Zealand. Including fee-paying international pupils it has a roll of 1,520 students and employs over 140 people. The school offers a wide range of curriculum subjects and comprehensive extracurricular programmes.

Type of business

State school

Location

NZ



The challenge

Wellington Girls' College's transformation to a paperless environment was actually driven by need, as the number of students has increased from 1,100 to 1,500 in the last 20 years and is expected to keep growing. At the same time, there are still just two people doing all the accounting.

Wellington Girls' College has no central purchasing department but more than 60 cost centres, each with their own budget holder who can purchase or incur costs within a certain limit. Before going digital, paper invoices literally worked their way through the pigeonholes in the staff room. The trickiest part was getting approvals from external people. Prior to payments the business manager reviewed the hard copies of every single invoice to check coding and appropriateness of the spending and if they had been correctly approved. Once paid, invoices were boxed and stored until needed for an audit.

Introducing paperless distribution of invoices and easy tracking of the approval process

The school moved to Xero and implemented Monty as a reporting app. Then they chose Hubdoc as their data capture tool, eliminating

manual entry. And finally, they got ApprovalMax for the paperless distribution of invoices and easy tracking of the approval process. ApprovalMax also acts as a tool allowing to set up multiple approval levels depending on invoice amounts.

Invoices are submitted to Xero, where Approval Max picks them up. They are then routed to the responsible budget holders, who also get a notification about new approval requests by email or phone. Once approved, every invoice goes to the business manager who acts as the second approver. He completes the same checks as before and approves the invoice for payment. Invoices over a set amount must be authorised by a third approver, the principal. When all required approvals are in place, payment can proceed.

Results of the implementation

- ✓ Fully paperless workflow and complete eradication of error-prone and time inefficient manual authorisations
- ✓ Transparency and control: invoices cannot "go missing", as it is easy to track them
- ✓ Flexibility of setting up workflows depending on invoice values
- ✓ Convenience for the budget holders: it is easy to approve via laptop or app

"The unexpected benefit of moving to a digital environment for the accounting processes has meant the Finance team has operated seamlessly during the current Covid 19 conditions. A year ago, we could not have continued "business as usual",
– says **Alys Freeman, Business Manager at Wellington Girls' College.**



The Approval App You'll Love Using

ApprovalMax extends the online accounting platform Xero with approval-driven financial controls for Accounts Payable and Accounts Receivable. It replaces paper- and email-based approvals with fully automated multi-role and multi-tiered approval workflows, and ensures spend control and regulatory compliance for both internal accounting and financial service outsourcing organisations