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Invoice Approval Automation & the Undeniable Truth

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Empowering businesses to achieve the extraordinary.

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Invoice approval automation and the undeniable truth

An Undeniable Truth occurs when your own experience confirms it. This is no longer about a clever marketing pitch, it is about recognising that a significant change has occurred and how the Undeniable Truth changes your approach to the business issue you are trying to resolve.

In this case, the Undeniable Truth is that you are already receiving an ever growing number of your purchase invoices as a PDF via email. For most organisations, you will already have over half of your invoices arriving this way and the volume is continuing to grow rapidly.

It is now totally acceptable to send out your sales invoices via email as a PDF. Almost all accounting / ERP solutions have this as core functionality and because almost all Statements are already sent this way, it is just a matter of turning it on. The invoice is delivered immediately without the minimum of £1 costs each and a 3 day delay before it arrives, plus it is "green".

As important, if you simply ask all your suppliers to send their invoices as a PDF via email, the vast majority will do so. It is easy to achieve between 80% and 90% of all invoices being received as a PDF via email. Emailing invoices as a PDF is now the market norm.

The implication of this Undeniable Truth is that EVERY purchase invoice automation project MUST BE FOUNDED on the effective automating of the capture and processing of an email with a PDF invoice attached – because that is how almost all of your supplier invoices are going to arrive.

And whatever your preferred solution is, it would be simply ludicrous for the planned next step to be printing the PDF to deliver a hard copy paper invoice!

Efficient processing of PDF invoices received by email

The UK's transition to emailed PDF invoices as the default methodology changes everything!

A PDF is an electronic data packet that includes the ability to render the data in a readable format.

The beauty of data is that it can be accurately captured, re-formatted and presented as an XML data packet for other applications to process. The PDF data delivers all of the information that is required to be able to fully automate the capture, processing and storing the PDF invoice for future reference.

PDF invoices have made OCR scanning solutions redundant – because OCR starts with paper, requires expensive equipment and consumes resources through significant user intervention.

The Compleat e-Invoicing solution – delivering the XML data packet and PDF attachments – is a SERVICE. Your only time contribution to enjoying this service is to ask all your suppliers to send their invoices as PDF's to a new email address that we provide and pay a small "transaction fee" for each invoice successfully processed.

This same service can also receive and process supplier e-invoices (delivered as structured data) and existing OCR solutions data output.

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Efficient processing of paper invoices

However, there will always be some paper invoices, albeit a rapidly reducing number – whether from the window cleaner, some utility bills or from very small suppliers that do not have any accounting software.

So we also need to provide a simple and cost effective way of dealing with this diminishing volume of paper invoices - preferably using a very similar user experience to emailed PDF invoices.
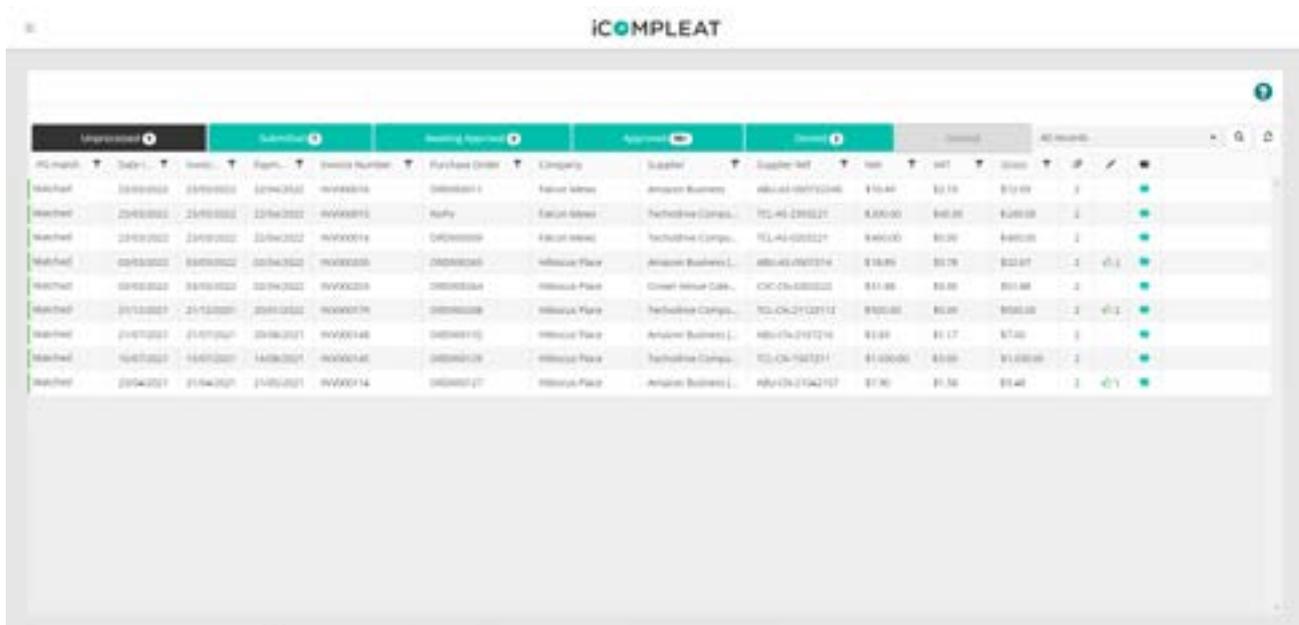
The most cost effective paper invoice process is to place a sticky bar code label on the first page of each paper invoice and then scan them using any existing scanning equipment. The scanning process saves each individual invoice using the bar code number as the unique identifier.

We now have a PDF image of the invoice that we can use to automate the posting and approval process and more important – we have removed all the paper invoices from the posting and approval process whilst retaining an electronic image to meet all HMRC regulations.

When combined with e-Invoicing, we have now removed ALL of the paper from the process.

Delivering paperless purchase invoice automation

Compleat Invoice automation application ensures that every transaction whether a scanned paper invoice or an emailed PDF invoice is automatically initially deposited in a "work tray" awaiting processing. This is effectively the purchase invoice register that includes the transaction source, with a time and date stamp of when it arrived.

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If you are using our purchasing order automation module, the emailed PDF invoices will automatically be reconcile against the order / receipt and a "three way match" is posted to your accounting software without being touched. A two way match (order and invoice) is automatically sent to the approver and on approval posted to the accounts. Those transactions that do not match are usually placed in the accounts payable work tray for review prior to being sent for approval or generate a credit note request.

Compleat presents the image of the invoice on the left hand side of the page and the posting functionality on the right hand side.

The accounts payable staff just select the relevant general ledger coding (pulled directly from your accounting software) and select the relevant approver workflow. Where all of a particular supplier invoices relate to a specific general ledger code, this is fully automated and the invoice is sent for approval without accounts payable intervention
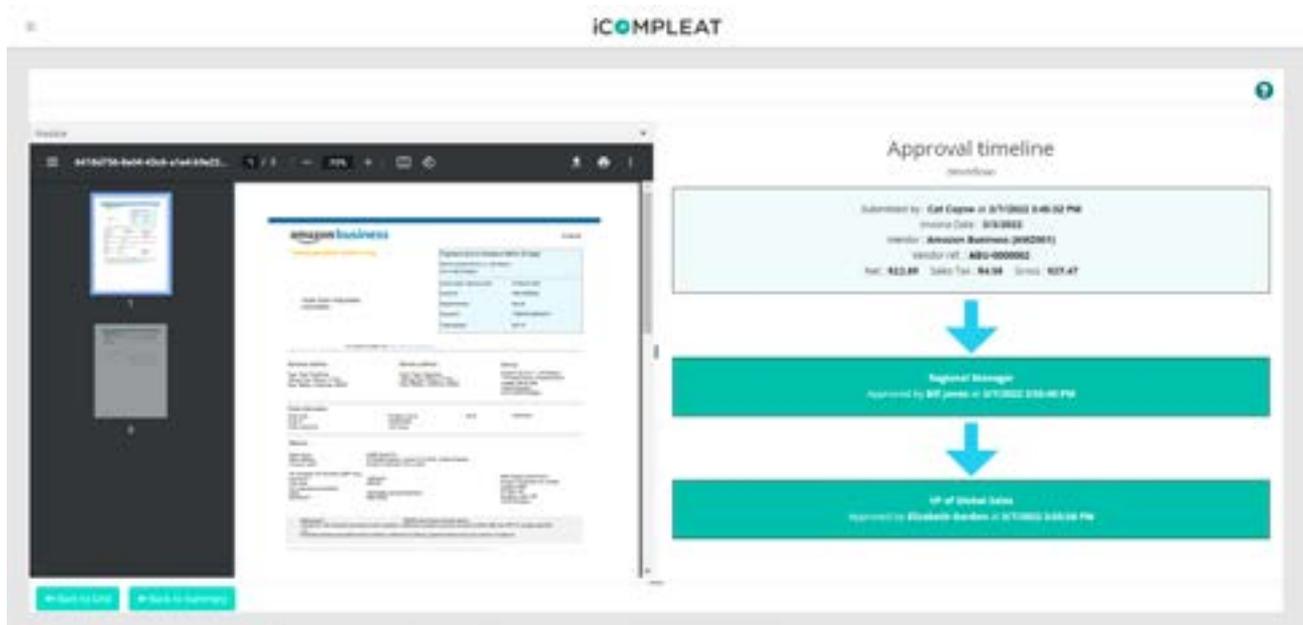

For implementations that are just for purchase invoice automation approval (there is no purchase order information to be matched) the accounts payable staff can select which individual transactions they process, or type of transaction, or perhaps by supplier, or just process the next one in line.

A scanned invoice (where we have no e-invoicing data) is posted in the normal way, selecting the supplier and entering the information from the invoice image and sent for approval.

This delivers a single methodology and process for dealing with every invoice with the electronic copy of the invoice attached to the transaction.

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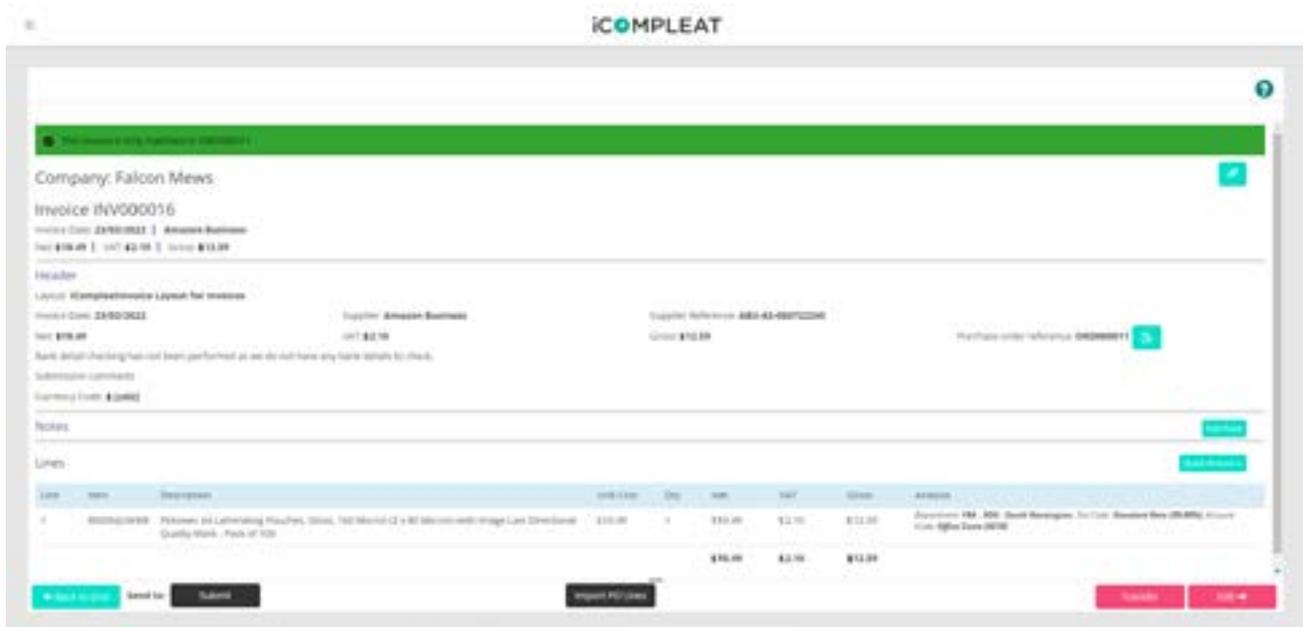
Approvals could not be easier. Simply review all of the information available and either approve, or deny, sending it back to accounts payable with the relevant notes.

Once finally approved, the transaction is posted to your accounting software.

Everyone (with the appropriate security profile) can see every transaction in play and exactly where it is in the posting and approval process.

Queries and credit note requests can be flagged with appropriate notes to fend of credit control calls and month end accruals are available as a report at any time and can exported into Excel for manipulation and import into your accounting software.

And most accounting software applications allow us to pass the location details of the purchase invoice image so it can be stored and accessed from within your accounting software.

The potential time savings and benefits of complete visibility and control are undeniable.

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