

Dext

Case Study

AMLB and Pancreatic Cancer Canada

Harnessing the power of cloud accounting to deliver value to mission-driven businesses

How Pancreatic Cancer Canada reaches new heights with AMLB and Dext



Dext has helped us and our clients simplify and automate accounts payable and expense report creation processes. It has significantly increased data accuracy, allowed for easy access to supporting documents during year-end audits and reduced processing time by 80%. All of this means our clients can now spend more time scaling their businesses or in the community doing work they are truly passionate about. Dext has truly been a game-changer for us and our clients!.”



Moez Bawania
Co-Founder, AMLB



Introduction

For Pancreatic Cancer Canada and AMLB, Dext has provided a massive boost in efficiency to their workflows allowing them to spend less time on their finances and more time achieving their goals.



About PCC

Pancreatic Cancer Canada (“PCC”) prides itself on being a leading organization in its field. So when AMLB, their virtual CFO partner, approached them about simplifying and automating their accounts payable process, they were excited about it. They are continually evaluating ways to improve operational efficiency, allowing their team members to concentrate on what matters: raising awareness and enabling education and support to improve patient outcomes.



What Dext Provided for PCC

To help them reach their goals, AMLB onboarded Pancreatic Cancer Canada onto Dext Prepare. Scott Nisbet, Operations Manager at PCC, shared the following: “Using Dext Prepare has helped us eliminate repetitive data entry, increase data accuracy, and simplify the expense report creation process. Before using Dext, we were using a spreadsheet template to create payment requisitions which meant for every invoice, we had a requisition template that needed to be filled out. We had to enter the vendor name, invoice date, and amount manually. With our new process, we simply email in or upload to Dext all invoices that need to be paid or have already been paid. Remarkably, usually within an hour, all key information from these documents, like vendor name, invoice date, amount, and even sales tax has been extracted in a format that can easily be imported into QuickBooks.”

Dext also does a great job of passing along supporting documents to QuickBooks, according to the PCC team. PCC experienced an audit and when the process occurred, Dext made it seamless and painless. Since the invoices were all stored in QuickBooks, the team did not have to search for them. Scott shared, “this has saved us at least 50 hours and made life a lot easier particularly during the pandemic when we’re not able to be in-person to easily hand information to our auditors. The auditors actually complimented our process and said it was one of the easiest audits for them given how seamlessly and quickly they could locate supporting documents!”



For AMLB Dext Prepare provides them the tools they need to help increase the efficiency of their clients and focus on the development of their businesses.”



Scott's Advice for Future Dext Users

As an innovative organization, Scott and the entire PCC team were excited to use a tool that they expected would result in greater efficiency and accuracy. Scott shared the following for those looking to bring in new technology to boost productivity: “Our biggest learning was to start with our process and stakeholder needs before jumping straight into technology. Technology is great but you really have to understand what the output needs to be and why it's needed. Then, you can work backward to figure out what inputs you need from whom, how technology can help you obtain those inputs and transform them into the desired outputs with the least amount of steps and friction.”

In addition, Scott discusses how he has been able to get new staff into Dext and get them excited about it. “When training new staff, I've basically put into one document all the information I initially received from our CFO firm, AMLB, along with key insights I learned as we went along, and passed this document along to new users. As importantly, I reinforce the value of such a tool, how it will benefit them, and that I am with them every step of the way, especially in the first couple of weeks when they will have a lot of questions.”



More About AMLBs Approach

As a virtual outsourced CFO business, AMLB provides an outsourced finance function for growth-oriented businesses and non-profits across Canada to help them achieve their goals without worrying about setting up an internal finance department. AMLB's client portfolio consists of 25+ high-performing organizations for whom they act as Controller or CFO and take care of all their needs while offering unlimited support throughout the year, which means they become the financial partner enabling their clients to reach their goals.

Ready to grow your practice?

Dext helps your practice become more productive. Speak with one of our product experts today.

dext.com/consultation

