

**Never automate a bad process.** This is the opportunity to get it right. Design the process from the ground up using industry best practices. It rarely makes sense to extensively customize an off-the-shelf AP automation solution. *Key requirement: Select solutions that are highly configurable. The best solutions provide the ability to selectively turn functionality on and off according to responsibility or role, right through the UI.*

**Clean up your supplier data.** Data contained in your ERP's address book and other financial systems drive the AP automation solution. AP automation uses OCR (optical character recognition) and relies on clean supplier data when matching suppliers to invoices. Clean and accurate data in your address book will improve the success of OCR and speed up the approval process. *Key requirement: Only consider solutions that have a supplier portal. This shifts the burden to the supplier to monitor their data for accuracy.*

**Embrace a one-touch philosophy.** Manual processes often involve back and forth interaction as invoices traverse the coding and approval process. For instance, an AP staff member might first reach to get approval for an invoice, then identify where to code the expense, then route the coded invoice back to the ERP for update and archival. Instead, AP should simply review the invoice and route for coding, approval and archival. *Key requirement: The best solutions provide the ability to create finely tuned workflows that ensure one-touch processing.*

**Save a forest and ban paper.** When you receive paper invoices, immediately scan them into your AP automation solution. Don't continue to pass them around for coding and approvals. Paper provides no visibility into processing time and no analytic insight. *Key requirement: Some invoice layouts are difficult for OCR. Select an AP automation vendor that allows submission of invoices for training. The best ones bundle this service into your processing fee.*

**Eliminate filing cabinets.** Scanning invoices means no more paper...and no more paper means no need for filing cabinets. Shred those invoices and recycle the paper. Digitized images of invoices are archived in your ERP system. Simply click on an entry in your AP ledger and instantly pull up the invoice image. *Key requirement: Select a vendor that archives images for at least seven years. It should be part of the service, not an additional charge.*

**Size doesn't matter.** Whether you are processing 500 invoice a month or 50,000 there is value in automation. Gains may be more pronounced as volume increases, but the ROI on AP automation is relatively consistent. *Key requirement: Select a vendor that prices based on the number of invoices, not the number of users. This makes automation affordable even at low volumes.*

**Put the system to work for you.** AP automation should deliver more than just faster processing and fewer errors. The data contained in the system should enable you to proactively identify bottlenecks, pinpoint problematic invoices, and help you take better advantage of prompt payment discounts. *Key requirement: Select a solution that provides embedded analytics, with flexible dashboard layouts. Installing and building an analytic solution on top of an AP automation platform is expensive and time consuming.*