

Report

# 6 Questions to Ask Before Automating AP

What to ask before investing in software to  
automate accounts payable



## Automating Accounts Payable

Given the competitive landscape of accounts payable automation and the number of software companies offering a solution, it might be good to consider what your needs are in the context of your particular organization.

By asking these questions you'll get an idea of what to look for in the solutions you're considering.

1

### Q: How much time do you spend entering and processing vendor invoices?

**A:** Many organizations are automating in order to eliminate the manual data entry and processing of vendor invoices. Whether you do it yourself or you have staff that does it, keying in invoice data is resource and time intensive. And if your company grows you have to add more people for manual tasks such as this.

If you receive invoices by email then look for a solution that automates data capture. That means that once the vendor sends the invoice, the system will capture the invoice data and populate the data fields in a central dashboard.

If you still get paper invoices, make sure the system accepts scanned images the system can extract data from.

## 6 KEY QUESTIONS for AP AUTOMATION

### APPROVAL WORKFLOW?

Get visibility into bottlenecks

### AUDITS?

Save time

### SEARCHING FOR INVOICES?

Find invoices quickly

### DATA ENTRY AND PROCESSING?

Eliminate manual work

### RECURRING INVOICES?

Reduce workload

### PO MATCHING?

Automate matching





## 6 Questions to Ask Before Automating AP

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### Q: Do you have visibility into invoice approvals after they have been sent?

**A:** Most AP automation solutions offer approval workflow, where invoices are sent out in a pre-determined workflow to the people who approve the purchase.

You can see where the invoices are in the approval cycle – and where the bottlenecks are.

Do you have many levels of approval, or is there just a small set of approvers who need to be part of the system?

Knowing this will steer you in the direction of the right system for that number of users. Look for “unlimited users” to avoid costly licensing fees.



3

### Q: Do you have PO invoices?

**A:** If you have PO invoices, you will most likely consider automated PO matching. That means the software looks at the purchase order and the invoice, and depending on the variances you set, will match the invoice to the PO and send the invoice to your ERP or accounting system for payment.

If there is no match, the system should send the exception to the appropriate approver with all the information necessary to clear it.

Intelligent AP automation software will do a 3 way match as well, matching the invoice, the PO and the goods receipt.

4

### Q: Do you have recurring invoices?

**A:** Companies are not only looking to manage incoming supplier invoices, but recurring invoices as well. These are invoices for services that are billed on a periodic basis.

Consider a software solution that matches service contracts to recurring invoices. That way you get notifications when contracts are about to expire and have a system to coordinate ongoing approvals for this type of purchase.

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### Q: Do you search for paid and current invoices?

**A:** A robust AP automation solution will let you search for any data on vendor invoices that are in the system or already paid.

It's best to have a searchable invoice archive in the cloud that relieves the burden of multiple file folders in Dropbox or storing invoices physically in boxes.

6

### Q: Are you subject to external and internal audits?

**A:** Audits are very time consuming and can eat up resources. Make sure you have a complete time-stamped audit trail that records all the tasks finance administrators and approvers perform.

If your organization has many entities and/or locations, make sure the software can handle that level of complexity.

Different tax jurisdictions and currencies can be a challenge as well. This is another area the solution should be able to handle.

## Consider Rillion

Rillion has solutions for both large and small organizations. We've matched the best features to give what you need in AP automation, nothing more, nothing less.

### Small Business

#### Rillion One

##### Invoice Capture

Automated invoice data capture for both email and paper invoices.

##### Approval Workflow

Approval workflow to all the members of your team.

##### Audit and Archive

A time-stamped audit system and searchable invoice archive.

##### Fast Integration & Setup

Get up and running quickly with fast integration to your accounting system.

### Larger Business

#### Rillion Prime

##### Invoice Capture

Invoice data capture for larger volume email and paper invoices.

##### Approval Workflow

Approval workflows for more complex organizations.

##### PO Matching

Automatically matches POs with invoices and goods receipts.

##### Recurring Invoices

Manage service contracts and periodic invoices.

##### Audit and Archive

Auditing function for multiple locations and entities.

##### Seamless Integration

Integrates with popular ERPs.





## 6 Questions to Ask Before Automating AP

### Integration

The data integration process can often seem overwhelming. Our industry standard Rillion Integration Engine alleviates this burden with powerful integration capabilities built into a straightforward, easy-to-use graphical user interface.

Rillion has over 3,000 installed clients globally, all connected to one or more ERP, purchasing, or accounting system. The Rillion Integration Engine interface offers several options to facilitate communications and data sharing between Rillion and your business system.



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★★★★★  
“Easy to Use.”

96%  
User Satisfaction Ratings

Ap Automation with Rillion saves time, lowers costs and improves efficiency for over 3,000 clients worldwide.

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