Beanworks
ACCOUNTING EVOLVED

Lexington Country Club

Lexington Country Club is a picturesque private community in Southwest Florida with more than 1400 residents living in two distinct neighborhood villages. With club facilities spread out across 454 acres, residents have access to an 18-hole championship course, tennis courts, swimming pools, bocce courts, and the main clubhouse, which acts a central meeting point and hosts many lavish private functions each year.

Since breaking ground in 1995, Lexington Country Club has steadily expanded through construction projects over the years, including new villa and condo developments. As their facilities grew, so did the volume of paper invoices processed by the club each week. Lexington Country Club's controller Leslie King recognized the issue and began to search for a solution.

Sped up invoice approval delays
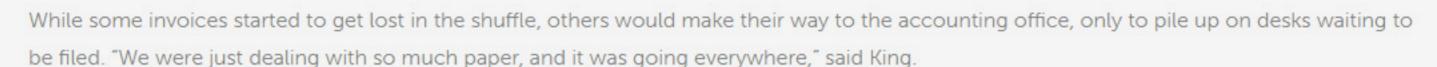With instant invoice routing and remote access

Simplified document management
By eliminating paper from the AP process

⚠ Challenge

While some invoices started to get lost in the shuffle, others would make their way to the accounting office, only to pile up on desks waiting to be filed. "We were just dealing with so much paper, and it was going everywhere," said King.

The other problem was in closing the books at year-end. Before each close, King would remind department heads to submit their remaining invoices. Inevitably a few months later, a missing invoice would reappear. "Well, I've closed the year already," said King. "Now, I've got to post this to the new budget, and I didn't like that."

Decision Making

King kicked off the research into an accounts payable (AP) solution by reaching out to EZclubAP for a product demo. "I brought my staff in on it, the ones who were going to be working primarily with it, and showed them the demo.," said King. "They got on board right away." Above all, her staff wanted a solution that provided ease of use. "They didn't want me to go out and buy a system that was really complicated, or that they couldn't easily teach other staff how to use."

For King, Beanworks provided exactly the features she needed, as it would store all her AP documents, track invoice progression, and integrate seamlessly with their accounting system, Jonas.

⚙ Implementation

While King's team initially planned on taking a month to fully implement Beanworks, in practice, the transition took only about a week. Lexington Country Club was also able to set up their Beanworks instance to accommodate separate entities for each of the club's properties. "Everybody at Beanworks was so helpful with setting that up, importing our GL numbers, and making sure that all the odd things that are unique to us worked well."

🏆 Achievements

With Beanworks, invoice approval delays have been significantly cut. For example, in one of the condo associations that the club manages, all invoices are approved by a Treasurer who travels frequently. In the past, the condo association would have had to delegate the task or delay approvals until her return. As a cloud-based solution, Beanworks makes it possible to complete approvals remotely. "Last month, the Treasurer was on a cruise ship in Alaska, where she logged on to her computer, brought up Beanworks, and approved the invoices that way," recalled King, who uses the remote access feature to approve check runs from home. "Beanworks has really simplified that process. There's no more delay."

There have been noticeable process improvements in other areas of the business as well. "We buy a lot of capital purchases and I have to keep those invoices in a separate place," said King. "Before I used to go find the file, pull it out, unstaple it, photocopy that invoice, and scan it to myself. Now I can just find that invoice in Beanworks."

The real test for King happened after Hurricane Irma passed through the state of Florida, forcing residents and staff at Lexington Country Club to temporarily evacuate. "A week after the hurricane, I was the only one back in the office. All of my people were stranded and I had to do a check run. I had never done it before—all I had seen was that demo, years ago." Without training, King succeeded in her task. "I applaud Beanworks for making it that simple."

Thinking back to the time before Beanworks, King is adamant. "I just don't know why everybody isn't using Beanworks, because I can't imagine going back to the way we did it before. I can't say enough good things about it."