



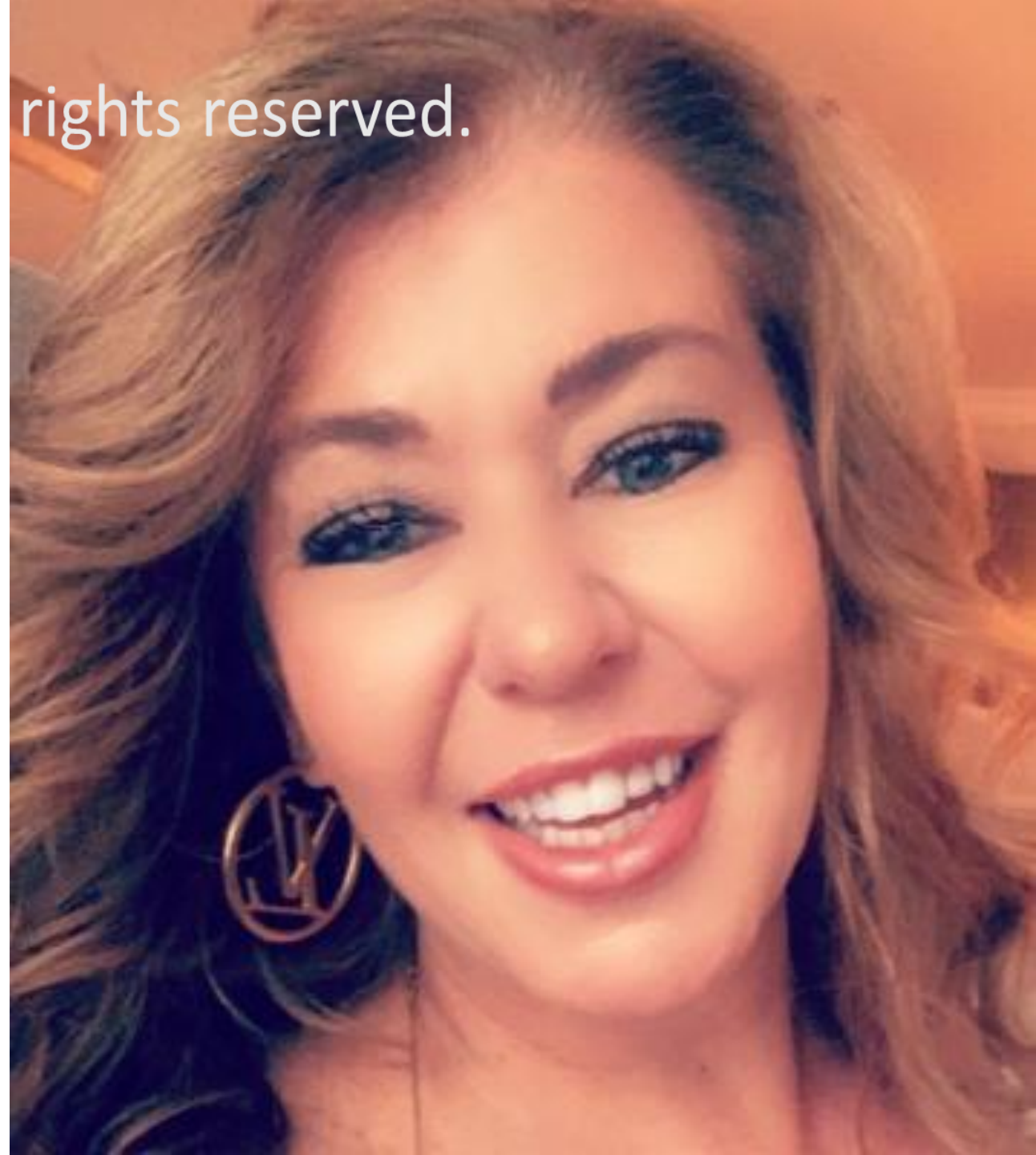
Mastering Invoicing Compliance: Navigating Portal Billing, Retainage, and e-Invoicing Mandates



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Sarah-Jayne Martin, Director, ICA Global AR Practice

- 20+ years of AR experience
- owned many AP-related initiatives
- Home base is chilly Chicago



Agenda

1

Common invoicing pitfalls

2

Portal billing best practices

3

Retainage billing complexities

4

e-invoicing mandates and
compliance strategies

5

A word about tariffs

What do these numbers mean?

55

43

38

Nothing good!

55%

Invoices in the US

paid late

43 days

Average wait

for payment

38 days

Median

number of days across industries to
get paid

You MUST assimilate

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Vendor portals **01**

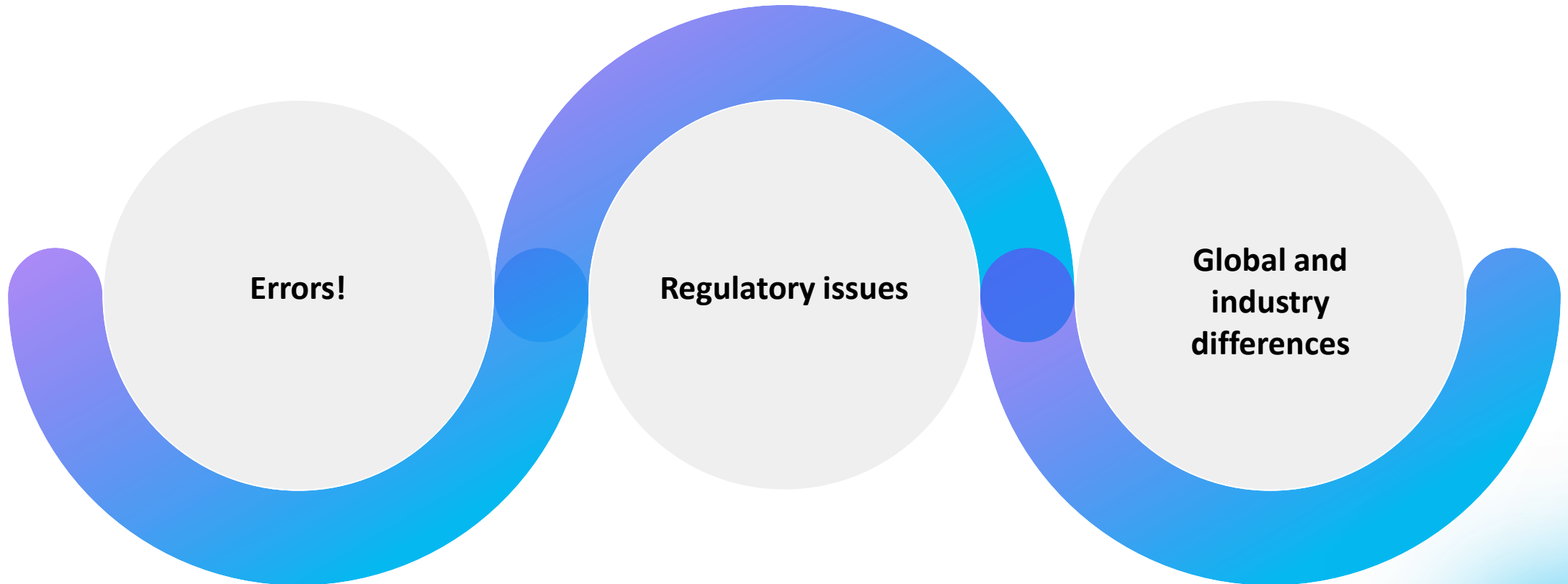
Retainage billing **02**

e-invoicing **03**

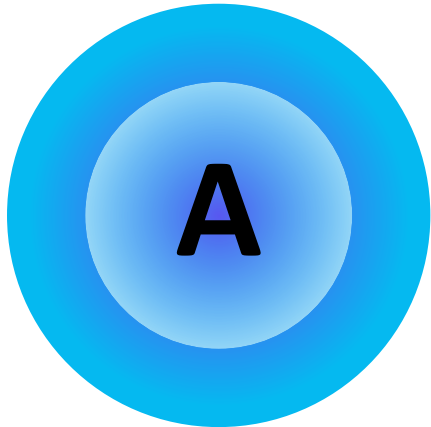
Tariffs **04**



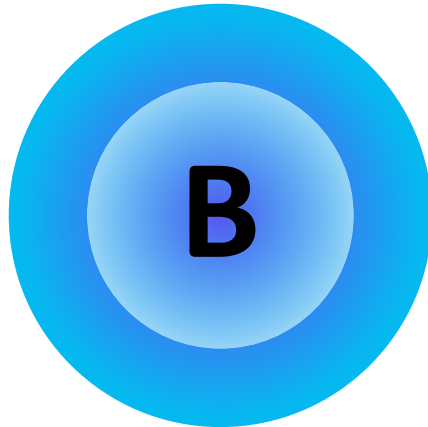
Common invoicing pitfalls and risks



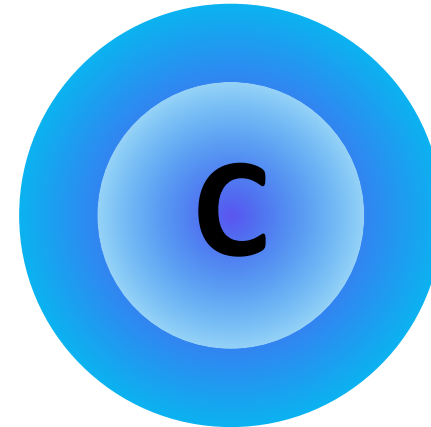
Poll #1: Which invoicing pitfall is the most concerning for you?



Errors



Regulatory Issues



Global and industry
differences

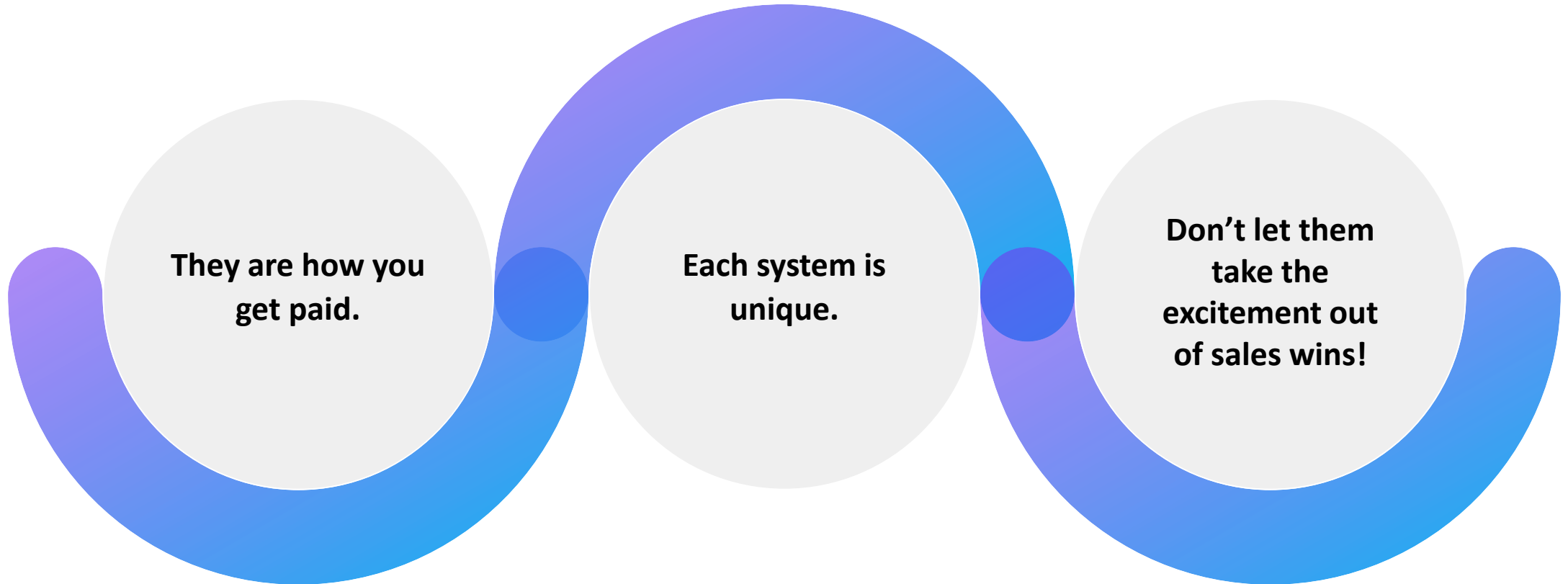
AP portals: Why are they all the rage?



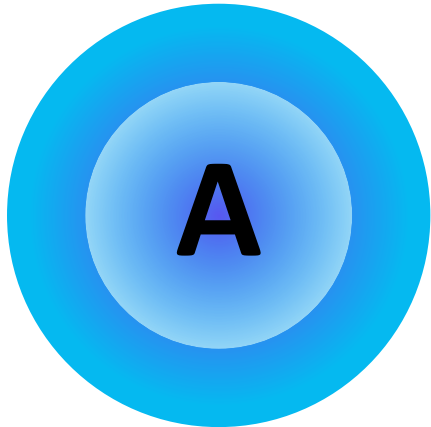
“An AP portal is an online platform that helps businesses automate and streamline the process of managing incoming invoices for accounts payable.”



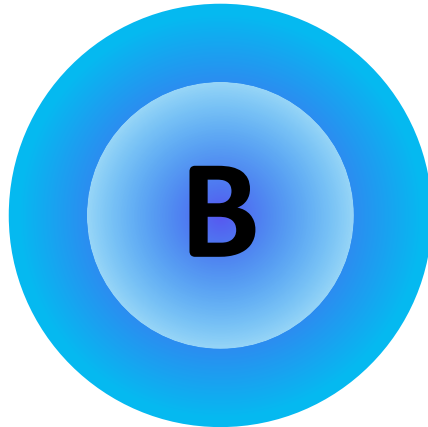
AP portals can't be ignored!



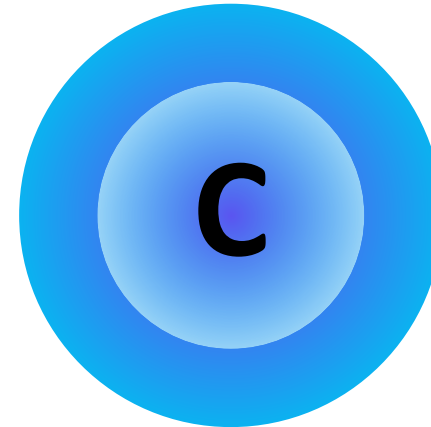
Poll # 2: How many AP portals do you think are out there?



Less than 100



Less than 150



More than 200



How to survive AP portals

Key challenges

- Data entry mistakes
- Integration issues
- Payment delays

Best practices

- Automate submission
- Know the rules
- Track in real time



Poll #3: Do you currently issue any retainage invoices?





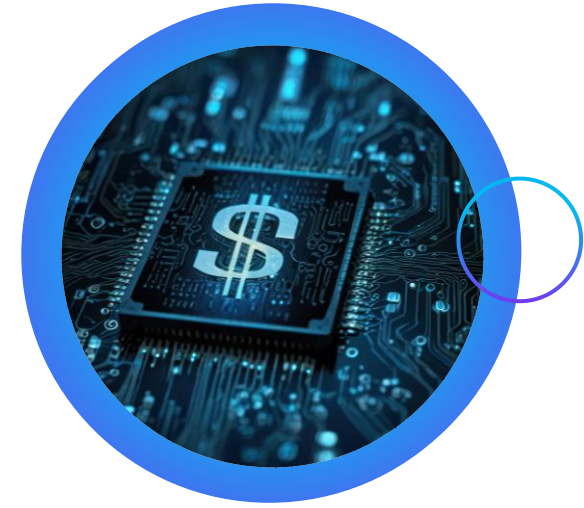
What's all the fuss about?



Various verticals embrace it



Mutual assurances



Cash flow implications





How to survive retainage billing practices

Key challenges

- Contract language
- Incorrect calculations

Best practices

- Take a different approach
- Automate what you can
- Align processes with terms



e-invoicing is the exchange of invoice documents in a structured electronic format between a supplier and a buyer.

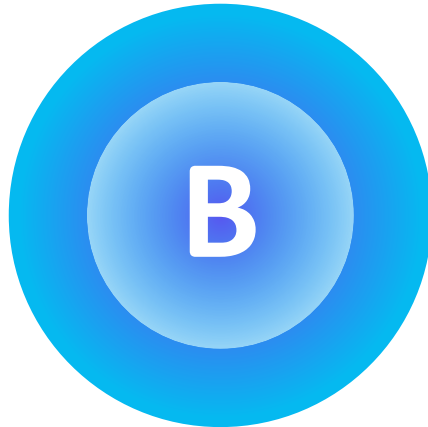




Poll #4: How many countries do you think are moving to e-invoicing?



Less than 50



Between 51 and 100



More than 100



e-invoicing is a balancing act



**Increase operational
burden**



Better collections



**Accelerated
payments**





How to survive e-invoicing mandates

Key challenges

- Required invoice formats
- Real-time reporting and validation
- Use of government technologies and protocols

Best practices

- Know the rules
- Automate and integrate
- Look toward the future while focusing on the present

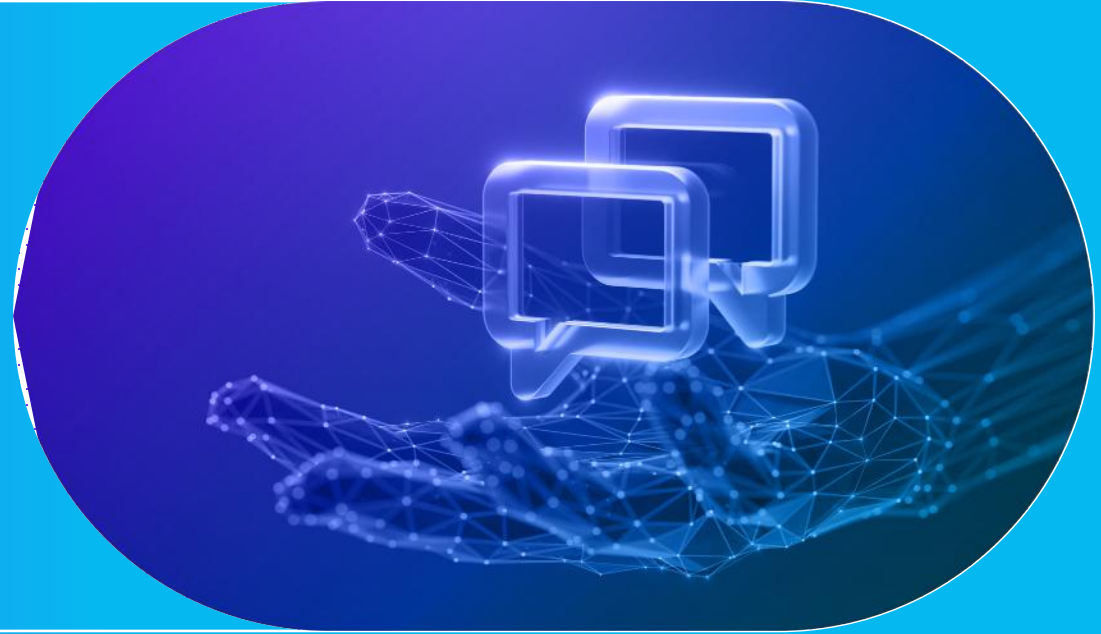
Portals can help with tariffs



- 1 Add standardized fields
- 2 Update dynamically
- 3 Dispute at the line-item level
- 4 Track disputed or declined charges



Q&A



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Thank you!



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