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Invoicing Software Evaluation Guide

Six questions every AR leader should ask before selecting a vendor

Most invoicing platforms send invoices. Few are built to get them paid faster. These six questions separate platforms that replace paper with PDFs from platforms that manage invoicing as an AR performance function — tracking delivery, surfacing payment signals, and feeding intelligence into the rest of the AR operation.

Q1 How many channels does the software deliver to, and how well does each one work?

Question to ask	"How many AP portals do you integrate with — and can we have the complete list? What happens to portals not on the list today? If our ERP produces one invoice structure and a buyer's portal requires another, does the platform reformat automatically or kick it back to AR?"
Why this matters	Buyers increasingly insist on receiving invoices through their own AP portals — Coupa, Ariba, Taulia, OpenInvoice, and hundreds of industry-specific ones. A platform that integrates with a handful of large portals but requires manual keying for the rest doesn't solve the efficiency problem; it relocates it. Channel coverage is only as strong as its weakest delivery path.
Strong answer looks like	The vendor delivers across email, print and mail, AP portals, and eInvoicing networks from one workflow — not separate modules. They share the full AP portal list, automatically reformat invoices to each portal's required structure, and show delivery and payment status at the invoice level without AR logging into each portal.
Billtrust's answer	Billtrust Invoicing delivers to 260+ AP portals, plus email, in-house print and mail, and the Buyer Payment Portal — all from one workflow. Billtrust manages the format requirements per portal, so AR doesn't reformat by hand. Delivery and payment status surface at the invoice level inside Workspace.

Q2 How does the platform handle eInvoicing compliance across the countries you operate in?

Question to ask	"Which countries do you issue compliant eInvoices in today, and which are on the roadmap? Does coverage include both Peppol-based networks and clearance-based models? How are new mandates handled — a product update or a services engagement? Who sits behind the compliance function: engineers or AR and tax practitioners?"
Why this matters	If the platform can't issue compliant invoices in a country where you sell, you can't recognize revenue there. Belgium, Germany, France, Poland, Spain, and the EU's ViDA package are all at different stages of rollout, and vendors behind the trends tend to stay behind. Some jurisdictions (Italy, Poland, Hungary, parts of LATAM) require clearance through a government platform before an invoice is even legally an invoice.
Strong answer looks like	The vendor names the specific countries covered, distinguishes Peppol coverage from clearance-model support, and can describe a recent mandate change and how quickly they updated the platform. The compliance function is led by AR and tax practitioners monitoring legislation as it's drafted — not engineers interpreting regulation after it ships.
Billtrust's answer	Billtrust eInvoicing automatically transforms, validates, and submits invoices in local formats across multiple countries with B2G mandates. The platform supports both Peppol-based networks and clearance-based models, with coverage that expands as new mandates take effect. Compliance is led by practitioners tracking regulation across jurisdictions, not retrofitted after the deadline.

Q3 How does the platform handle invoice data accuracy and per-buyer formatting?

Question to ask	"Does the platform synchronize with our ERP in real time? Can our AR team configure customer-specific tax rules, surcharging policies, delivery preferences, and PO formats themselves — or does every change require IT involvement? What percentage of customer-specific configurations can AR handle without a support ticket?"
Why this matters	Invoice data quality determines whether the invoice gets paid on first presentation, whether the buyer's AP approval succeeds, and whether cash application can reconcile the payment without manual intervention. Most platforms are good at delivery; data quality is where laggards and leaders diverge. A platform that requires IT involvement for every customer-specific format change quietly throttles the AR team.
Strong answer looks like	The vendor demonstrates real-time, ERP-agnostic synchronization and shows AR configuring customer-specific tax rules, surcharging policies, delivery preferences, and PO formats inside the platform — without IT. Edits to invoices and surcharging reminder statements are handled in the AR workflow.
Billtrust's answer	Billtrust Invoicing is ERP-agnostic with deep integrations to multiple ERPs and real-time data sync. AR teams configure customer-specific delivery, format, tax, and surcharging policies directly in Workspace — including portal settings — without raising a support ticket. Surcharging compliance with card network and state rules is automated across the workflow.

Q4 How does the platform help buyers make payment decisions and AR drive faster payments?

Question to ask	"Does the buyer-facing portal deliver payment recommendations — early-pay discount windows, surcharge impacts, optimal timing — or only display what the buyer owes? Can buyers self-enroll in Autopay, schedule payments, and open disputes without contacting our AR team? Are surcharging policies communicated clearly on the invoice itself?"
Why this matters	AP portals became the new way buyers receive invoices; buyer payment portals are becoming the new way they make payment decisions. A portal that only displays invoices reinforces inbound calls and email back-and-forth. A portal that guides the buyer toward smarter payment decisions actively accelerates cash flow.
Strong answer looks like	The vendor's buyer portal goes beyond display: it surfaces early-pay discount windows, calculates surcharge impacts, and recommends optimal payment timing based on the supplier's live policies — not generic best practices. Buyers self-serve on Autopay, scheduling, disputes, and multi-invoice payments. Recommendations stay current because invoicing, payments, and cash application share a data layer.
Billtrust's answer	The Billtrust Buyer Payment Portal delivers AI payment recommendations at the invoice level — early-pay discount capture, surcharge avoidance, and optimal timing — based on live supplier policies, updated daily. Buyers self-serve on ACH, debit, and credit payments, Autopay enrollment, scheduled and multi-invoice payments, disputes, and payment history. Because Invoicing, Payments, and Cash Application share a platform, guidance reflects current policy and remittance is matched back automatically.

Q5 What metrics does the platform give you to manage invoicing performance?

Question to ask	"Does the platform track eDelivery rate, on-time delivery rate, and first-time accuracy by customer and channel — not just aggregate volume? Can we see these metrics at the invoice and account level? Does the platform benchmark our performance against external network data, and how large is that network?"
Why this matters	DSO is a lagging indicator. By the time DSO declines, the invoicing failures that caused it are weeks old. Leading-indicator metrics — eDelivery rate, first-time accuracy, invoice-level days to pay, channel mix — let AR managers see how invoicing is working before DSO reveals that it isn't.
Strong answer looks like	The vendor surfaces leading-indicator metrics at the invoice and account level, segmentable by customer, channel, and timeframe. They benchmark performance against external network data so AR managers can compare against peers, not just trend their own numbers.
Billtrust's answer	Billtrust surfaces eDelivery rate, invoice status, and AP portal acceptance in Workspace, and benchmarks buyer payment behavior against the 13M+ buyers in the Billtrust Business Directory. Invoice and payment data also feed Cash Flow Forecasting, so invoicing performance shows up as a leading indicator of expected cash, not just a delivery report.

Q6 Does the software sit on a unified AR platform, or is it a standalone tool?

Question to ask	"Is invoicing built on the same data model as payments, cash application, collections, and credit — or are they separate systems with connectors? What happens to invoice-level data when a payment is applied, disputed, or escalated? If we add cash application or collections from the same vendor later, how much integration work is already done?"
Why this matters	Invoicing sits upstream of every other AR function. The quality of invoice data determines what downstream functions can do with it. On a standalone tool, every handoff to payments, cash application, collections, or credit requires manual reconciliation or integration work. A standalone tool can run AI locally; only a unified platform can run cross-functional AI.
Strong answer looks like	The vendor confirms invoicing runs on the same data model as the rest of AR — not a separate system with connectors. Invoice events (sent, viewed, paid, disputed, escalated) flow automatically into downstream functions. Adding other modules later doesn't require redoing the integration.
Billtrust's answer	Billtrust Invoicing runs on the same unified platform and data layer as Payments, Cash Application, Collections, and Credit — not separate systems with integrations between them. Sent-and-viewed invoices that don't get paid trigger Collections workflows with full invoice history attached. Partial remittance matches back automatically. Consistently short-paid buyers surface to Credit. Adding other modules later doesn't require integration rework.

How to use this guide

Ask every vendor the same six questions in the same order. Request answers in writing. Compare them side by side. The right vendor will be the one whose answers are specific, verifiable through references, and backed by independent validation.

See it in action

Tour Billtrust Invoicing with an AR expert and see AP portal delivery, eInvoicing compliance, the Buyer Payment Portal, and invoice-level analytics on real data. Visit **billtrust.com** to book a demo.