

CUSTOMER STORY

Automating the Expense Reimbursement Process

Bergamo Montessori School was tired of wasting time manually processing receipts. They used Formstack to launch a fully automated expense reimbursement process that saved them time, money, and resources.



Bergamo Montessori Schools

Founded in 1975, the Bergamo Montessori School is the oldest Montessori school in the Sacramento region and educates 500 students between the ages of 3 months and 12 years.

Industry	Customer Since
Early Education	2013

Use Case	Products
Office Administration - Expense Reimbursement	Forms

Features
Workflows, No-Code Integrations, Email Confirmations and Notifications

[Visit Website](#)

Challenge

Admins were spending countless hours sorting through receipts manually sent in by staff. Each receipt had to be hand-coded, and many were rejected due to missing information. It was all paper-based, leading to a slow, inefficient, and inconvenient process.

Countless hours
spent on manual sorting and hand-coding for paper-based receipts

Solution

The school created a fully digital reimbursement process that accepts photos of multiple receipts at once. Using Forms Workflows, the employee's director approves the submission before it is sent to finance. An automated email is sent to the submitter once the reimbursement is approved or denied. Final PDF documentation and data is transferred to Dropbox and Google Sheets for easy tracking, storing, and archiving.

“

I chose Formstack because it blended a logical and easy-to-use interface with the robust features needed for a modern administrative office.



Matt Hillis

Executive Director at Bergamo Montessori School

The Results



Improved tracking and archiving of receipts



Eliminated need for an additional administrative assistant



Replaced paper checks with direct deposit



Expanded submission window beyond traditional business hours



Allowed for reimbursement requests to be made from a phone, computer, or desktop



Eliminated paper completely from the process