

EDUCATION

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PLANERGY lets us have smarter, faster conversations about budgets and spending. That's invaluable in a school environment.

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Leah Bienstock, Controller

Yeshiva Derech Hatorah is a thriving educational institution in Ohio, with multiple divisions and a deep commitment to operational excellence. Like many schools, their finance team struggled with siloed purchasing, lack of visibility across departments, and inefficient approval workflows.

When their previous procurement software was discontinued, the team, led by Controller Leah Bienstock, began the search for a modern solution. They found it in PLANERGY.



Challenges Before PLANERGY:

The limitations of the previous system created multiple bottlenecks:



No Integration with Accounting

Software: Manual re-entry of PO data slowed down processing and introduced errors.



Manual Workflows: Purchasing and approvals were email-based, leading to delays, confusion, and duplicated payments.



Fragmented Oversight: Departments had no insight into their budgets or what had been approved.



Reporting Frustrations: Pulling data required piecing together spreadsheets from different sources.

"We had departments asking, 'What's left in our budget?' and we couldn't give them a clear answer. There was no easy way to track or manage spend across the school."

Leah Bienstock, Controller

The Solution: a Centralized, Transparent P2P Platform

PLANERGY was implemented to bring structure, automation, and transparency to Yeshiva Derech Hatorah's procurement and accounts payable processes. According to Leah, implementation went smoothly, especially on the purchasing side:

Among the most praised functions:

- ✓ Department-specific budgets and approvals
- ✓ Request replication to speed up recurring orders
- ✓ Direct integration with the school's accounting software
- ✓ AP automation (currently in rollout)

"The interface is so intuitive. Our staff transitioned quickly. They love features like the search tool, which is so much more forgiving and efficient than our old system."

Leah Bienstock, Controller





Immediate Impact

1. Enhanced Budget Visibility and Accountability

Every department now sees their available budget in real time. Requesters know how much they can spend before submitting a purchase order, and approvers can make informed decisions instantly.

"It's incredibly transparent," Leah explains. "Everyone knows what's been spent and what's left. It's changed the conversations we have, earlier and more data-driven."

Leah Bienstock, Controller

2. Faster Month-End and Audit Prep

Previously, closing out the year or preparing for audits involved manually gathering documentation from scattered systems. With PLANERGY, everything is in one place.

3. Major Time Savings

From secretaries to finance staff, everyone saves time.

"What used to take hours of digging and cross-checking now takes second. Running reports, tracking expenses, spotting duplicates, it's all streamlined."

Leah Bienstock, Controller

4. Reduction in Duplicate Payments and Waste

PLANERGY has helped prevent costly errors like duplicate invoices and unnecessary purchases.

"We've definitely caught a lot of duplicate invoices thanks to PLANERGY. It's also helped us have smarter conversations about what's being purchased and whether it's really needed."

Leah Bienstock, Controller

Long-Term Benefits

Financial Control at Scale

With multiple departments and campuses, Yeshiva Derech Hatorah needed centralized financial control without limiting autonomy.

Strategic Spend Analysis and Vendor Management

While Leah doesn't manage vendors directly, PLANERGY's historical purchase data enables smarter procurement decisions.

Support That Makes a Difference

Support from the PLANERGY team, especially Customer Success Manager Lyle Del Vecchio, has made a lasting impression.

What's Next?

The team at Yeshiva Derech Hatorah is implementing full AP automation with PLANERGY's AI-driven invoice capture and three-way matching.

"We've seen the demo. It's incredible. We're moving in that direction, and we know it's going to save even more time and money."

Leah Bienstock, Controller

They're also exploring greater use of PLANERGY's advanced reporting features, including scheduled reports and price variation insights, to drive further cost efficiency.



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Our staff adapted to PLANERGY immediately. It's user-friendly and powerful. They love the search and replication features.

Leah Bienstock, Controller

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We were using another system called Easy Paper Trail. But they stopped supporting it, so we needed a new platform, something more robust. PLANERGY was it.

Leah Bienstock, Controller

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Conclusion

PLANERGY has equipped Yeshiva Derech Hatorah with the tools it needs to manage procurement and budgeting across multiple campuses efficiently and transparently. By eliminating manual processes, improving visibility, and providing reliable support, PLANERGY is helping this dynamic educational institution stay focused on what matters most, supporting its students.

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