

eBook



How to start a successful Purchase-to-Pay automation project

A step-by-step guide to boost efficiency
and reduce costs



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Introduction

Implementing Purchase-to-Pay (P2P) automation can transform your finance operations in many ways: saving time and costs, reducing risks, and unlocking real-time data for greater visibility into the performance of your department and the entire organisation, along with many more benefits. This guide will walk you through the key steps to ensure a smooth and successful automation project, from identifying pain points to selecting the right solution.



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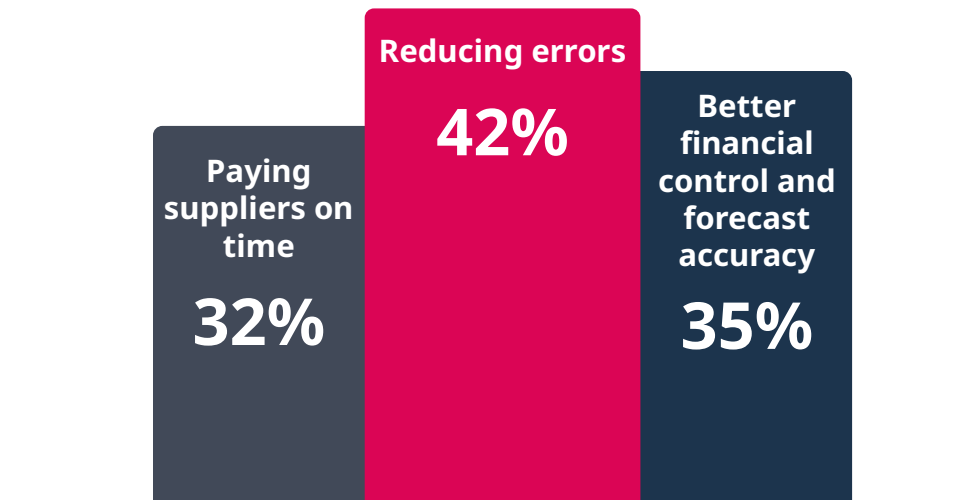
AP automation: Key UK statistics

Top 3 problems with manual Accounts Payable processes and systems:



Delayed invoice processing is the biggest cause of supplier relationship issues for UK finance leaders (40%).

Top 3 objectives to achieve with AP automation:



Almost half (43%) of UK finance leaders see improved data accuracy as the key advantage of Accounts Payable automation.

According to a survey by Ardent Partners, **69% of mid-market enterprises (MMEs) made Accounts Payable automation a top priority in 2023.** Yet, by 2024, **only 5% of mid-sized firms have fully automated their Accounts Payable function.**

Why are so many companies still holding back?


The hesitation often comes from persistent myths around AP and P2P automation, such as:

- **“It’s too complex and employees won’t adopt it”**
- **“Cybersecurity risks outweigh the benefits”**
- **“Automation is too expensive”**
- **“Our processes are too unique to be automated”**
- **“The ROI is difficult to measure”**

In the next section, we will outline the steps to successfully plan your project and choose a solution that dispels these myths, overcomes resistance and secures management buy-in.



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A smiling woman with glasses and a pink blazer is waving her hand. She is in a professional setting, possibly a meeting or conference, with other people blurred in the background.

Ready to transform
your P2P process?
Essential steps
for success



1. Map your processes and stakeholders

The first step to a successful P2P automation project is to understand where you stand today and where you want to go. This means carrying out a full assessment of your current processes and translating your findings into clear, measurable objectives.

Engage stakeholders

Interview all relevant stakeholders — CFO, accountants, buyers, approvers and executive management — to get a 360° view of your processes.

Ask questions such as:

- What are the key tasks performed daily?
- How do decision-making and approval workflows function?
- Which documents are processed, in what formats and volumes?
- Which systems are currently in use (ERP, accounting software, BI tools, supplier portals...)?



Tip: Host a short validation workshop where stakeholders align on pain points, priorities and desired outcomes.

Identify pain points and risks

From these discussions, build a list of the most pressing challenges. Common issues include:

- Time-consuming and error-prone manual tasks
- Processing delays due to unclear approval process
- Lost or duplicate invoices
- Poor supplier relationships caused by late payments
- Regulatory compliance gaps
- Lack of real-time data for reporting and control, etc.



2. Define clear objectives

Turn these pain points into actionable goals. Start with qualitative objectives, such as:

- Strengthening compliance and audit readiness
- Reducing fraud risk
- Improving supplier satisfaction
- Increasing visibility and control over spending

Then, define quantitative KPIs to track progress and ROI, such as:

- Average cost per invoice processed
- Average processing time from receipt to payment
- Number of invoices processed per FTE
- Frequency and cost of late payments or disputes, etc.

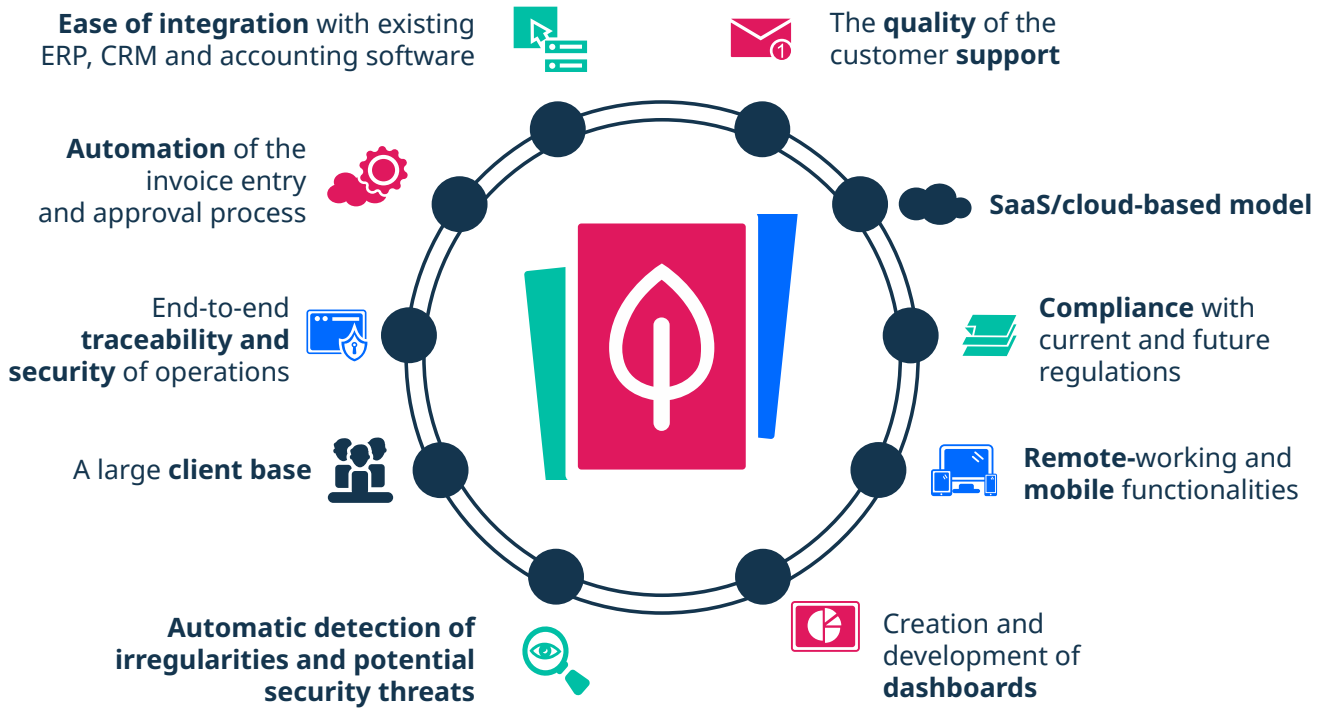




Tips: Use benchmark data to position yourself as a top performer!

KPI	Why is it key ?	Benchmark /target
Average invoice processing time	Operational efficiency	Fewer than 5 days
Average supplier payment time	Cash optimisation and strong supplier relationships	Adjusted to the sector
Ratio of invoices processed entirely automatically	Performance of your automation solution	80% or more
Processing cost per invoice	Operational cost control	£5 or less
Error or dispute rate	Quality and risk control	Less than 0.8%
Time taken to complete financial close	Financial responsiveness	Fewer than 5 days
Average approval time	Workflow fluidity	24-48 hours
Financial ESG score (if applicable)	Performance / Sustainability alignment	Stagnant Improving Unknown

3. Select the right solution: Criteria to consider



Here are the criteria you must consider

1. Automation capabilities

Automate key Accounts Payable and Purchase-to-Pay tasks such as invoice capture, data validation and purchase order matching.

Leverage AI, machine learning and big data to maximise automation. Avoid relying solely on classic OCR - Smart Data Extraction technology improves both accuracy and efficiency.

Include features that automatically detect errors, duplicates, or irregularities to reduce manual work and minimise risk.



Tip: Evaluate the solution in real use cases to confirm the ratio of invoices processed entirely automatically and the solution's capacity to handle complex invoices.

2. Integration and deployment

Favour cloud-based solutions over on-premises deployments to reduce implementation time and costs. Cloud solutions also benefit from automatic updates without extra effort or fees.

Ensure the solution seamlessly integrates with your ERP or accounting software and verify the flow and cadence of data exchange.

Look for plug-and-play implementation with options for customisation or expert support if needed.



Tip: Choose a solution offering native connection to multiple ERPs to future-proof your processes. If you change ERP, no need to change your entire processes!

3. User experience and employee adoption is critical

Choose a solution with an intuitive interface, offering features such as Google-like search and AI-assisted suggestions.

Consider mobility and remote access, enabling teams to work efficiently from anywhere.

Ensure the provider offers training, onboarding and ongoing support to maximise adoption.



Tip: Carry out a test phase with end-users to confirm usability before full deployment. Free trial periods can also help evaluate user-friendliness.

4. Traceability, security, and compliance

The solution should provide a complete audit trail and secure, compliant document archiving to ensure all actions and documents are traceable.

Access rights and document confidentiality should be strictly managed so users can only act within their authorised scope, maintaining proper segregation of duties.

Include fraud detection features to reduce operational risk.

Ensure the solution is fully compliant with local regulations and industry standards.



Tip: Choose a solution supported by a dedicated compliance team that keeps the system up-to-date with regulatory changes.

5. Reporting and analytics

Dashboards and customisable reports allow monitoring of KPIs, supplier performance and process bottlenecks.

Choose a solution that provides actionable insights without heavy manual work.



Tip: Confirm reporting tools allow both operational and strategic views to optimise processes and support decision-making.

6. Scalability and flexibility

Cloud-based solutions provide remote access, easier updates and scalability as your business grows.

Ensure the system can handle higher invoice volumes and additional workflows over time.

Review the pricing model: it should support growth in users and transaction volumes without hidden costs.



Tip: Consider future needs such as new business units, countries, or additional processes and ensure the solution can scale accordingly.



4. Plan your project

Once the previous steps have been completed, the final stage involves moving ahead and planning your automation project.



Each step in the process can vary in duration depending on several factors, including:

- The type of solution being implemented
- The complexity of your current processes
- Any required customisations or integration

If you choose the right solution, implementation could only take a few days and ROI could be immediate!



Tips: Make sure to ask whether the solution offers multiple variations of project implementation, for example 'turnkey standard implementation' or 'guided and 'customised implementation' with hands-on support throughout the project.

3



Real success stories
from leading UK
companies

FREENOW ✓

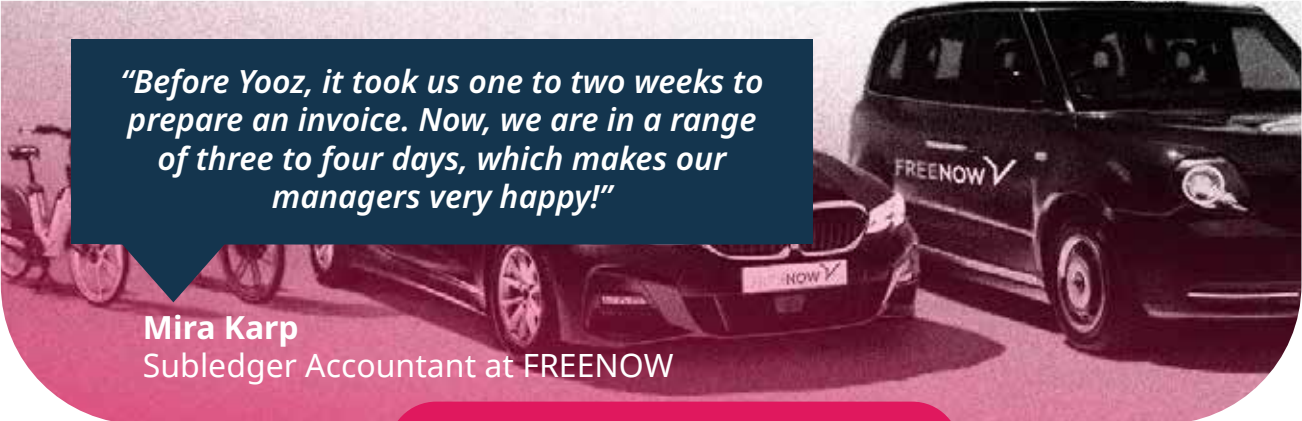
FREENOW chose Yooz to centralise their Accounts Payable workflow and reduce their invoice processing costs.

Location: Europe

ERP: Microsoft Dynamics Nav and Sage 1000

Industry Sector: Mobility

Staff: 700 employees



"Before Yooz, it took us one to two weeks to prepare an invoice. Now, we are in a range of three to four days, which makes our managers very happy!"

Mira Karp
Subledger Accountant at FREENOW

[Read the full success story](#)

FIVE GUYS

Five Guys UK has chosen Yooz to automate their Purchase-to-Pay (P2P) process.

Location: United Kingdom

ERP: Sage X3

Industry Sector: Hospitality

Staff: Around 1000 people



"Automating our invoice process with Yooz is guaranteeing total security and traceability of daily operations in all our restaurants in the UK and Spain."

Jen Kim
Finance Manager at Five Guys

[Read the full success story](#)

4

A smiling man in a suit is holding a white ID badge. The badge features the Yooz logo, which consists of the word "yooz" in a dark blue, lowercase sans-serif font, followed by a square icon containing a white Greek letter phi (φ) on a red background, with a blue square partially overlapping the right side of the red square.

yooz 

From purchase
to payment:
The Yooz way


Discover our all-in-one AP and P2P automation solution:

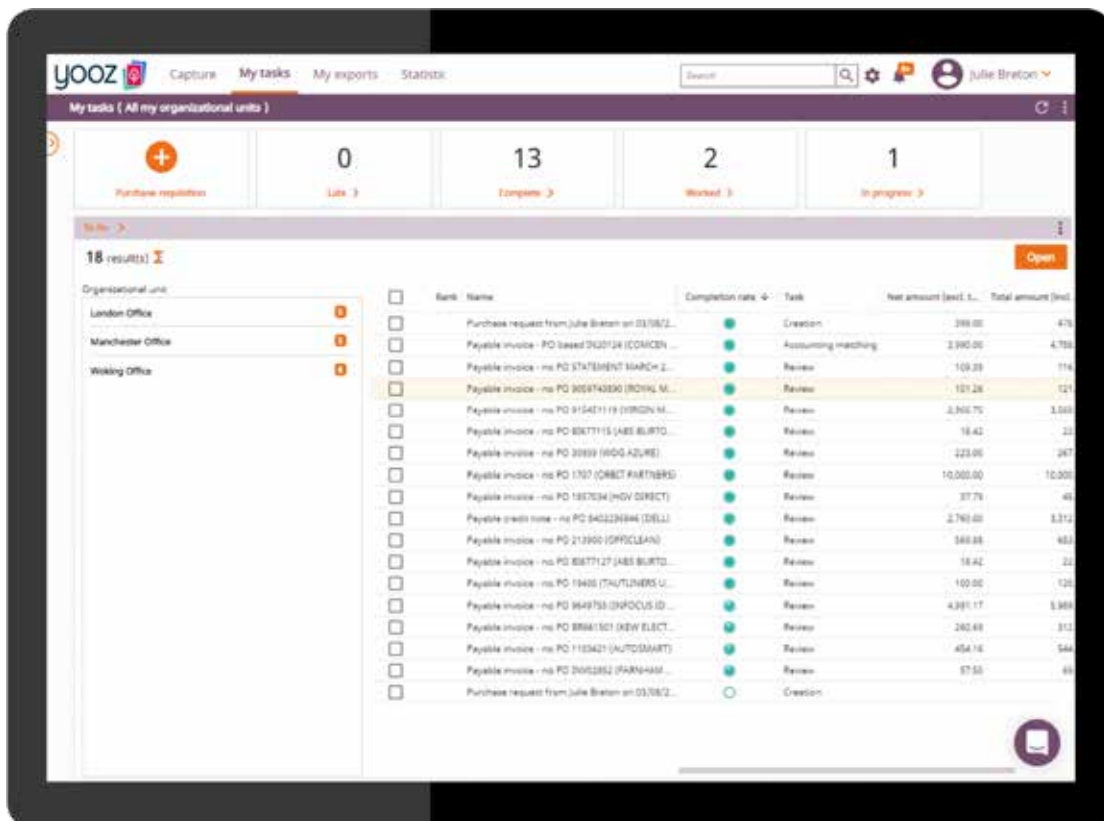
 Highest Return on automation

 Ultimate protection

 Infinitely adaptable

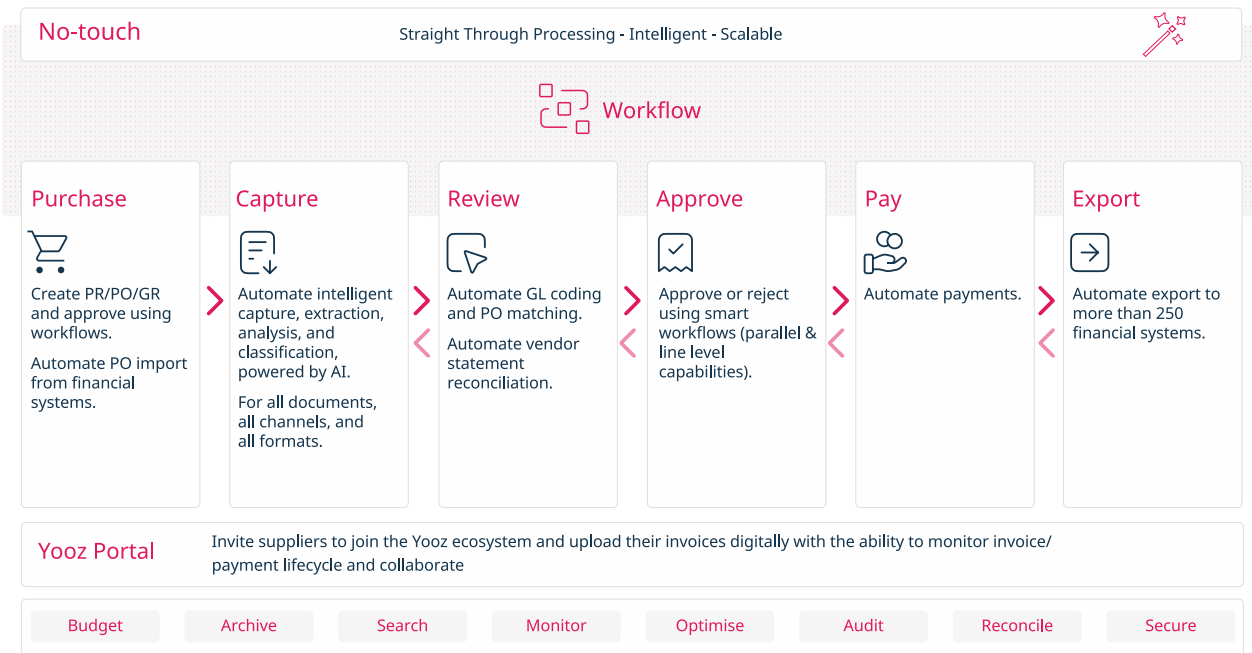
 Redefined simplicity

 Client obsessed



See how it all comes together in a fully automated, intelligent workflow - from purchase to payment and beyond.

Explore the Yooz difference in the diagram below:



Check out our flash demo

Recognised worldwide, recommended and used by the global finance and accounting ecosystem:



They trust Yooz



Conclusion

By following these steps and best practices, you're well on your way to transforming your P2P process with smart, scalable automation. You've seen what's possible when the right approach meets the right technology - now it's your turn to take the lead.

For more information or to see Yooz in action, visit our website or speak to one of our experts.

[Get in touch](#)



About Yooz

Yooz provides the smartest, most powerful and easiest-to-use cloudbased E-invoicing and Purchase-to-Pay (P2P) automation solution. It delivers unmatched savings, speed and security with affordable zero-risk subscriptions to more than 7,000 customers and 600,000 users worldwide.

Yooz's unique solution leverages Artificial Intelligence and RPA technologies to deliver an amazing level of automation with extreme simplicity, traceability and end-to-end customisable features. It simply integrates E-invoicing and AP Automation into information systems or ERPs with more than 250 native connectors, exceeding any other solution on the market.

Yooz is based in the US and Europe, with the UK Office located in London.

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To learn more about how Yooz can help you safeguard your AP process, visit [getyooz.com](https://www.getyooz.com).

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