

ESSENTIAL CHECKLIST

AP AUTOMATION

20 Questions to Ask When
Considering an AP Automation
Solution

The use case for improving your AP processes is different for every company, based on available resources, technology landscape and realistically achievable levels of automation. This checklist guide will provide you with a complete list of questions on product features, security performance and other services to ask AP solution vendors, when considering if they are the right match for your requirements.

Features

- What ERP or Accounting Management Systems does your solution integrate with?
- How many clients have you implemented with (your ERP)?
- Is your solution on-premises or cloud-based?
- How does your platform intake, process, code, route for approval, and pay invoices? Are any of these functions outsourced? If so, which ones?
- Does your platform utilize outsourcing or document recognition technologies?
- How does your solution leverage optical character recognition (OCR), artificial intelligence (AI), machine learning, and robotic process automation (RPA)?
- Does your firm's platform accommodate purchase orders and purchase requisitions? How does it handle matching functionality or inventory?
- Given our invoice processing workflow, how would your solution automate? How does it handle complete approval workflows? What if an employee is on PTO; how are approvals re-routed?
- During the approval processing, can approvers fix a coding error if AP staff codes incorrectly?
- What security measures are in place to prevent an employee from committing fraud or changing data that should not be changed?

- Is your firm SOC2 TYPE-2 compliant to ensure the confidentiality and security of our data?
- Does your platform undergo regular testing for vulnerabilities by external auditors to prevent security breaches?
- Are your clients' data stored on a shared database or distinct database of each client?
- What are the options your approval workflow offers?
- How are duplicate invoices handled?
- What invoice formats are accepted, and how?
- Given my company's invoice volume how does this affect pricing? Is your pricing feature and functionality based?
- Do you offer a complete solution, or do you offer add-on modules?
- What is the average time to implement and deploy? What are the biggest challenges with implementation?
- Do you have any customer references that we could see about your platform?

Ready to learn more? Schedule a no obligation pre-consultation call with us to learn how to improve your secure print management experience!

[Book a Meeting Now](#)

About Process Fusion

Process Fusion is a digital transformation cloud solutions innovator. We help organizations to create and integrate the best cloud technologies to simplify their digital transformation experience.

Contact:

3250 Bloor Street West
Suite 1000, East Tower
Toronto, Ontario, Canada
M8X 2X9

Worldwide: +1 (416) 503-9800
processfusion.com

