

# How AAWA saved 12 hours of expense admin a week with Weel

With Keval Shah, Accountant

## The challenge

For a long-time senior Accountant Keval Shah had known that something had to be done about AAWA’s manual expense management process.

Each week, the finance team was withdrawing cash from an ATM, separating it into envelopes for each house and personally delivering each envelope to 60 houses across Perth.

The caregivers, focused on providing quality care, would spend the petty cash on fuel, groceries and activities for their clients. Once a transaction was made they were required to collect each receipt, complete a hard-copy expense report (a printed Excel spreadsheet) and give it to their house manager for approval.

Once the spreadsheet was approved everything would be mailed back to the head office at the end of each week.

When the expense reports arrived at head office, a member of the finance team was responsible for painstakingly calculating GST on every transaction and typing all expense information into Microsoft Dynamics for reconciliation. This would take the staff member 2 days each week and in Keval’s words “was a complete waste of time”.

Moreover, the manual process created room for human-error which meant that expense reports would often come back with incorrect information or missing receipts. Calls would have to be made to staff members and information re-entered by the finance team.

Worst of all, AAWA’s caregivers were frustrated.

*"Our Caregivers are hired to take care of people in the community with Autism, not complete expense reports."*  
- Keval Shah

This process was distracting them from supporting their clients and their client’s families.

## The solution

A powerful expense app that removes busy work through automation

Knowing full-well that the process he helped build had broken-down, Keval had been looking for “anything to make life easier for the team”. However, nothing Keval saw quite hit the mark. That was, until he discovered Weel.

Keval was able to replace his old process in less than a week. From Weel’s web platform Keval was able to instantly issue a unique virtual card to each caregiver and use Weel’s budgets to track spending and enforce card limits in real-time. Whenever cards are running low Keval can top them up with the click of a button.

Using Weel’s custom fields, Keval was able to build a better approval process for the house managers who can now filter transactions and mark them with ‘Reviewed’ or ‘Follow-up required’ online.

The hard-copy expense reports and folders of receipts have been replaced by a user-friendly mobile app that caregivers use to quickly access their virtual corporate cards and take photos of their receipts. Weel’s expense reports eliminate busy work by automatically populating expense category, GST and all merchant data.

Because all expense data is stored on Weel’s live transaction feed in real-time, the finance team are able to export approved transactions into Microsoft Dynamics in just a couple of clicks.

## The result

12 hours of expense admin saved each week, allowing the team to continue focusing on client outcomes.

In less than a week, Keval was able to completely revolutionise AAWA’s expense process. The 2 days (16 hours) spent processing transactions every week has been reduced to just 4 hours a week and the follow up calls have stopped. This has freed up Keval’s snowed-under team to work on higher impact tasks like forecasting and budgeting.

Being able to remove the petty cash process has meant that the finance team no longer have to withdraw and hand deliver petty cash to each house. Giving the finance team some much needed time back in their busy schedules. It has also provided an added saving on the fuel used to deliver the cash.

However, out of everyone, the caregivers have been the happiest with the change.

“Maintaining receipts and completing expense reports in Excel was an added headache for our caregivers. Now that it is streamlined and easy they don’t even have to think about it.”

### Company

The Autism Association of Western Australia (AAWA) provides 24 hour care to people living with Autism. Many of AAWA’s clients live in houses with full-time caregivers who help them live a life like anyone else.



### Location

Perth, Western Australia

### Industry

Nonprofit - Disability Care

### Challenges

- Inefficient petty cash delivery
- Paper-based expense reports
- Manual accounting data entry
- Missing receipts and follow-ups