



CASE STUDY

Spend Management FOR EDUCATION

“ **PLANERGY is a no-brainer.
Don't even look anywhere else - it just works.** ”

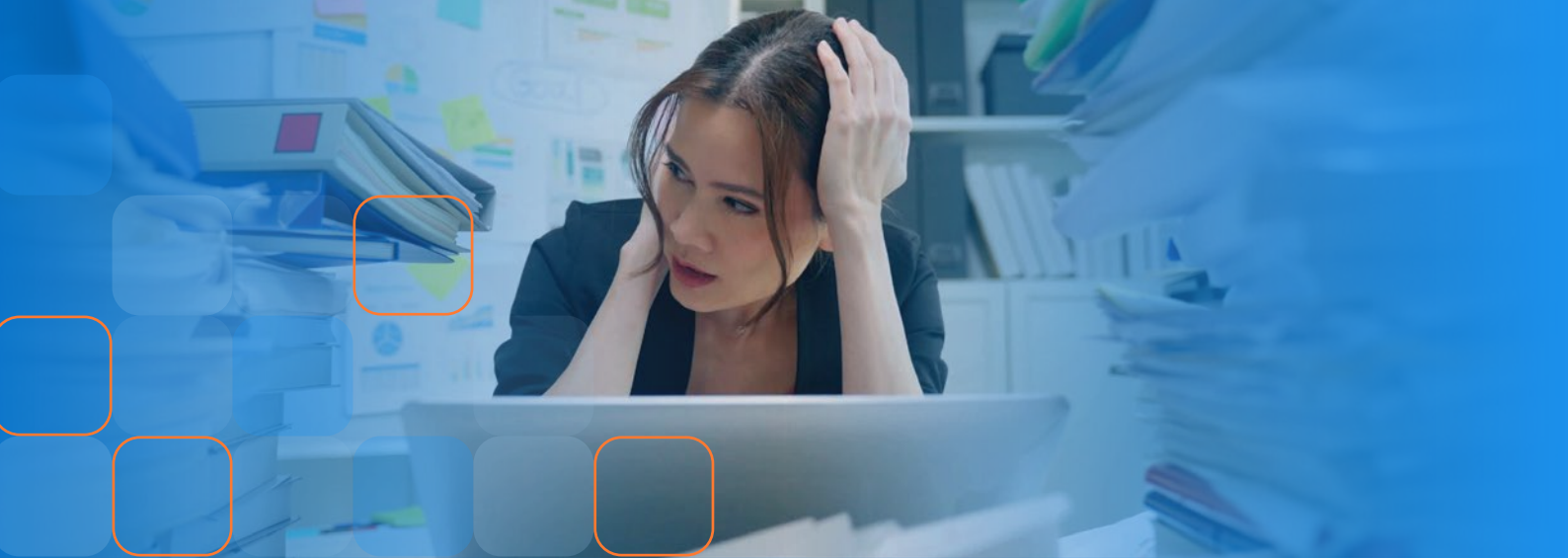
Rijk van der Merwe, Commercial Director

The White Horse Federation (WHF) is a Multi-Academy Trust with more than **30 Primary and Secondary schools** across Wiltshire and Swindon. When they began reviewing their **Purchasing and Accounts Payable** systems, one goal was clear: to bring **visibility, efficiency, and control** to every pound spent across its schools.

By adopting **PLANERGY**, White Horse Federation has unified **Procurement, Automated Accounts Payable**, and empowered its schools with real-time budget control, setting a new standard for financial efficiency in education.

For more information visit planergy.com/education

PLANERGY
For Education



The Challenge

Like many Trusts, WHF had expanded rapidly, but its financial systems hadn't kept pace. They needed a scalable, intuitive Procure-to-Pay (P2P) solution that unified purchasing, approvals, and budget visibility without burdening staff or creating hidden costs.

After reviewing several platforms, including Compleat and Sage Intact's native procurement, WHF chose **PLANERGY Spend Management** - and never looked back.



Before PLANERGY:

WHF's previous systems were fragmented and time-consuming.

Procurement ran through a mix of Sage Intacct's Purchasing module and manual processes, while invoice handling relied on external scanning providers.

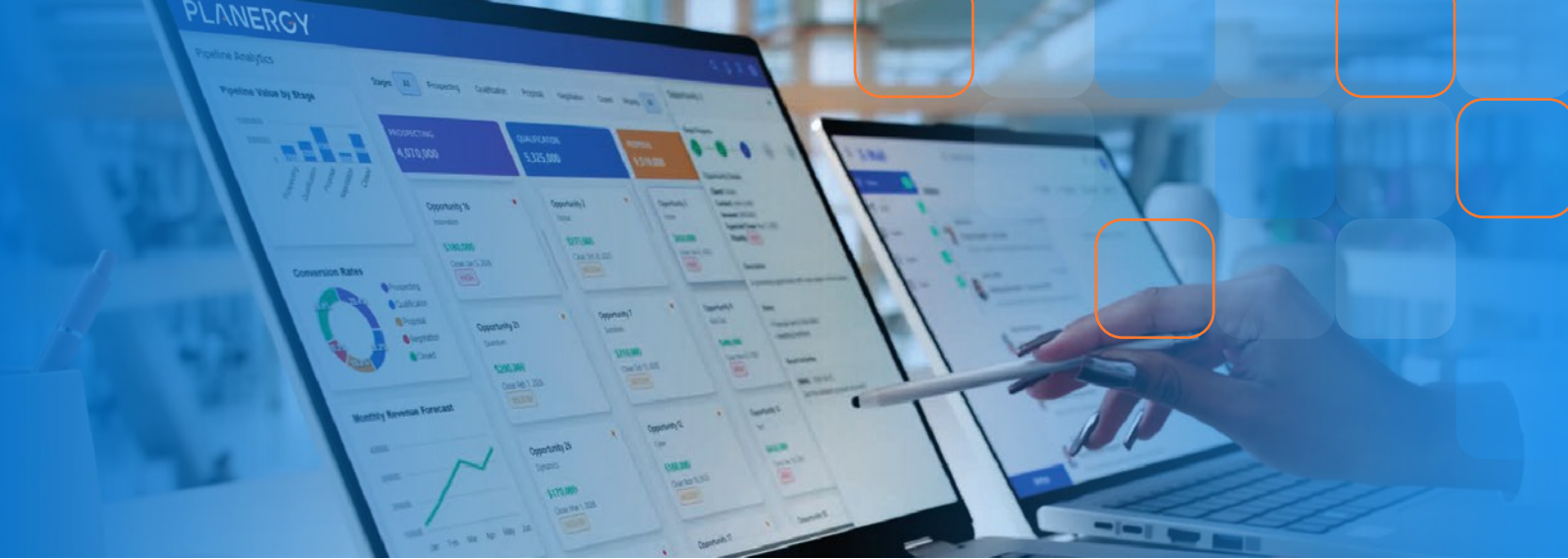
Every purchase required manual entry, and every scanned document incurred extra charges.

"We had thousands of approval rules to maintain. The system was complicated, slow, and unfit for purpose.

Invoices were sitting in queues, visibility was poor, and the team had no confidence that everything had posted correctly."

Rijk van der Merwe, Commercial

It became a huge administrative burden, users were chasing approvals, tracking missing invoices, and struggling to produce timely reports.



Choosing PLANERGY

WHF wanted a solution purpose-built for education - easy to use, fully integrated with Sage Intact, and transparently priced.

"PLANERGY is so logical. It's made by humans for humans! Everything just makes sense - departments, users, approvals - it's so intuitive. Our schools can now buy what they need, within their budgets, without waiting on central approvals."

Rijk van der Merwe, Commercial Director

PLANERGY's all-inclusive model stood out

Unlike other systems that charge per user or per document, PLANERGY's all-inclusive model stood out immediately.

It provides unlimited **Unlimited Users and Invoice Scanning** across the entire Trust.

That means Teachers, Business Managers, and Finance Teams can all participate in the purchasing process, without worrying about licensing costs.

Implementation Without the Headaches

Implementation is often the hardest part of any new system, but for WHF it was seamless.

"We rolled out PLANERGY in just a few weeks, it was so easy the staff just got it. We went live with around 400 users, and within two months processed over 3,000 orders."

Rijk van der Merwe, Commercial Director

Previous suppliers had charged tens of thousands in set-up and consulting fees.

PLANERGY's implementation was a fraction of the cost of Compleat's, and their support was exceptional. The team were patient, responsive, and always ready to help.

Immediate Impact Across the Trust

The results were immediate. Staff at every level - from administrators to headteachers - gained real-time visibility into spend, budgets, and approvals.

"The pricing structure was a revelation," vsays Rijk. "One fixed cost, unlimited users, unlimited invoice scans - no hidden fees. That's exactly what the education sector needs."

Rijk van der Merwe, Commercial Director

One of the biggest game changers has been **PunchOut purchasing**. Instead of manually rekeying supplier orders, staff can now browse preferred suppliers through **PLANERGY**, add items to their basket, and automatically create pre-coded requisitions.

"We estimate PLANERGY saves at least 20% of staff time across the Trust."

Rijk van der Merwe, Commercial Director

Full Visibility and Control

With over **30,000 invoices processed annually**, automation has delivered measurable savings and stronger financial control. PLANERGY's dashboards, approval workflows, and budget-monitoring tools give instant oversight from requisition to payment.

Our Accounts Payable team has also evolved. Instead of processing paperwork, they now manage data insights and exception reports.

Ongoing Partnership and Improvement

PLANERGY continually evolves with new feature releases such as role-based dashboards, advanced approval logic, and custom reporting.

“

They're doing less grunt work and more valuable work now. Reporting is faster, cleaner, and more meaningful, and we're seeing information we never had before.

”

Rik van der Merwe, Commercial Director

“

Our approvers love the departmental budget dashboard.

They can see exactly what's been spent, what's committed, and what's left. In real time.

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Rik van der Merwe, Commercial Director

Seamless Integration with Sage Intacct

Integration between PLANERGY and Sage Intacct has been effortless. Data flows automatically, with invoices and journals posting directly and accurately.

“It just works,” says Rijk. “That’s the difference. Other integrations we’ve used were unreliable and slow. PLANERGY’s Sage Intacct connection is seamless, it’s a huge advantage.”

“The continuous development gives us real confidence,” says Rijk. “You can see they’re always improving the product. It’s evolving with us.”

PLANERGY’s Support

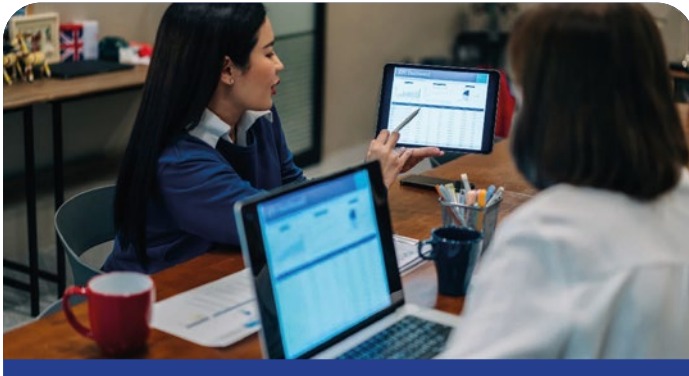
“

Customer Love isn't just a PLANERGY slogan.

It's real. The support we've received has been brilliant.

”

Rik van der Merwe, Commercial Director



Approvals, accruals, and budgets stay perfectly aligned, making Month End reporting much faster, efficient and accurate across multiple schools.

Key Results

- 400+ users onboarded seamlessly
- 30,000+ invoices process per year
- Seamless integration with Sage Intacct
- Unlimited Users and Invoices
- Real-time dashboards for Spend, Budgets, and Approvals
- 20% staff time saved through automation and PunchOut ordering

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