

Finance operations

Contractor invoice automation checklist

From the field note "[Contractor invoice automation: from the monthly HR sheet to paid, without retyping](#)".

The short version

- ◇ Good **contractor invoice automation** starts from data finance already trusts: invoices arrive pre-filled from the HR sheet, and contractors confirm or flag them.
- ◇ Early submissions go to a waiting room where each line is labeled match, mismatch or addition.
- ◇ When the formula and the spreadsheet disagree, finance picks the winner once, and later recalculations respect that choice.
- ◇ Freeze VAT per invoice, send bank changes to finance for approval, and give background jobs retries and a dead-letter queue.

The checklist

- ☐ Name one source of truth for each figure and pre-fill invoices from it.
- ☐ Recalculate amounts in code and flag differences before release.
- ☐ Store finance's "which source wins" choice as an override.
- ☐ Return every skipped row with a reason.
- ☐ Let the database block duplicate live invoices.
- ☐ Match VAT rules exactly, surface invoices with no match, and snapshot the result.
- ☐ Validate IBANs in one shared module, encrypt bank fields, and hold changes until finance approves.
- ☐ Let cron publish and workers execute, with retries, a dead-letter queue and skip alerts.

Want a second pair of eyes on your answers?

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