

ACCOUNTS RECEIVABLE INVOICE DELIVERY

BUYER'S GUIDE

15 QUESTIONS TO HELP FIND YOUR IDEAL
AUTOMATION SOLUTION



PURPOSE OF THIS BUYER'S GUIDE

Looking to automate your accounts receivable (AR) invoice delivery process? There are a lot of different vendors with a lot of different solutions ... so what questions should you be asking to find the right automation tool for your process?

Esker has developed 15 essential questions to ask any potential solution provider — and the answers you should expect — to make your decision-making process easier and help maximise the success of your project.

This buyer's guide arms you with the knowledge you need to select the most cost-effective and well-suited solution for your organisation's requirements.

WHY AUTOMATION IS NECESSARY

As companies struggle to control working capital, one solution that can provide quick relief is invoice delivery automation. Manual production and distribution methods for processing paper invoices require a significant amount of time and investment. This can have a direct impact on overall profitability and hinder your company's processing efficiency. Symptoms of inefficient invoice management include:



High cost per invoice



Lengthy cash collection delays



High invoice processing error rates



Ineffective reporting and status updates



Customer dissatisfaction



Difficult to retrieve sent invoices

Customer invoice automation — for both paper and e-invoices — delivers time and costs savings, lowers Days Sales Outstanding (DSO), decreases litigation risks, optimises invoice tracking, helps prevent lost invoices, and frees up staff time. In recent years, comprehensive and cloud-based invoice delivery automation solutions have emerged as a tantalising alternative to manual processing methods. In fact, electronic and automated invoice processes can result in savings of 60-80 percent compared to traditional paper-based processing¹.

BASED ON ESKER'S EXPERIENCE, COMPANIES LEVERAGING AUTOMATION CAN:

- Cut the cost of sending invoices up to 80%
- Lessen document handling time up to 96%
- Deliver 82% of invoices electronically
- Reduce errors and returns up to 90%
- Enhance collaboration and communication with a portal
- Reduce DSO as much as 7 days
- Achieve 100% visibility on invoice delivery rates
- Improve invoice dispute resolution
- Increased AR team's productivity and free up time for higher-value tasks

1. Koch, Bruno. "E-Invoicing / E-Billing: Digitisation & Automation." Billentis. PDF file.



**15 QUESTIONS TO
HELP FIND YOUR IDEAL
SOLUTION**

AUTOMATED INVOICE DELIVERY

“We are looking for a comprehensive automation solution that can address all our invoice management needs: e-invoices, paper invoices and a combination of the two. For customers not ready to switch to e-invoicing, how do you manage both formats?”

Your solution provider should send all of your invoices electronically while still allowing your customers to receive those invoices in whatever format they prefer (e.g., postal mail, email or other electronic channel, or a combination). Rather than taking aggressive action on e-invoicing (i.e., forcing customers to opt-in), you need a step-by-step approach that creates a smooth transition between legacy systems and future e-invoicing operations.



WHY ESKER?

Esker offers an invoice delivery automation solution that grows with your business and easily adapts to your customers' needs. As customers become ready to adopt e-invoicing, you can easily satisfy changing preferences and tailor invoice delivery to each customer. Esker processes and makes e-invoices available to your customers in any file format (e.g., PDF, XML, etc.), via any electronic media (e.g., email, publishing on a web portal or EDI), and integrated with existing Accounts Payable applications (as Esker has interoperability capabilities with other vendors).

Esker Mail Services, part of Esker's Accounts Receivable solution, is a business document delivery service that makes traditional business mail completely electronic for the sender from start to finish. Paper invoices are electronically submitted directly from any application to one of Esker's worldwide mail production facilities, where they are printed, folded, stuffed into envelopes and handed-off to the local postal services within 24 hours of creation.

SUCCESSFUL INVOICE DELIVERY

“Can your solution help us eliminate paper invoice delivery errors and ensure e-invoices are successfully delivered?”

Removing human intervention and subsequent errors are at the core of an automation solution. For paper invoices, your solution provider must ensure that: A) The right invoice is in the right envelope; B) It is sent to the right customer; and C) The correct number of invoices are accurately sent.

Sending e-invoices as attachments can be problematic as email attachments are often identified as spam and there is no way of knowing if your customer has opened the attachment and read the e-invoice. Your solution provider should produce easily downloadable e-invoices. Spam filters are avoided and invoice status visibility is maintained thanks to the web portal.



WHY ESKER?

Esker tracks every invoice processed with a unique identifier (included in a bar code on each page). These bar codes provide traceability and make sure that the right document and the correct number of pages are processed and delivered to the appropriate parties.

For e-invoice delivery, Esker offers two options: an email with an attachment or an email with a link to a web portal. Both you and your customers can easily view and retrieve invoices on the web portal. When an e-invoice is published on the portal, an acknowledgement is created when read. Reminders can be sent when the invoice has not been read, and, in case of a dispute, the acknowledgement allows you to verify the date and time of each sent invoice.

INVOICE TRACEABILITY

“How do we know if our invoices have been delivered on time to the postal service (via paper) or directly to our customers (via e-invoice)?”

Your solution provider should supply invoice tracking and reporting capabilities — giving you access to the status of your customer invoices at all stages of the process. You should enjoy peace of mind knowing that your documents were handed off to the postal service in a timely manner or received by your customers via email.



WHY ESKER?

Esker's solution features a convenient web portal for monitoring the progress of all your mail, fax and email jobs. With online 24/7 real-time tracking and reporting, every sent document is tracked and the data is stored in an online archive for up to 11 years.

Traceability and process integrity are achieved via bar codes added to each page for paper invoices and read-receipts for e-invoices. When published on the web portal, each invoice creates an acknowledgement when it is read and reminders can be sent when the invoice has not been read.

In the event of a dispute with a customer or tax authorities, even years after the invoice was processed and delivered, you are able to quickly locate it and provide the original invoice as evidence.

CUSTOMER E-INVOICING ADOPTION

“How can we get our customers to agree to switch from paper invoices to e-invoices?”

It is in your and your customer's best interest to switch from paper to e-invoicing, as it can significantly reduce processing costs and DSO. The switch to e-invoicing should be seamless, done at the customer's pace and with their approval, without affecting your business.



WHY ESKER?

Esker provides you with the right tools (web portal, project guidance, e-invoicing deployment kits and legal advice) to help you assist your customers in their move to e-invoicing.

By encouraging your customers to connect to your web portal, you are facilitating the task of gathering email addresses, as well as obtaining their agreement for e-invoicing. The web portal makes it easy for you to know what each of your customers prefer when it comes to receiving their invoice.

E-INVOICING COMPLIANCE

“Does your AR solution support different e-invoicing regulations with both private and public entities? How do we maintain compliance with local e-invoicing laws?”

With many governments and large corporations adopting e-invoicing for B2G, B2B and B2C operations — some even mandating it — businesses must send e-invoices if they want to get paid. Every country has its own specifications in terms of formats, required fields and platforms. Keeping up with changing regulations is tricky, and managing customers and suppliers across borders adds even more complexity. You need a provider who can ensure e-invoicing compliance not only locally but also internationally with an in-depth knowledge of the ever-changing global regulatory environment.



WHY ESKER?

Esker helps companies deliver e-invoices in compliance with the local regulations of more than 60 countries. This includes generating proper formats from invoice data (e.g., PDF, UBL, Facturae, Fattura-PA, etc.), communicating with PA platforms (including PEPPOL) to send e-invoices and track their status updates, and providing the legal archiving of the e-invoice.

Esker helps you achieve global compliance in whatever technology you choose: e-signatures, BCAT, EDI, archiving. With proficient knowledge of the local markets and issues at hand, Esker adapts its solution to evolving legislative requirements.

EFFICIENT & AFFORDABLE PAPER INVOICE DELIVERY

“What are the cost savings and time gains achieved when sending paper invoices with your solution?”

Your provider's solution should include mail production centres capable of producing and delivering your paper invoices to the postal service within 24 hours of being generated. This quick turnaround time results in faster invoice payment and reduced DSO.



WHY ESKER?

Esker's strategically-placed network of worldwide production facilities and its expertise in mail production enable customers to save time and money. As mail is processed in real time, invoices are sent out within 24 hours of being created and are therefore paid faster, thus lowering DSO.

You also benefit from dramatically reduced operational costs (hardware and maintenance) and least-cost routing. Furthermore, with the absence of human errors, you do not incur reprinting and reposting costs associated with incorrect invoices.

IMPROVED & EFFICIENT CUSTOMER COMMUNICATIONS

“How can we improve the way we communicate and collaborate with our customers, as well as minimise our team’s workload?”

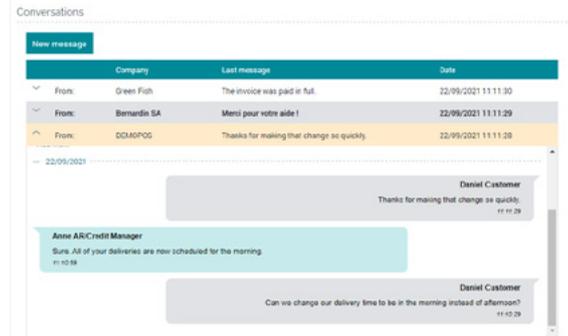
Your provider’s solution should include an online customer portal, which allows for smarter AR interactions, strengthens customer relations and increases your AR team’s productivity.



WHY ESKER?

Esker’s secure portal provides an open line of communication, enabling you and your customers to improve information sharing, facilitates the move to e-invoicing, and improves dispute resolution. Customers can exchange information, get visibility on disputed invoices and chat directly with your sales administration staff to ask any invoice-related questions or clear up any discrepancies (e.g., correct an invoice if needed or apply a credit note). This allows your AR department to reduce unnecessary paper handling, emails and phone calls and focus on more value-added tasks.

The portal can be branded with your company logo and colours so your customers will immediately identify your corporate identity, resulting in increased portal adoption rates.



DASHBOARDS & ANALYTICS

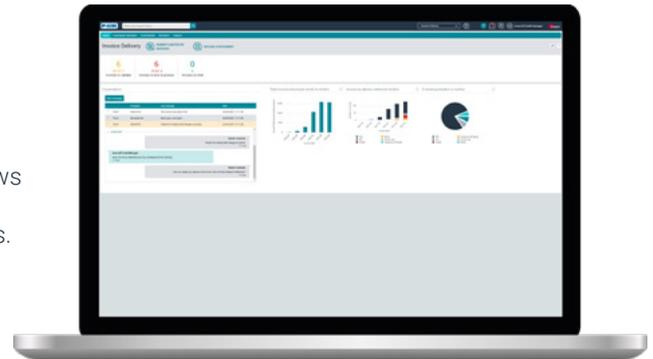
“It’s important that we keep an eye on the pulse of our business. Are you able to provide control and visibility into overall AR performance?”

Your provider’s solution should offer packaged key performance indicators (KPIs) and dashboards that provide real-time visibility and other analytical tools. This type of enhanced control and monitoring makes it easier for everyone involved to perform daily tasks, monitor performances, analyse areas of improvement, and allocate resources and workloads.



WHY ESKER?

Esker’s Invoice Delivery solution is equipped with intelligent customisable dashboards that display useful and up-to-date information, visual analytics, views and reports (e.g., how many invoices are to validate or in error, how many have been paid, customer e-invoicing adoption rates, etc.), and allows users to retrieve all information on your customer invoices, orders or any other supporting documents.



ELECTRONIC ARCHIVING

“We want to e-archive our customer invoices to avoid storing mounds of paper. Will we be able to access our documents easily?”

Your solution provider should be able to automatically archive your invoices electronically, allowing you to eliminate the time-consuming responsibilities of manual filing and paper storage. Additionally, invoices should be archived in compliance with all e-invoicing regulations and securely backed up by your solution provider's infrastructure and always accessible to authorised personnel from any location for as long as you choose.



WHY ESKER?

Fully compliant with the EU Directive and regulatory frameworks, Esker's electronic archiving solution provides confidentiality, control and accessibility to all invoices via a secured infrastructure and web portal. With Esker's powerful multi-criteria search engine, you only need to enter one or more search criteria in the web interface and your invoice will quickly be identified. Invoices are always accessible to any authorised personnel from any location for as long as you need them, and access to your document is secured using advanced login security policies. A backup of your archive is always available and a digital media copy can be requested.

ERP INTEGRATION

“Will your solution integrate with our ERP system?”

Implementing an automation solution should not require additional costs for custom development. If your AR solution does not work with your current ERP system, the payoff will take longer, coupled with a higher Total Cost of Ownership (TCO). Ideally, you want a solution that is compatible with a wide range of ERP systems, is configured to address the unique needs of any business, and easily integrates with your current infrastructure.



WHY ESKER?

With 70+ ERP solution integrations to date, Esker’s integrated cloud platform provides multiple services and business packages to automate complex business processes and orchestrate actions across departments. Whether you use SAP, Oracle, Microsoft, another ERP or a combination of ERPs, Esker seamlessly integrates with your ERP applications without any additional hardware or software requirements or disruptions to your current ERP landscape. Esker provides simultaneous integration with multiple ERPs, simplifying diverse environments resulting from M&A activity.

BUSINESS CONTINUITY

“We can’t risk delays in business processes or the chance of losing critical information. Do you commit to delivering business continuity, particularly in challenging times?”

Documents must be transmitted in a timely fashion with a redundant, always-on and backed up infrastructure so that information is handled in a secure, confidential and traceable manner. Your solution provider should also make crucial business functions available to customers and suppliers at all times, even when working remotely. This is particularly true today as more companies make the necessary transition to a remote workforce.



WHY ESKER?

Esker represents an essential critical infrastructure that enables businesses to remain operational during times of unprecedented change. Esker’s cloud-based platform with 24/7 availability is not location dependent and enables support to all customers, suppliers and partners from remote environments.

Esker’s Business Continuity and Security teams have well-established support plans in place to give customers peace of mind. Two independent operational centres in different locations continually monitor the operational continuity of Esker’s platform. Esker brings together both physical and virtual infrastructure to offer the highest levels of security, flexibility and performance to help organisations protect their confidential information at all costs.

INFORMATION SECURITY & INTEGRITY

“How can we be confident that our business documents will be securely handled and stored?”

Hosting and processing other companies' business and financial documents brings up the question of internal controls and security issues. The Statement on Standards for Attestation Engagements (SSAE) No. 18 and the International Standard on Assurance Engagements (ISAE) 3402 are reporting standards that analyse a service organisation's control (System and Organisation Controls (SOC) compliance) over information technology and related processes. A successful audit completion indicates that processes, procedures and controls have been formally reviewed.



WHY ESKER?

Esker completed its SOC 1® Type 1 examination in 2012, and SOC 1® Type 2 examination in 2014, by A-lign, an independent, third-party auditor, in order to enhance the level of security and assurance it provides to all its on-demand customers. SSAE 18 and ISAE 3402 standards validate the quality and integrity of Esker's internal control processes and procedures for on-demand customers and address the rules of internal control outlined in the Sarbanes- Oxley Act legislation.

Esker has achieved ISO 27001 certification for its Information Security Management System (ISMS) of on demand services. Customers using Esker's cloud solutions can be confident their data is safe, properly controlled, and that security best practices are in place. Consistent with its pledge to protect.

Consistent with its pledge to protect personal privacy, Esker has been certified by TRUSTe, an independent third party online privacy solutions provider.



ONE PLATFORM FOR ALL CUSTOMER INTERACTIONS

“Today we’re in the market for an invoice delivery solution, but tomorrow we may need to automate other customer processes — can you support our growing business needs?”

Your solution provider should provide all the technology, solutions, service and support needed to respond to your expanding needs. That means having the capability to manage all customer interactions and address the full order-to-cash cycle (O2C) through a single, centralised solution.



WHY ESKER?

Invoice delivery is just one part of the AR and O2C process. From credit to order management to collections, payment and cash allocation, Esker provides users with an integrated, end-to-end platform to drive added value and efficiency in every phase of the O2C cycle.



GLOBAL PRESENCE

“Can you support our multiple offices, multi-language and regulatory compliance needs?
As a global company, we need to be sure your solution can be scaled out.”

In today's global market place, companies need an international solution provider who can support their automation needs across a network of offices across the globe, offer multi-lingual capabilities and have proven, cross-border deployment success.



WHY ESKER?

With offices around the world, Esker operates globally and has a track record of many successful worldwide implementations. Esker's on-demand platform allows for a rapid solution rollout to various countries without the need to plan for multiple instances or larger, more complex infrastructure. Esker's web interface and technical support are available in multiple languages. Esker provides e-invoicing and regulatory compliance in over 60 countries and has a network of international mail production facilities.



EXPERT CONSULTANCY & PROJECT METHODOLOGY

“Will our solution be implemented on time and within budget?”

To get the greatest amount of business value in the shortest amount of time, you should be afforded a high level of involvement early in the planning and throughout the project. A skilled solution provider with years of solution implementation experience understands the importance of respecting timelines and budgets.



WHY ESKER?

Esker's use of Agile methodology minimises project delays and gets customers to their desired destination -- golive -- as quickly as possible. Stakeholders are actively involved throughout the process and achieve maximum value in every phase of solution delivery.

As opposed to the traditional "waterfall" approach, Agile methodology enables decisions to be made with context, invests resources in the most value-added features, and allows solution features to be tested and used in a short amount of time.

ESKER'S INVOICE DELIVERY SOLUTION

Esker's Invoice Delivery solution automates the delivery and archiving of customer invoices via any media (e.g., paper, e-invoices, EDI, etc.) — all without forcing your customers to change or sacrifice compliance and all while providing real-time visibility into invoice delivery status.

WHY AUTOMATE WITH ESKER?

- **AUTOMATE 100% OF DELIVERY OF PAPER & E-INVOICES**
- **INCREASE PROCESS EFFICIENCY BY REDUCING DSO**
- **REDUCE INVOICE DELIVERY ERRORS**
- **ALLOW CUSTOMERS TO GO PAPERLESS AT THEIR OWN PACE**
- **ENSURE E-INVOICE COMPLIANCE IN 60+ COUNTRIES**

HOW IT WORKS

1 - VALIDATE & TRANSMIT

Once a customer invoice is validated in the ERP or billing application, it is automatically and securely transmitted to Esker to be processed.

2 - EXTRACT & FORMAT

Invoice data is automatically extracted, while the invoice is converted into the customer's preferred delivery format (e.g., PDF, XML, etc.).

3 - DELIVER & ARCHIVE

Invoices are delivered according to customers' preferences by postal mail or in legally compliant electronic formats. Invoices are archived for up to 11 years, and are available online 24/7 to both you and your customer.

4 - COLLABORATE & TRACK

The portal provides suppliers and customers with a collaborative workspace and chat function. Tailored dashboards and metrics deliver KPIs to facilitate daily tasks and makes it possible to easily resend invoices to customers.

REAL RESULTS ACHIEVED BY OUR CUSTOMERS



Our goal was to eliminate the maximum amount of paper in our company, including all paper archives, and put in place a fast and reliable solution for our customers. Esker has given us that.

CEO | GECITech



The solution works seamlessly with all other systems and offers flexibility for customers who have moved to 100% electronic invoicing, as well as those who prefer to maintain paper invoices.

CFO | STACI



Esker immediately knew how to address our needs and deliver a pertinent solution, allowing us to reduce our invoice processing time by one third and to significantly improve our DSO.

Director of Information Systems | Arkadin



Esker has exceeded our expectations and we have noticed significant improvements in the response from customers to provide payment more quickly.

Customer Operations Program Manager | Thomson Reuters

TOSHIBA

Toshiba reduced DSO to just 1 day

ONETA

Oneta reduced time spent retrieving invoices by 95%

xylem
Let's Solve Water

Xylem increased customer e-invoicing adoption rates by two-thirds

HAEMONETICS

Haemonetics saved 3 hours per day of printing, sorting and stuffing invoices

FUJIFILM

Fujifilm Business Innovation Corporation processed invoices 3x faster

ABOUT ESKER

Esker is a global cloud platform built to unlock strategic value for finance and customer service professionals, and strengthen collaboration between companies by automating the cash conversion cycle. Founded in 1985, Esker operates in North America, Latin America, Europe and Asia Pacific with global headquarters in Lyon, France, and U.S. headquarters in Madison, Wisconsin. Our customers use our cloud solutions to increase the efficiency, productivity and visibility of their Procure-to-Pay (P2P) and Order-to-Cash (O2C) processes.





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