

Berwick Retirement Communities

Case Study



A growing retirement homes builder and operator digitizes vendor invoice processing to streamline accounting procedures, improve internal communication and optimize organizational success



"DocuWare is keeping us more organized. We can see exactly how many invoices are awaiting approval and we can now remind managers to approve them. Our Chief Operating Officer can remotely view and compare past invoice amounts and plan for future budgeting."

Jenny Jessa, Accountant
Berwick Retirement Communities, Victoria, BC



Berwick Retirement Communities

- **Country:** Canada
- **Industry:** Retirement Homes
- **Deployment:** On-Premises
- **Department(s):** Finance

Vibrant and sustainable residential retirement communities

Family owned since 1989, Berwick Retirement Communities builds and manages retirement homes in British Columbia, Canada. To operate its six homes, the company employs 1400 vendors and processes about 800 invoices a month for catering, housekeeping, personal care and nursing supplies and other essentials.

Streamlining invoice processing

"Our people no longer have to deal with a bunch of paper on their desks."

With six retirement homes to operate and more being built, plus two head offices in different locations, Berwick had a complex process of vendor invoice approvals and payments. To collect the necessary signatures and approvals, the invoices had to circulate between different offices, in paper or email form. Often, several copies were

made in different locations adding unnecessary redundancy and complexity. Staff had to call different offices to locate the invoices and ensure all signatures were collected. Sometimes when vendors called to inquire about payments, Berwick personnel weren't able to locate specific invoices and had to contact other offices to track down the missing paperwork.

"We would end up having several copies of invoices in mail or email form", says Jessa—but that still did not mean that the invoice would be easy to find when needed. "Sometimes a vendor would call and ask, 'Where is my payment on this invoice', and we didn't know where the invoice was. We needed to improve our workflow process."

Easy switchover and a dedicated DocuWare support person

The company purchased DocuWare in 2018 and switched over in November that year. Due to Berwick's specific requirements, the DocuWare accounting module had to be customized to fit the company's data entry needs. DocuWare specialists helped Berwick build their customized version of the accounting system. The training and switchover process was smooth and easy. The company also values having a dedicated DocuWare support person who is responsive and knowledgeable. "I feel like I know him personally," Jessa says. "He is always there and he responds to my emails usually within a day."

"The point of having DocuWare was to improve our workflow process. It allows us to have one system and know where all our invoices are at every stage."

Digitizing records improves organization and communication

Installing DocuWare allowed Berwick personnel to digitize all invoice processing. Staff can now pull up multiple invoices on the screen, add notes to an invoice, or compare current invoice amounts to those from previous months to ensure correct sums. DocuWare allowed for better transparency in locating invoices and accessing them remotely from other locations. "Our COO can access invoices from his home office in Vancouver," Jessa says.

Company personnel appreciate that DocuWare helped relieve them of paper clutter. "We no longer have to worry about things like, 'Oh, I accidentally filed that paper into the shredding box,'" Jessa says. The company shredded about 90 boxes of paper accumulated over a few years.

Currently, Berwick maintains 7,677 digitized documents with plans to expand this.



More business aspects to digitize

“We shredded 90 boxes of paper accumulated over several years. Now we never have to call each other looking for an invoice.”

future.”

Berwick has a construction arm that builds retirement homes and other dwellings. Following the invoicing setup success, the company plans to digitize other business aspects, including building permits, construction documents and tenant agreements as well as repairs and maintenance contracts. “We are growing,” says Jessa, “so we plan to add more documents to DocuWare in the



This document can also be found here:

<http://pub.docuware.com/en/berwick-retirement-communities>

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