

Canadian Not-For-Profit Partnership: UNITI's AP Process is Fully Modernized Thanks to Yooz and Cantatus



Industry: Non Profit

Location: Canada

Invoices: 200/month

ERP: Sage Intacct

Yooz Partner: Cantatus

"Everything's transparent. All the invoices and paperwork are all there and readily available. Really, what is important to us is, like I said, to be good stewards of the funds that we have. And in our audits this year was so smooth."

Ellen Powell, Director

⊗ Previous Pain Points

Complex & timely invoice approval processes

Document storage & inefficient access

Lack of visibility & access to data

✓ The Yooz Solution

All-in-one AI-powered platform provides streamlined and consolidated processes

Centralized, cloud-based data storage with 24/7 remote access from anywhere.

Transparent process; full accountability for department management.

Semiahmoo Foundation is a Canadian not-for-profit organization that forms part of the UNITI partnership and charities, alongside two other affiliated societies: Semiahmoo House Society and Peninsula Estates Housing Society.

The foundation was established in 1990 to support an inclusive community by providing UNITI with the essential recognition, relationships, and resources needed to provide important services.

These three societies work closely together to deliver vital services.

⊗ The Challenge

According to Ellen Powell, Director at The Semiahmoo Foundation, *"We started to realize that we had a lot more financial and reporting needs that weren't being met by (the current) accounting system."* With different entities and numerous intercompany transactions, the organization needed an efficient and transparent process capable of managing accounting variances, consolidating financial statements, and ensuring business continuity and adaptability in the new work environments.

To compound the accounting process problems, the employees were working remotely, and the group homes were isolated. There was no way to effectively circulate paper for approval, not in a timely manner.

Knowing that it would take a tailored solution to help resolve these (and other) issues, UNITI reached out to their longtime partner Cantatus – a full-service, Canadian-based managed service provider – for assistance.

Cantatus dedicated extensive time learning about both the "whys" and "hows" of UNITI's AP process before recommending Yooz as the ideal Sage-integrated AP automation software partner.

✓ The Solution

The advanced Yooz automation platform was easily able to accommodate all the variances between the three entities, harmonizing them to roll up into a single source of truth. Both time savings and ease of implementation were key factors, allowing for easy tracking and reporting of funds.

The Yooz system also made the AP process easy and user-friendly, allowing employees to focus on the organization's mission. Powell stated *"... I work with a bunch of people who are basically social worker backgrounds – people helpers – and they're not geared or oriented towards anything financial, but they picked (the system) up and are using it. And they learned it without hardly any help. Not a lot of troubleshooting. So, it was really, really smooth."*

With UNITI's culture of accountability, this meant that the people who knew the most about what was going on were also the ones empowered to make decisions.



The Future

UNITI continues to rely on Cantatus as an advisory service. And they continue to count on Sage Intacct and Yooz to power their Accounts Payable process.

For a company directly involved with people, freeing themselves from the paperwork and office tasks means having the time – and funds – to do more for the community.



Watch the interview

Cantatus Systems Group Inc.: a trusted Yooz business partner.



Cantatus Systems Group Inc. is a full-service, Canadian-based managed services provider and Sage Intacct business partner. They offer in-depth expertise in designing, implementing, and supporting advanced software and hardware solutions onsite and in the cloud.

Combining the very best IT solutions available with their in-house experts and extensive knowledge of accounting systems, Cantatus delivers a comprehensive, proactive plan designed to keep organizations secure.