Invoice automation evaluation checklist

Record the evidence, name an owner and agree the next action.

Organisation: _____ Owner: _____

System / workflow: _____ Review date: _____

- [ ] Name the invoice process owner and approval authority.
- [ ] Select varied suppliers, layouts and poor-quality scans.
- [ ] Include credit notes, duplicates and missing fields.
- [ ] Define expected values for each test document.
- [ ] Validate supplier identity, totals and required references.
- [ ] Record field-level errors and their business consequences.
- [ ] Route uncertain or invalid output for human review.
- [ ] Test ERP handover without duplicate posting.
- [ ] Measure handling and review time against a baseline.
- [ ] Agree release checks, monitoring, access and escalation.

Evidence / decisions / next actions

Read the guide and check the references before using this worksheet:
dyaustechnoservices.com/invoice-automation-evaluation-guide/

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