MEKORMA

YOUR PATH TO AP AUTOMATION

The ultimate checklist for choosing the right solution

Align with internal processes:
Ensure the AP automation solution aligns with your existing internal processes and workflows to minimize disruption and facilitate a smooth transition.

Ensure stakeholder buy-in:
Engage stakeholders early in the process to gain their input and buy-in. Consider their needs and preferences to ensure the chosen solution meets their requirements.

Balance long- and short-term objectives:
Balance short-term gains with long-term objectives by choosing a solution that offers scalability and flexibility to adapt to future business needs.

Conduct cost-benefit analysis:
Conduct a thorough analysis to assess the financial impact of implementing the solution. In some cases, rebate programs may result in significant savings that exceed the implementation costs.

Validate integration with your ERP:
Ensure the AP automation solution integrates with your ERP system, such as Dynamics 365 Business Central, to avoid compatibility issues and maximize efficiency.

Consider your business model:
Do you manage a shared-service AP model? Is AP a centralized or decentralized process across different units and locations? Consider multi-entity functionality in your assessment process.

Assess available payment types:
Many AP automation providers are limited in the type of payments they can process. Check if the solution you are considering can handle the payment types you need.

Check for mobile accessibility:
Consider solutions that offer mobile access, allowing your team to manage AP processes on the go.

Ensure workflow flexibility:
Choose a solution that can grow with your business and accommodate changes while providing flexible automation workflows for today and tomorrow.

Limit fraud risk and prioritize protection:
Prioritize solutions with robust data security measures, such as encryption and secure storage, to protect sensitive financial information

Implement change management best practices:
Develop a comprehensive change management plan to help employees transition to the new AP automation solution smoothly. Provide training and support to mitigate resistance to change.

Assess provider's support and reputation:
Choose a vendor with a reputation for excellent customer support to ensure timely assistance and resolution of any issues that may arise.

Modernize your AP process today
Learn more at

mekorma.com