



Connect suppliers to B2B e-bill

Best practice

PostFinance 

Foreword

Digitally structured invoices are becoming increasingly commonplace in everyday business. They enable end-to-end digital invoice exchange via software (ERP), benefiting both invoice recipients and invoice issuers in the B2B sector. PostFinance offers this modern invoicing solution as part of its Billing Solutions service under the name "B2B e-bill". To allow individual companies to fully harness the potential of the solution, as many participants as possible need to be connected to B2B e-bill. If your role is that of invoice recipient, the key to success lies in connecting your suppliers. How do you go about persuading enough suppliers to use digital bills?

Our best-practice documents help you to exploit the potential of B2B e-bill and support you in the next step of connecting your suppliers.

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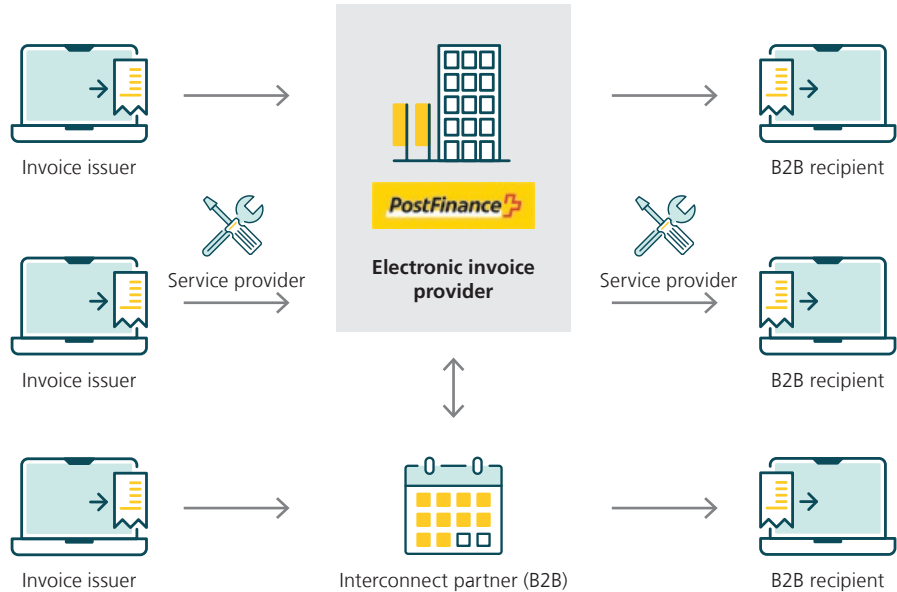


Background

In the past, sending and receiving invoices was straightforward: the sender printed out the document, sent it by post and could assume that the invoice would reach the recipient a few days later – and that the recipient could enter it in the system and approve it for payment. But in an increasingly digitized world, a rapidly growing number of companies now rely on electronic invoice exchange. This not only saves time, but also cuts costs.

Digitally structured invoices offer huge potential if used correctly, especially in the B2B sector.

In the following chapters, we explain to you the targeted procedure that will enable you to further exploit this potential step by step in your company by connecting suppliers.



Electronic invoice exchange between companies also works via different channels.

Procedure for connecting suppliers



1

Explain benefits

Compile a list of advantages that B2B e-bill offers you as an invoice recipient. This line of reasoning will help you to illustrate the importance of connecting suppliers and the urgency of the project internally. The biggest advantages include:

- Higher process quality in accounts payable management, which saves time and money
- A lower error rate because invoices are transmitted electronically, meaning there is no need to keep entering invoice data manually
- Automation, which enhances transparency and simplicity, as actions can be traced and, on request, electronically archived
- Greater customer satisfaction thanks to quicker *payment processes*
- Positioning as a modern, sustainable client



2

Set goals

- How many customers does your company want to connect over what time frame?
- What stages will be needed for your company to achieve this goal?



3

Define resources, tasks and responsibilities

- What internal resources do you need in purchasing and accounts payable management to connect suppliers?
- Do you want to adapt certain regulations (e.g. GTC)?
- What tasks will need to be completed?
- Who will assume overall responsibility?
- Who will be responsible for individual tasks?



4

Compile a priority list of the suppliers you wish to connect

What suppliers does your company want to connect as a priority?

Possible decision criteria:

- The number of invoices being processed via supplier X
- The importance of the supplier to your company
- How easy it is to connect the supplier (see point 6)



5

Plan communication measures

- At what point will you contact your suppliers to tell them you would like to connect them to B2B e-bill?
- What channels will you use to inform your suppliers (combination of letter, e-mail, newsletter, personal discussion etc.)?
- At what point will you follow up?



6

Implementation

The amount of work required to connect individual suppliers will depend on whether or not a supplier already uses B2B e-bill.

Connect suppliers who already use B2B e-bill

It is particularly easy to connect suppliers who already use electronic invoices and who are entered in the eDirectory.

Step 1: Based on your priority list, compare your suppliers against the eDirectory and filter out those suppliers who are registered in it for B2B e-bill.

Step 2: Notify the suppliers from the eDirectory with a letter that includes the following points:

- Inform your suppliers that you, as a customer, receive supplier invoices electronically via the PostFinance interface, and give them your Payer ID.
- Ask your suppliers to send a B2B e-bill to your Payer ID, with prior information (before sending the first invoice) by e-mail.

Supplier directory: how to easily find suppliers that already use B2B e-bill

In the eDirectory.ch registry, you will find the majority of business partners domiciled in Switzerland who send and/or receive e-bills, and who work with a service provider listed in eDirectory.ch – such as PostFinance. → [edirectory.ch](https://www.edirectory.ch)

Tip: check if your own company is listed in the eDirectory. If you do not find an entry, inform your e-invoicing service provider so that they can enter the data.

Step 3: Check if the supplier invoice has been received successfully, and then ask the supplier to send all their invoices digitally in future.

Recommendation: not all companies that work with e-bill are registered in the eDirectory. Do you have suppliers on your priority list who are not in the eDirectory? If so, it is a good idea to ask these suppliers directly whether they use B2B e-bill, and whether they could send you their Payer ID.

Connect suppliers who do not use B2B e-bill yet

Connecting suppliers who do not use electronic invoices involves more work. Important distinctions:

- | | |
|-----------|---|
| Suppliers | ... who use software (ERP) that has an interface to PostFinance's B2B e-bill. |
| | ... who use software (ERP) that does not (yet) have an interface to PostFinance's B2B e-bill. |
| | ... who do not use software (ERP) for invoicing. |

The procedure for connecting these suppliers to B2B e-bill varies, depending on the case:

- | | |
|-----------|--|
| Suppliers | ... who use software that has an interface to PostFinance's B2B e-bill: tell these suppliers that you would like to switch to electronic invoicing as a customer. Also be sure to ask these customers to get in touch with their software partners, who can help them to get connected. Go to → software partners that offer a standardized interface for B2B e-bill |
| | ... who use software that does not have an interface to PostFinance's B2B e-bill: tell these suppliers that you would like to switch to electronic invoicing as a customer. Ask them to get in touch with their software partners to set up an interface with e-bill. |
| | ... who do not use software: let these suppliers know that you as a customer want to use B2B e-bill and suggest our free e-invoicing portal . This is where suppliers can individually upload or manually enter their PDF invoices and send them as B2B e-bills. |

Win people over to B2B e-bill: here are the benefits for your suppliers

You should, in any case, be mindful of the fact that switching to electronic accounts payable invoices does mean additional work. There is often a fear that high investment costs will be incurred, and that major interventions will be required in processes and IT. Counter these fears by emphasizing the multiple benefits of electronic accounts payable invoices, which go beyond saving on printing and shipping costs:



Quicker receipt of payments

With electronic invoice transfer, the supplier sends the invoice directly to the customer's accounting/ERP system. Seeing as this accelerates control, approval and payment process, the money will generally reach the supplier's account more quickly than with a paper invoice.



Higher productivity

The whole invoice process is made more efficient overall. This means suppliers save time and gain capacity that they can channel elsewhere, adding value in the process.



High degree of transparency

Digital invoices are traceable, end to end.



Lower costs

Suppliers save money on paper, printing and postage. Switching to B2B e-bill also pays off financially.



Fewer errors

Seeing as manual work steps are done away with, the susceptibility for errors in invoice issuing is reduced. As a result, the customer does not have to reject invoices as much, which saves time and stress for both parties.



Eco-friendliness

With B2B e-bills, suppliers are helping to protect the environment.

Keep at it – it's well worth it

Connecting your suppliers to B2B e-bill will pay off for your company in the long term. The more suppliers you're able to win over to B2B e-bill, the more comprehensively you will be able to digitize your processes for exchanging invoices, and so the more you will be able to benefit from electronic invoicing.

Think about how you can keep drawing your suppliers' attention to the B2B e-bill option. Is there an exchange platform where you can do this on a regular basis? Are you able to adapt the memorandum of understanding with your suppliers so that they can request to use e-bills?

You can also network with other companies in your sector. You may have similar challenges and be able to find solutions together.

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