Pitney Bowes e-invoicing set-up process

Connecting Pitney Bowes e-invoicing to your organisation is a simple process and helps you to automate your Accounts Payable.

Read our short steps below to see just how straightforward it is to implement the Pitney Bowes e-invoicing solution.

1. Discover

The first thing we do is listen. Through face to face or online meetings, our specialists will work with you to understand your requirements (e.g. understanding your volume, example documents and systems) before we develop a comprehensive proposal. It will be completely tailored to suit your organisation, as we care about providing the right solution to meet your needs.

2. Document

Together we then complete our Project Initiation Document (PID) which provides the information needed to successfully take a project through to go live.

We take care of the technical details for you through the PID. It becomes our brief. The brief will cover questions such as:

- How will we get your inbound invoices into the e-invoicing solution?
- What data need to be extracted from these documents, and does this data require manipulation or validation rules?
- What data output type is required? Typically, this is in an XML, CSV or JSON but we can build other outputs.
- What method do we need to transfer the information into your FMS or ERP system?
- What are the data security requirements?
- Who are the suppliers that need to be set up? We will work with you to onboard them.

3. Develop

The Pitney Bowes team then moves into the build and testing phase; building the data acquisition and processing rules based on the information we received. When written, the supplier rules are managed by our team for the lifetime of the contract - any reasonable changes such as changes to invoice formats are free of charge.

The testing phase focuses on end-to-end and scenario testing to ensure the rules and processes function as required.

4. Deliver

When both parties are 100% happy, we go live. We can help you launch the new system to your suppliers (through our email campaign and phones calls if you haven't heard from them) as you'll need to get as many of them onboarded to see the maximum benefit. Many of your suppliers will already be sending your invoices via email, but we still need to tell them about the new process (typically a change in email address) and also encourage any suppliers still using paper and post, to email these over instead.

Any questions?
Please email: einvoicing@pb.com