



CROSSROAD ACADEMY  
CHARTER SCHOOL OF BUSINESS

CASE STUDY

## EDUCATION

“

*Before PLANERGY, we had to chase paper approvals, making purchasing time-consuming. Now, everything is digital, and approvals are just a click away.*

”

Franklin Scott, Director of Operations,  
Crossroad Academy Charter School

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**PLANERGY**  
For Charter Schools



**Charter schools in the United States operate under strict financial regulations while striving to maintain efficiency and accountability.**

Crossroad Academy Charter School, a long-standing PLANERGY user, faced challenges in streamlining purchasing, managing compliance, and optimizing operational efficiency.

With increasing financial oversight and budget constraints, Crossroad Academy needed a spend management system that provided visibility, accuracy, and automation. PLANERGY is a critical tool in their operations, enhancing financial control and ensuring seamless procurement processes.

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*PLANERGY has not only saved us time but has also given us greater control over our finances. It's made managing school spending simple and efficient.*

”

Franklin Scott, Director of Operations,  
Crossroad Academy Charter School

## The Challenge: Manual Processes and Limited Visibility

Before implementing PLANERGY, Crossroad Academy struggled with:

-  **A manual purchase order system** that required running paperwork between approvers, delaying procurement.
-  **Limited visibility** into past invoices and approvals, making vendor payments inefficient.
-  **Compliance challenges**, requiring detailed reporting for tax-funded expenditures.
-  **Disconnected financial systems**, QuickBooks Desktop used for accounting had no procurement processes.



Additionally, the school needed a more structured way to ensure that purchases aligned with budgetary constraints. Managing spend across different departments with limited financial oversight led to inefficiencies and unnecessary costs.



## The Solution:

### Implementing PLANERGY for Seamless Spend Management

Crossroad Academy adopted PLANERGY to eliminate inefficiencies and introduce structured financial controls. The key benefits included:

#### 1. Digital Procurement and Approvals

By moving to a **fully digital procurement system**, the school **eliminated the need for physical paperwork**. Purchase orders (POs) are now created, reviewed, and approved within the system, **significantly reducing administrative delays**. The automated process also ensures that orders are placed only with approved vendors, reducing maverick spending.

*"The ease of access and time savings with PLANERGY are incredible. No more running around for approvals—we receive notifications and process everything quickly."*

Franklin Scott, Director of Operations,  
Crossroad Academy Charter School

#### 2. Enhanced Financial Oversight

With PLANERGY, **all financial data is centralized**, providing a single source of truth. **The school's finance team can track spending in real-time**, ensuring compliance with budgetary restrictions and state funding requirements. This has been instrumental in **improving financial accountability and audit readiness**.

*"PLANERGY allows us to instantly research previous invoices and track vendor payments without digging through files. It's a game-changer for our financial reporting."*

Franklin Scott, Director of Operations,  
Crossroad Academy Charter School

#### 3. QuickBooks Integration

PLANERGY fully integrates with **QuickBooks Desktop**, streamlining financial data transfer, further **reducing manual work and improving data accuracy**. The integration allows for real-time financial updates, **reducing reconciliation time between systems**.

#### 4. Time Savings in Accounts Payable

PLANERGY's automation features **significantly reduced the time needed to manage invoices and payments**. Before, staff manually matched invoices with POs and approvals. Now, the system automates this process, freeing up time for other administrative tasks. Additionally, **duplicate payments and missed invoices have been eliminated**.

*"Our accounts payable process is much faster now. Matching invoices used to be manual; with PLANERGY, it's automatic and error-free."*

Franklin Scott, Director of Operations,  
Crossroad Academy Charter School

#### 5. Compliance and Audit Readiness

As a publicly funded charter school, Crossroad Academy **must comply with strict financial reporting requirements**. PLANERGY ensures that **every transaction is logged, providing an audit trail** that simplifies reporting to the school district and government agencies. The ability to generate **real-time financial reports** has been invaluable for compliance and strategic planning.

## Business Impact

The adoption of PLANERGY has brought measurable improvements to Crossroad Academy's financial operations:

### Increased financial control:

The school now has real-time tracking of all expenditures, reducing unauthorized spend.



### Stronger compliance:

Detailed audit trails ensure all purchases align with school district requirements.



### Scalability:

The system can easily accommodate future expansion without adding administrative burden.



### Faster approvals:

POs are now approved in hours instead of days.



Additionally, PLANERGY has improved collaboration among different departments, ensuring that all stakeholders have access to procurement data and financial reports in real-time.

## Overcoming Challenges & Future Enhancements

Despite its success, there are areas where Crossroad Academy sees potential improvements:

### Enhancing Vendor Collaboration:

Encouraging vendors to engage more directly with PLANERGY's procurement processes can lead to improved efficiency, faster invoice reconciliation, and stronger supplier relationships.

### Advanced Reporting Utilization:

More extensive use of PLANERGY's advanced reporting will further streamline compliance tracking and financial audits.

### Supplier Communication and Invoice Matching:

Making vendors submit invoices directly into PLANERGY would further streamline

processes and reduce back-and-forth email communication.

By embracing the PLANERGY enhancements, Crossroad Academy will continue to optimize its financial operations, ensuring long-term sustainability and efficiency. The adaptability of PLANERGY means that as the school grows, its spend management capabilities will scale alongside it, providing a reliable foundation for financial excellence.

## Conclusion

PLANERGY has revolutionized spend management for Crossroad Academy Charter School, transforming an outdated, paper-based system into a streamlined, digital workflow. With improved efficiency, compliance, and financial oversight, the school can focus on its mission—educating students—without being bogged down by administrative inefficiencies.

For charter schools looking to enhance financial control, PLANERGY offers a proven, user-friendly solution that simplifies procurement, improves reporting, and ensures regulatory compliance.

As the education sector continues to modernize, digital procurement tools like PLANERGY will play an essential role in helping schools manage budgets effectively while ensuring full compliance with public funding requirements.

**PLANERGY**  
For Charter Schools

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