



Keys to a Successful AP Automation Implementation

Have a strategy, prioritize payments, and build on early wins



Why AP automation succeeds (or fails)

The **benefits of AP automation** can be substantial: reduced manual work, greater accuracy, faster cycle time, reduced payment costs, optimized vendor rebates, and greater control over cash flow, to name a few.

But not every business sees the same success.

On paper, **AP automation** sounds simple: digitize invoices, add approvals, and send payments faster. In reality, AP sits right in the middle of some of the hardest problems that finance teams deal with: cash flow, risk, controls, vendor relationships, and scale. That's why two organizations can implement similar technology and end up with completely different results.

This is common with any software, not just AP automation. Some teams get real impact quickly: fewer checks, faster closes, better visibility, tighter controls. Other teams end up facing the same challenges: still managing exceptions, chasing approvals, fighting integrations, and wondering where the ROI went.

The difference typically isn't the software, but how the project is approached. Teams that get the most value from AP automation typically do a few things differently:

- ✓ They rethink existing processes so modern AP solutions can deliver their full value
- ✓ They build payments into the strategy early, instead of adding them later
- ✓ They prioritize integration so data flows cleanly with with the ERP
- ✓ They assign an internal owner to drive adoption
- ✓ They define success upfront with measurable goals

When teams approach implementation this way, automation doesn't just digitize the old process, it creates a better one. This eBook covers what that looks like in practice for finance teams looking for real results.



Start with the right foundation

Before jumping into the steps, let's cover a few realities:



AP isn't just back office processing anymore. It directly impacts cash flow, risk, audits, vendor relationships, and capital strategy.



Processes matter more than features. Automation doesn't fix broken workflows, it locks them in. For example, if invoice approvals are automated, but payments are still made using paper checks, you haven't solved the problem.



Integration isn't a detail. If your AP system and ERP aren't in sync, everything else gets harder (reporting, reconciliation, controls, and scale).



An internal champion has to own the process. Not just the go-live, but for ongoing adoption, optimization, and evaluating and communicating results. Successful AP automation implementations have clear leadership and accountability.

With these foundations in mind, let's look at the steps that consistently separate successful AP implementation projects from ones that stall out.



9 steps to a successful AP automation implementation

1. Secure an internal champion

Every successful implementation has a real owner. Not a group of people or a shared inbox... a real person.

This person connects what the CFO cares about (risk, cash flow, controls, and ROI) with what the finance team is looking for from AP automation (speed, usability, fewer exceptions, and less rework). They push through change and make sure the system actually gets used the way it's supposed to. That usually entails making calls on process changes, setting priorities, and holding people accountable when old habits creep back in.

When there's no champion, decisions can take longer, priorities compete, adoption may suffer, and the system may not deliver its full value. In our experience, those organizations that assign a project champion to own the end-to-end process get better and faster results.



2. Have a clear payments strategy

Many teams start with invoices and think they'll figure out payments later. When they do that, payments get layered on at the end which can create a lot of manual work full of exceptions. Without a real strategy, teams end up with invoice workflows that look modern, but payment operations with a lot of workarounds.



When invoice approvals are automated but payments stay manual, the cracks start to show:

- ⚠️ **Delayed payments due to manual check runs**
- ⚠️ **Duplicate payments or missed payments**
- ⚠️ **Breakdowns in approval-to-pay handoff**
- ⚠️ **Inconsistent payment timing that misses rebates and discounts**
- ⚠️ **Frustrated vendors and increased inquiry volume**

How a payables first foundation can unlock better invoice automation

When you modernize payments first, invoice automation gets a lot easier.

With a payables first foundation, teams benefit from:

- ✔️ **Organizational momentum and proven value**
Early ROI from payment automation builds internal support for additional automation phases.
- ✔️ **A stable framework for end-to-end automation**
Predictable, controlled payments mean invoices flow through faster with fewer exceptions.
- ✔️ **Future-proof scaling across the entire invoice-to-pay cycle**
When teams layer on invoice capture, intelligent coding, and approval routing, it plugs into an already optimized payables engine.

Embedded vs. integrated payments

Some ERP systems like [Sage Intacct](#) have embedded modern payment automation capabilities built directly into their finance workflow. Instead of juggling multiple systems, finance teams can manage all payments in one place. Approvals, scheduling, and reconciliations get simpler, and so do your processes.

Why teams choose integrated payments

- One place to run payments
- Fewer manual steps and errors
- More consistent workflow
- Better controls and efficiency

Why teams choose embedded payments

- End-to-end workflows directly within your ERP
- Less context switching
- Better visibility and audit trails
- Tighter, cleaner processes

Check out [this guide](#) to help decide the right approach for your organization.

Learn more about the benefits of leading with payments first in the eBook: **AP Automation: Starting with Payments Instead of Invoices**

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3. Ensure easy integration with financial systems

If invoices live in one system and payments live in another, your team will spend more time **reconciling** than optimizing.

An AP automation platform and ERP system that aren't in sync will cause problems everywhere:

- ⚠ **Reporting won't line up**
- ⚠ **Reconciliation stays manual**
- ⚠ **Controls get weaker or harder to enforce**
- ⚠ **Teams spend more time fixing data than using it**

With a good integration, you should expect two-way sync you can rely on, vendor data that doesn't require constant correction, reporting that matches across systems, and controls that don't require manual intervention.

Without it, automation just duplicates work. Finance sees one number, accounting sees another number. Then someone builds a spreadsheet to bridge the gap. That's not scale!

Customer case study: Brightview Health accelerates growth with MineralTree

The problem

Brightview's manual and time-consuming AP process made it impossible to keep up with rapid growth.

Why MineralTree

- Easy NetSuite integration: Two-way sync kept invoices and payments aligned without IT headaches
- Automated PO matching: Flags mismatched invoices so accountants only intervene when needed
- Fast implementation: Up and running in weeks with no major IT support needed

The results

- AP processing went from hours to minutes per invoice
- 150 invoices processed per day by AP staff
- Streamlined audits in 20-30 minutes
- Cash flow optimized with virtual cards
- Supported growth from 4 to 30 centers and 3,000 to 10,000+ invoices annually

4. Don't automate bad processes

This is where a lot of projects quietly go wrong.

Nobody intentionally sets out to sabotage ROI, but many teams accidentally do it by trying to recreate their legacy AP processes inside of a new system. This simply accelerates friction that you were trying to eliminate.

Three examples of legacy processes you may want to allow your modern AP automation software to refresh:



1. Invoice approvals

An invoice hits the department head, finance, and a manager for approval. Usually they're all approving the same thing. This setup was often implemented years ago when visibility was low and controls were weak. Modern AP automation has better controls built in so you can simplify approvals: only the right people see the invoice, thresholds automatically route based on amount, exceptions are flagged by the system, and all actions are tracked for full visibility and compliance.



2. Invoice / purchase order (PO) matching

PO matching and rules are implemented, but your team still checks every invoice against a PO manually just to be safe. You're paying for automation, but also keeping the same workload.



3. Shadow processes

Tracking payment status in a spreadsheet, reconciling in a separate file, and managing vendor updates over email because that's how your team has always done it isn't replacing the old system, it's running two processes in parallel.

Modern AP tools are built around best practices for a reason: fewer touchpoints, clearer controls, better visibility, and more straight-through processing. They assume you're willing to simplify. The original reason might not even exist anymore, but the bad legacy process does.

5. Optimize the payment mix

Optimizing the payment mix means actively choosing the right payment method for each vendor rather than paying each vendor the same way. The decisions are based on cost, risk, vendor preference, and working capital goals.

Key ways to optimize the payment mix include:

Diversify payment methods

Shift appropriate spend from checks to ACH, and secure, same day virtual cards strategically to reduce delays, lower risk, and capture rebates.

Smart routing

Let your system prioritize the most efficient, secure, and cost effective payment method for each invoice.

Let your system prioritize the most efficient, secure, and cost effective payment method for each invoice.

This improves cash flow, strengthens vendor relationships, reduces errors, and creates revenue opportunities.



The benefits of virtual cards

Virtual cards work like a credit card, but with far more control. They're delivered digitally to vendors and can be processed just like a standard card payment.

- **Simplicity:** Centralizes payments in one workflow with streamlined reconciliation
- **Security:** One-time, fixed amount numbers reduce fraud
- **Working capital:** Pay vendors while earning valuable cash-back rebates
- **Improved vendor experience:** Faster delivery than checks and no need for bank details
- **Accuracy:** Exact amounts prevent overpayments and errors



Turn AP into a revenue center

AP isn't just about cutting costs. It can generate revenue. Paying vendors with virtual cards can earn cash-back rebates on spend that's already happening.

Here's why it works:

- You get rebates on payments you're already making
- No changes to how people buy or approve things
- Better security and control over payments
- Managed vendor enrollment helps more vendors accept virtual cards

For some teams it's a nice bonus and for others it offsets AP costs or even becomes a mini revenue stream.

With the right payment mix and support, AP stops being just a cost center and can start paying for itself.

6. Leverage payment services from your solution provider to drive adoption and benefits

Software alone doesn't solve adoption challenges or optimize your payment mix. That's where an evaluation of your current payment methods can make a big difference. That view can help:

- **Match vendors to the best payment methods**
- **Identify points of payment friction**
- **Surface opportunities for efficiencies, control and data-driven monetization**

This is one of the fastest ways to turn a good implementation into a great one because it removes work from your team instead of adding to it.



MineralTree payment optimization services

Most finance teams know their payment process is too manual, too fragmented, and too exposed, but they lack the visibility to pinpoint where effort, cost, and risk are coming from. MineralTree's payment optimization changes that by giving teams a clear, evidence-based view of how payments run across checks, ACH, and digital methods. This analysis surfaces where workflows break down, where manual steps or outdated methods create friction, and where payment-mix inefficiency is costing time, money and risk exposure.

A report is generated that pinpoints where modernization will improve efficiency, strengthen control, accelerate payment timing, and create measurable financial value. When virtual card is a validated fit, customers benefit from secure same-day delivery and rebate potential without disrupting supplier relationships or internal workflows.

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7. Identify early wins and build momentum

Trying to automate everything in one day is like trying to unscramble an egg.

Successful teams pick a starting point, get a win, and build from there. That win might be reducing checks, speeding up payment cycles, improving fraud controls, or cutting processing time. Choose areas that you'll see the quickest impact and use that momentum to drive adoption across the team.

Early wins do two important things: prove ROI and build confidence and buy-in across the organization. The key is to be thoughtful about where to start, measure progress, and recognize that momentum matters more than perfection.



8. Use AP analytics to inform the business

AP isn't only about processing transactions, it's operational insight. Once your data is clean, it can tell you:

- **Where cash is actually going**
- **Which vendors have the most exceptions**
- **Where discounts and rebates are being missed**
- **Where risk exists in your process**
- **How predictable payment timing is**

AP analytics can influence business decisions as long as it's accessible and trusted.

9. Measure performance before and after implementation

If you don't measure performance, you can't prove it. Before you start, baseline the metrics that matter, such as:

- **Time and people required to complete monthly AP runs**
- **Errors and exceptions that require manual handling**
- **Cost of paying with checks**
- **Level of fraud**
- **Vendor discounts and late payment penalties**
- **Cash flow optimization and liquidity**

Then measure consistently after implementation. The data will show the before and after of gains in efficiency, cost, and risk reduction so that you can prove ROI.



Final thoughts

Teams that reap the benefits from AP automation don't just install software, they think about how it's implemented.

Successful implementation starts with a strong foundation: a clear payments strategy, an internal champion to drive adoption, and workflows designed to reduce friction instead of replicating legacy processes. Integration has to be reliable, early wins need to be identified, and performance needs to be measured from day one.

When done correctly, AP implementation can transform operations. Processes run smoother, exceptions drop, and your team gains control and visibility. Get it right and AP stops being a bottleneck and becomes a driver of efficiency, control, and measurable business impact.

Helpful resources



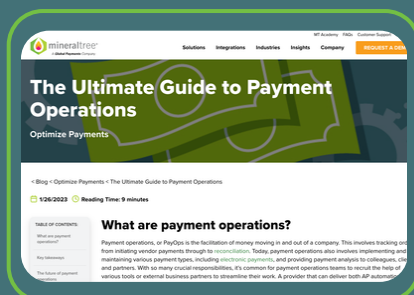
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About MineralTree, a Global Payments Company

About MineralTree, a Global Payments Company MineralTree, a Global Payments (NYSE: GPN) company, provides modern, secure, easy-to-use accounts payable (AP) and payment automation solutions. By uniting technology and passionate people, we make the process of business payments easy, impactful, and profitable. Our solutions combine ease of use with robust capabilities that drive meaningful insights, transforming the back office into a strategic partner of the corner office.

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