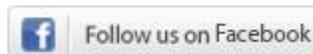
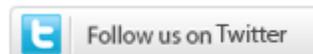


over  
1700  
installations in  
Europe



## PaperLess Case Study

**How is PaperLess for Sage Education enabling Elevate Multi Academy Trust to speed-up invoice processing and approval routines?**



Elevate Multi Academy Trust is an education institution focused on children, families and their educational journey. For the people responsible for the Trust, the amount of paper invoices received and the increasing number of academies joining the trust in varying locations, were key elements that led to the pursuit and implementation of PaperLess for Sage Education.

*With PaperLess they can trace in seconds any documents they need to scrutinise*



It was also important to ensure Headteachers could view, approve and, if required, dispute invoices with ease. The Document Management System to be implemented would need to fit all these requirements and work together with Sage for Education.

**Why was PaperLess for Sage Education the Trust's choice to manage, process and approve invoices?**

The know-how and experience of more than 20 years' operating in the document management sector gave PaperLess the necessary set of skills to be the only software provider to offer the unique set of features required by the Trust while, at the same time, offering a seamlessly integration with Sage for Education.

Such features go from automatic invoice recognition and automatic attach of invoices to transactions in Sage for Education to Online Invoice Approval and Automatic Scanning of Invoices into Sage for Education.



Another important factor that led to the choice of PaperLess Document Management was the positive results achieved by other schools using PaperLess. This resulted in PaperLess being recommended to Elevate Multi Academy Trust as the best Document Management Solution for Sage for Education.

By having PaperLess recommended to them, the learning institution got the necessary assurance that their main goals - reduce usage of paper and printing costs and the time for invoices to be authorised – could be easily achieved by PaperLess.

### **PaperLess for Sage Education Implementation... Is it very time consuming?**

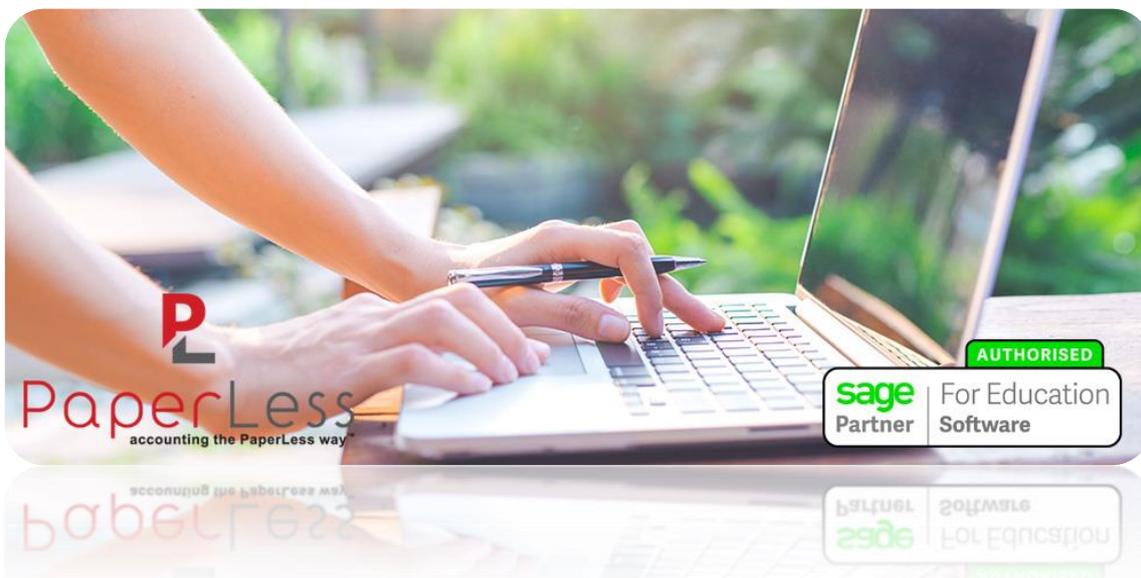
The Trust describes the implementation process as smooth and straightforward process, with the added advantaged that it did not cause any down time in their Sage for Education.

With the clear instructions provided by Paperless throughout the implementation process and ongoing support when required, the experience of Elevate Multi Academy Trust has been great.

### **How did PaperLess for Sage Education help the Trust speed up invoice processing and approval routines?**

Well, first of all with PaperLess Headteachers have the overview of every invoice and the ability to challenge or make notes in one system. According to the Trust representative, before PaperLess this was a time consuming, prone to error and difficult process.

Headteachers value the ability to see each invoice they approve and how easy it is to leave notes and request corrections. Another major aspect is the fact that once the approval process is complete the approval history can be accessed directly from Sage or via PaperLess Accounting Archive.



Elevate is also currently using PaperLess Company Inbox to fully automate processing of invoices received via email, resulting in a faster turnaround time which benefits suppliers as they are paid promptly.

Besides providing control and speeding up invoice processing and approval processes, PaperLess also plays an important role in assisting the efficient, robust and transparent accounting processes required for audit purposes, as well as to comply with the Trust Financial Strategy.

The fact that documents are automatically attached to the corresponding transactions in Sage and easily accessible either from within Sage or via PaperLess Accounting archive is also quite valued by the Trust's Auditors and Consultants. With PaperLess they can trace in seconds any documents they need to scrutinise.

### **How much have Elevate Multi Academy Trust saved with the implementation of PaperLess Software?**

Considering that in the first year of using Paperless around 10,000 documents were processed, the Trust did not have to support the associated costs with printing, scanning and archiving those documents.

However, more importantly were the savings achieved in turnaround time in processing invoices. Before PaperLess, hard copy invoices were sent to Headteachers for approval, then they had to be returned to the Central Team which would then input them into Sage. This process was time consuming and difficult to manage, causing that suppliers would occasionally be paid late.

With PaperLess playing a major role on invoice processing automation, the school knows that it has the necessary tools to cope with the increasing number of invoices generated by the Trust's growth.

Nowadays, invoice processing is fully automated with the Trust's invoices received in one centralised inbox and with invoice data automatically captured by PaperLess Invoice Recognition. Accounts teams only need to review the data and send the invoices for approval. Once approval is given, the transaction is automatically posted to Sage and the invoice is automatically attached to the corresponding transactions in Sage for Education.

[Click here](#) to learn more about Elevate Multi Academy Trust

[Click here](#) to learn more about PaperLess