The Enterprise AP Buyer's
checklist

As you assess your enterprise requirements, this checklist helps you evaluate AP automation solutions across your organization's stakeholders and their unique needs.

AP Team

- ☐ Will it cut down the manual exceptions we touch every day?
- ☐ Does it scan invoices at the line-level?
- ☐ What about 3-way match? Can it handle long, complex invoices?
- ☐ Can it auto-code non-PO invoices (the messy ones)?
- ☐ How strong is duplicate detection - across all systems, not just ERP?
- ☐ How does it help speed up the close process and aging reports?
- ☐ Does it reduce vendor emails and inquiries?

IT Team

- ☐ Is it natively integrated with our ERP - or will we be building bridges?
- ☐ Does it support SSO and keep data encrypted at rest and in transit?
- ☐ Will it shrink the number of bolt-on tools we maintain?
- ☐ How does it scale with multi-ERP or multi-entity setups?

Procurement Team

- ☐ Can it work alongside my Ariba/Coupa network? Or is it going to cause confusion?
- ☐ Does it push more spend into our P2P platform, not less?
- ☐ Can it help me build spend cubes?
- ☐ Will it give us cleaner data for supplier compliance and contract leverage?

Legal & Compliance

- ☐ Is the platform SOC 1 / SOC 2 / ISO 27001 certified?
- ☐ Does it address eInvoice mandates? How?
- ☐ Does it maintain clear audit trails and retention by region?
- ☐ Can sensitive invoices (legal settlements, exec vendors) be segregated?
- ☐ Who controls deletion when regulations allow?

CFO & Executives

- ☐ How much working capital could faster processing unlock?
- ☐ Does it provide fraud detection on every invoice?
- ☐ What kind of reporting and dashboards can I expect?
- ☐ How fast is time-to-value - months, or years?
- ☐ Can it scale globally without adding headcount?

PRO TIP

Don't just ask for feature checkboxes. Run a short workshop using your invoices and exceptions. You'll quickly see which vendor delivers impact vs. just slides.

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