

Automated Vendor Management

Say goodbye to manual emails, tax forms, and data entry!
Leverage Gappify Alan to automate vendor setup & updates in a SOX-friendly way.



1

Find & Email Vendors

Find new vendors in NetSuite, or your team can assign specific vendors for Alan to update.



2

Request Relevant Details

Alan requests data relevant for each vendor (e.g., IRS Form W-9 attached only for U.S. entities).



3

Validate Vendor Inputs

When vendors submit their info, Alan validates the data (e.g., US TIN = 6 digits, IRS TIN check).



4

Auto-update NetSuite

Alan updates NetSuite with data collected, with specific flagging (e.g., 1099 eligibility, TIN mismatch)



5

Refresh & Renew

Update existing vendors, as well as annual refreshes to ensure vendor data is still current.

IRS COMPLIANCE & SOX CONTROLS

ABOUT GAPPIFY

Gappify is a cloud-based provider of process automation for mid-market and enterprise accounting teams.

Our digital worker, Alan integrates into NetSuite and SAP to initiate and complete various routine tasks. Thanks to Alan, companies are able to leverage highly-skilled accountants to focus on more value-add work. Gappify is proud to be SOC1, SOC2 and EU Privacy Shield certified. Our customers include Reddit, Dropbox, Calm, Pinterest, Xert, Ginger, Colibra, SurveyMonkey and Twilio.

For more information, visit www.gappify.com



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"Gappify's automation has made a big impact on our AP team, reducing the time spent to onboard new vendors and process information in NetSuite."



Enrique Magana
SVP Finance at RPX

Schedule a Demo:
+1 (415) 523 0305
www.gappify.com/demo

Manual vs. Automated Vendor Management (Gappify Alan)

Step 1. Find & Email Vendors

CURRENT: Emails manually sent to vendors with Excel/PDF forms to be completed.
Risk: Minimal tracking/visibility with AP email tracking.

Auto-initiate new vendor setup requests as triggered in NetSuite.
Benefits: Web-based forms superior to Excel/PDF.

Step 2. Request Relevant Details

CURRENT: Regional Excel/PDF forms sent to vendors, and specific tax forms are requested as applicable for each vendor.
Risk: Incorrect instructions or data collected is irrelevant.

Rules-based automation determines forms/data to collect by each vendor. No manual determination needed.
Benefits: Automation results in 100% compliance.

Step 3. Validate Vendor Inputs

CURRENT: Manual reviewed as entered into ERP, or no validation performed at all.

Rules-based validation, including external database checks (e.g., IRS TIN matching).

Step 4. Auto-update NetSuite

CURRENT: As forms received from vendors, AP manually checks and enters each data manually in ERP.
Risk: Input errors, inefficient entries, processing delays.

Auto-updates vendor record with details provided by vendor and flags AP for exceptions (e.g., TIN mismatch)
Benefits: 100% compliance with 1099 reporting eligibility.

Step 5. Refresh & Renew

CURRENT: Performed on an as-needed basis and manually (via email and Excel/PDF forms).

As needed and/or on a preset schedule, requests updates from vendors to ensure vendor data is current.