

Not-for-profit Transforms Arctic Finance with AP Automation



Industry: Non-Profit/
Charitable

Location: Clyde River,
Nunavut, Canada

Employees: 60

Invoices: 251-500/month

ERP: NetSuite

Previous Pain Points

- > Cumbersome paper-based documentation and invoicing
- > Inefficient and complex approval processes
- > Varying and inconsistent invoice amounts

Ilisaqsivik Society, situated in the remote Arctic community of Clyde River, is an Inuit-led not-for-profit charity dedicated to meeting diverse Inuit community needs throughout the northeastern territory of Canada. The organization enhances individual Inuit well-being by offering essential services, including a library, school breakfast program, and counseling in the Inuktitut.



The Challenge

Lisa Morel-Misener, a virtual CFO, and Sandy Berry, a remote Finance Manager, faced significant challenges in managing financial responsibilities including:

- Using a paper-based system for reporting on 50+ projects, operational costs, contract labor, and other expenses.
- Multiple approvers, divisions, and products, requiring extra time and adding complexity.
- Invoice numbers fluctuated widely due to seasonal changes and increased programming activities.

Recognizing the need for improvement, Lisa and Sandy sought to streamline and boost the effectiveness of their financial operations.

✓ The Solution

Ilisaqsivik had already been exploring digital solutions for a year when they asked Big Bang, their NetSuite IT consultant and Yooz partner, to help investigate compatible automation software.

Key factors required included:

- Seamless alignment with NetSuite
- Streamlined data entry
- Cost-effectiveness
- Time-saving features
- Ability to attach supporting documentation

Once Yooz was chosen, the implementation was completed in just six months. This included comprehensive training sessions for the managers.

"I love that Yooz provides a fantastic clear and robust audit trail for all transactions. I love to know that our auditors can access proof of our controls and the flexibility to grant access to any tax auditor. Furthermore, Yooz enables the review of any transaction for anyone who steps into my role, ensuring transparency and accountability."

Lisa Morel-Misener, Chief Financial Officer



The Future

The Yooz solution proved to be game-changing, simplifying documentation and approval processes. As a manager involved in regular invoice reviews and approvals, Morel-Misener expressed *"The new system is incredibly efficient, likely reducing my time spent by 75%. Amazing!"*

Equally crucial, all users were pleased with the new workflows. Morel-Misener emphasized, *"Eliminating the drudgery of data entry allows us to assign employees more meaningful work."* Berry agreed, stating, *"The system is very user-friendly and employees were able to catch on quickly."*

The approval process is optimized for greater efficiency, with a robust audit trail and easy access for reviewing invoices and outstanding tasks. Furthermore, integrating Yooz into their approval processes ensured data security, safeguarding less tech-savvy individuals from fraud.