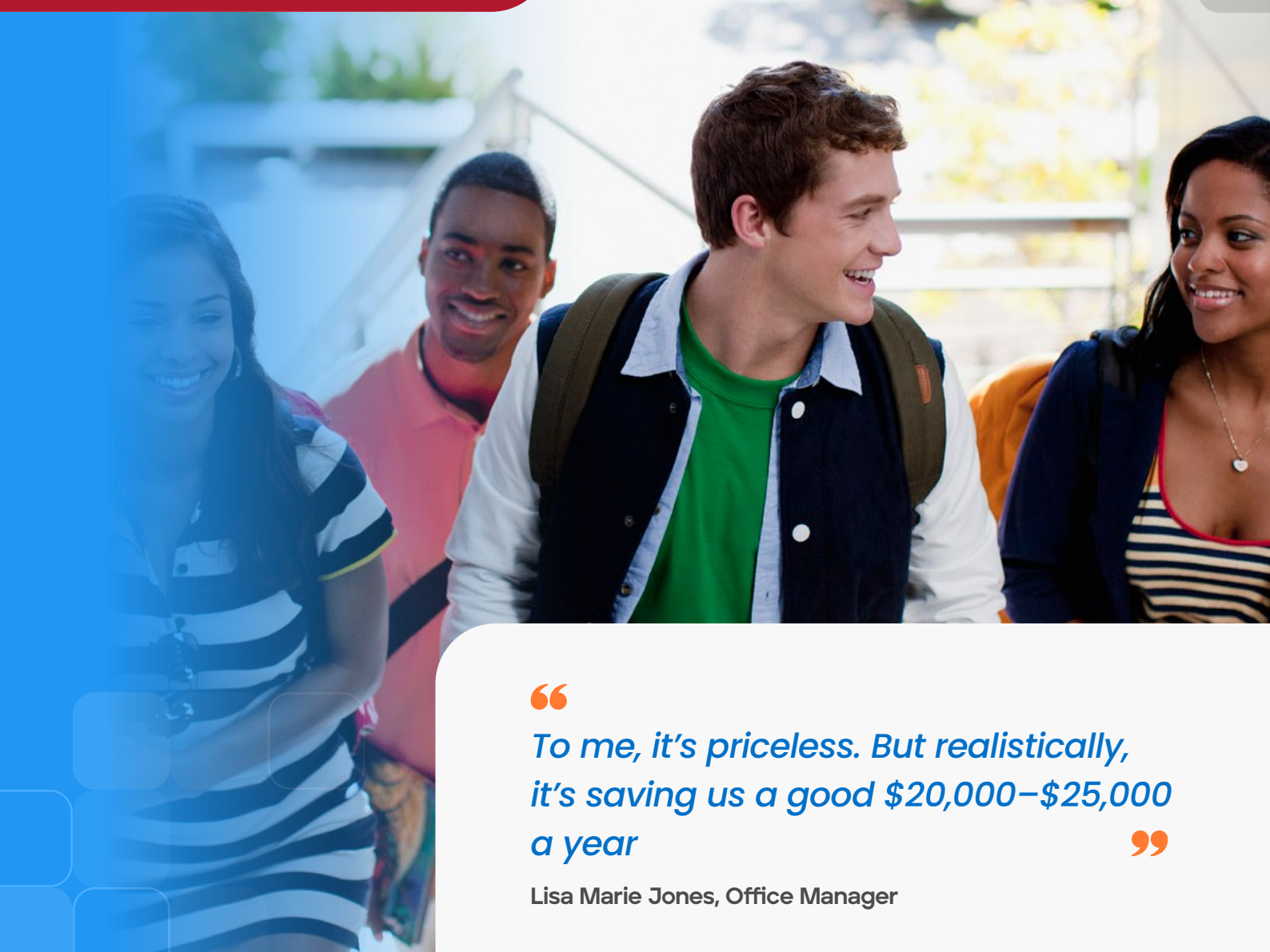


EDUCATION



“

To me, it's priceless. But realistically, it's saving us a good \$20,000–\$25,000 a year

”

Lisa Marie Jones, Office Manager

Lake Country Christian School (LCCS), a thriving private K-12 school in Fort Worth, Texas, serving over 600 students across its 30-acre campus has always set a high standard for excellence.

It faced a growing challenge managing its spending across departments while maintaining visibility and control over budgets was becoming a growing challenge.

Legacy tools were glitchy and inefficient, and workflows were manually intensive. Since implementing PLANERGY, the school has transformed its Procure-to-Pay operations—cutting paper use, improving visibility, and saving significant time and labor.



Challenges Before PLANERGY:

Too Many Glitches, Too Little Control

LCCS was previously using a platform called DPO that, while user-friendly in design, failed in performance.

The school's AP process relied heavily on manual data entry, limited visibility into budgets, and fragmented purchasing across departments.

Teachers and department heads lacked real-time clarity on available funds, and the AP team struggled with vendor communication and invoice matching.



"We were using a product called DPO and before that SpendMap but there were so many glitches, so many errors—it was causing more problems than it solved."

Lisa Marie Jones, Purchasing & Budget Manager

Why PLANERGY:

Lake Country Christian School needed a reliable solution that could:



Integrate seamlessly with QuickBooks



Deliver at-a-glance visibility on budgets and spending



Support distributed purchasing while maintaining financial control



Provide PunchOut catalog integration with major vendors such as Amazon



Simplify receiving and approval workflows



Implementation & Experience

LCCS now processes roughly 350 orders a month with 21 users in PLANERGY, supporting a broader team of over 100 staff members. Key features embraced by the school include:

Seamless QuickBooks Integration

"The way it integrates with QuickBooks is fantastic. All the attachments carry over. That's huge for us."

Susan Meisinger, Account Payable Clerk

Receiving & Approvals

The receiving process enables multi-site accountability which is especially important across a large campus with decentralized purchasing.



“

I love the receiving feature. We don't keep inventory, but with such a big campus, I use it to know if items were approved to pay. It's how I make sure everything is right before sending payments.

”

Susan Meisinger, Account Payable Clerk



Key Wins

Amazon PunchOut Integration

"We can't live without the Amazon PunchOut, using it in PLANERGY is a game changer. We'll use all the PunchOuts that PLANERGY adds

Lisa Marie Jones, Purchasing & Budget Manager

Smart Storage & Audit Readiness

"PLANERGY acts like a smart storage system. It saves our auditors well over 20 hours of audit process time, we can immediately find all the paperwork for them—no more paper files."

Susan Meisinger, Account Payable Clerk

Clear ROI

"To me, it's priceless. But realistically, it's saving us a good \$20,000-\$25,000 a year"

Lisa Marie Jones, Purchasing & Budget Manager



“ PLANERGY is seamless. It really is an easy transaction from start to finish. The checks and balances are there, and it saves us hours. ”

Lisa Marie Jones, Purchasing & Budget Manager

The Bottom Line

PLANERGY has become an essential part of daily operations at Lake Country Christian School; boosting efficiency, audit readiness, and user satisfaction across departments.

"It's building my to-do list for me. As AP, I don't even need to bog down my inbox. I know exactly what needs to be done and when."

Susan Meisinger, Account Payable Clerk

With a commitment to listening, iterating, and enabling schools like LCCS to do more with less, PLANERGY proves that smart spend management is no longer a luxury – it's a necessity.

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