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**5 SIGNS IT'S TIME TO AUTOMATE  
FOR BLACKBAUD USERS**





**We're all busy.** No matter our career path or industry, we all have massive undertakings and side projects that prevent us from completing our normal daily tasks. And, that's just as true in life outside of the office. Think about the last time you got an oil change, or had the tires rotated on your vehicle. If you're like most people you probably have a propensity for putting off "big picture" things, because you're dealing with the minutia of day-to-day life.

For those in the accounts payable space, it's easy to say, "we've got a lot of irons in the fire right now, but AP automation is definitely something we'd like to do eventually — maybe next year!" It's tempting to hold off on implementing an AP automation solution until after that next big project. However, you are probably always going to have a big project on the horizon. You will always be busy no matter what time of year it is.



**“You will always be busy no matter what time of year it is.”**



While it's easy to put off AP automation until later, what some companies fail to realize is that there are events that happen within the life of a company that make it the perfect time to automate. In this eBook, we'll highlight five signs that it's time to automate your accounts payable process. If you're familiar with even one of these scenarios, then it's time to have a discussion with your boss about implementing an invoicing and payment automation solution. If you've witnessed multiple signs, then it should be a priority for your entire department.



# 01

## Volume Has Increased

### *Is Your Business Experiencing Rapid Growth?*

What would happen if your company grew to receive two or three times the volume of invoices you are currently handling? Thanks to the recovering economy, many accounts payable departments are seeing invoice volumes increase, which is both a blessing and a curse. More invoices mean more revenue, but it's also a challenge for AP teams that are still bogged down in manual, paper-based processes.

For example, The Wilton Companies, a real estate company, quadrupled in size from 2003 - 2008 without adding AP staff. Their invoice volume increased from 10,000 in 2003 to more than 14,500 in 2008, and the team was completely drowning in their inefficient, paper-based processes. After implementing a complete automation solution, the AP team was able to pay thousands of invoices with a couple clicks of the mouse.

Automation creates scalable processes that enable companies to effectively manage increased invoice volume and ePayables without hiring additional staff.



**2003 - 2008**

Without Adding AP Staff

**14,500**

Invoices in 2008



**10,000**

Invoices in 2003

## 02

# A Veteran AP Employee is Retiring

According to research by Robert Half, baby boomer retirements are accelerating, and more finance professionals are leaving the field than are entering it. Having grown up with technology, younger generations expect to do everything electronically. Therefore, it will be increasingly difficult to attract, and retain, AP professionals that are millennials with outdated, paper processes in place.

Do you have a seasoned veteran on your team who is retiring soon? If so, you may lose decades of valuable knowledge about your organization's accounts payable process. These experienced employees have their own shorthand for coding invoices. Before these invaluable veterans leave the company for good, it's important to capture their best practices.







Remember the Wilton Companies? In addition to solving for their growth problem, the company also had to plan for one of their longest employee's retirement. The only job she'd ever had was with Wilton, and over the years she had become a vault of accounts payable information. When an invoice came in, she automatically knew which property it should be associated with, and the company realized that it would be impossible for her to impart all of the knowledge that she had gained to a new employee.

When implementing an automation solution, you can attend hands-on configuration sessions to create an automated process that mimics your current process, translating a veteran employee's knowledge built into business rules and intelligent approval workflows. While you may lose a co-worker, you won't lose their expertise!

# 03

## Your Last Audit Didn't Go So Well



We all know that audits aren't fun. Often an auditor will spend 2 - 3 days with a company, searching through drawers spilling over with paper invoices. In an automated system, however, it may only take 2-3 hours for an auditor to complete their task. By providing an auditor read-only access to your online portal, they can quickly search at random for any invoices they'd like to review and see the audit trail immediately.

Automation provides greater visibility into the entire audit process. There's no such thing as a paper trail! You log into your portal to see the entire history of any invoice—from receipt through payment. It makes it easier on your auditor(s). But, more importantly, it makes it easier on you during the audit process. And with cloud-based AP automation solutions, employees can access all data and applications from anywhere, anytime using any device.



# 04

## Your Organization Has Been a Victim of Fraud

In a paper-based environment, your company's documents are constantly at risk. Physical copies of sensitive information can be easily misplaced, altered, or destroyed. If these documents are lost or tampered with, you no longer have access to the data necessary to effectively operate your business.

Research has shown that paper documents and checks are leading sources for fraud, because data is not protected. In fact, 48 percent of payment fraud can be tracked back to paper checks. According to a recent survey by the Association of Certified Fraud Examiners (ACFE), nearly 70 percent of corporate respondents have been victims of check fraud.

According to the New Hampshire Union Leader, 60-year-old John Plaza is facing two felony

(read more on the next page)





charges of theft by deception for the alleged embezzlement scheme at Riverside Self Storage in Nashua. Over the past six years, Plaza stole nearly \$106,000 from his employer, which is owned by F.W. Webb Co.

Plaza would rent out storage units for cash, and forego documenting the transaction in the bookkeeping. Plaza would then take the cash payments and manually advance the date in the computer system so that it looked like the customer didn't owe a balance. After manipulating the accounting software, Plaza would write off the amount owed and pocket the cash.

Plaza worked for F.W. Webb for 20 years and helped to oversee Riverside Self Storage since 2008. This deceptive and damaging turn of events could have been avoided, however, with AP and payment automation. Automation enforces strict adherence to business rules, reducing opportunities to commit fraud. Manual processes rely on post-payment review to detect deviations from business rules. By the time you've discovered an issue, the fraud has already occurred. An automation solution ensures that every invoice you process is legitimate before it's introduced into Blackbaud.

**“Automation enforces strict adherence to business rules, reducing opportunities for fraud.”**

# 05

## Your Internal Controls Aren't Up to Par

One reason organizations may become a victim of fraud, is because their internal controls aren't up to par! Internal controls are checks and balances put in place to prevent embezzlement and fraud. Segregation of duties is a common control used so that the same employee cannot perform certain combinations of functions.

With paper, you don't have the ability to put a series of checks and balances on it. Electronic payments are so much more secure than a paper check ever will be. With automation, you can add additional approvals to the process and create reports that check for duplicate invoices. Automation solutions track who enters an invoice, who approves it, and who batches it to Blackbaud – and it can't be the same person for each task, which stops collusion in its tracks.







## Pay Attention to the Signs!

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This guide was created by AvidXchange™, Inc. AvidXchange revolutionizes the way companies pay their bills. Serving more than 6,000 clients throughout North America and 300,000 vendors nationwide, AvidXchange is an industry leader in automating invoice and payment processes for companies spanning multiple industries. Interested in automating your payables and creating efficiencies for your AP team? Our automation specialists will create a customized demo and walk you through what a streamlined AP process looks like.

**To Schedule a Demo, Click [Here!](#)**

