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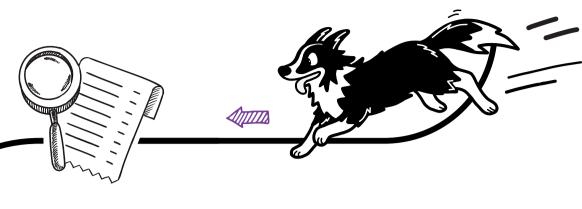
The Road to AP Automation

Six key steps to streamline your AP process.

1 Evaluate Your AP Process

There are 3 key process development tasks that can help you improve AP operations:

1. Review your AP process, with a focus on creating streamlined operations and eliminating unnecessary tasks.
2. Determine the most efficient way to organize and divide invoice processing activities.
3. Plan how you will implement controls and compliance over the entire AP process.

2 Transform Paper Invoices to Digital

E-invoices are the ideal solution for moving from a paper to a digital AP process. In addition to this, there are two ways to digitize invoices:

1. **OCR tool:** Optical character recognition software captures characters in paper and PDF invoices.
2. **CaaS:** Capture as a Service outsources the entire process of digitizing and validating the invoices.

3 Review Implications from the IT Perspective

IT is critical to ensuring that cloud-based AP solutions and upgrades are aligned with the organization's technology strategy and existing architecture. These are the key IT considerations for cloud solutions:

1. **Implementation:** IT saves time implementing cloud-based AP automation because of the simple deployment without any extraneous IT support required.
2. **Operations:** System maintenance, security, and monitoring are included.
3. **Dynamics upgrades:** Validated plug-and-play version of your AP automation software delivered to your LCS.

4 Bring the Value of AP Automation to Your Organization

How do you successfully make the transition to AP automation across your organization?

1. Engage usage early and often
2. Ensure the team is comfortable with the tool
3. Explain what the change will mean for everyone

5 Make Invoice Review & Approval Intuitive

The success of invoice automation depends on how timely and efficiently your team can review invoices. You can improve this process by:

1. Automating the matching and approval of PO-based and recurring invoices
2. Ensuring your solution offers mobile capabilities to support remote work
3. Routing only the invoices that require approval before payment
4. Handling minor purchases within the travel expense process
5. Avoiding splitting approvals between several persons

6 Consider the Future of AP Automation

Stay on top of the key AP developments to leverage the latest technologies and gain critical business benefits.

1. E-invoicing can revolutionize the way we work
2. Robotic process automation takes on labor-intensive tasks
3. Artificial intelligence makes AP systems smarter
4. Usability is a must-have capability
5. Mobility enables productivity anywhere, anytime

See how Dooap can improve the efficiency of your accounts payable process with automation.

Get a Demo

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