

HOW TO CHOOSE THE RIGHT DOCUMENT AUTOMATION TOOL FOR YOUR LOGISTICS TEAM

CHECKLIST

1 WORKS WITH YOUR EXISTING TOOLS

- If your daily work happens in Gmail, Drive, Sheets, and PDFs, the automation layer should sit on top of that — not replace everything.



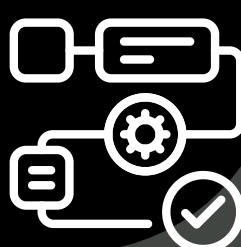
2 HANDLES ALL YOUR DOCUMENT TYPES

- **Invoices, POs, packing slips, vendor price lists, order forms, delivery notes...** Make sure it supports messy, inconsistent formats (because suppliers don't send clean data).



3 AUTOMATES THE WHOLE WORKFLOW, NOT JUST EXTRACTION

- Data extraction alone isn't enough. You need routing, comparisons, approvals, notifications, updates to Sheets/ERP, etc.



4 NO-CODE OR LOW-CODE — OPS SHOULD MANAGE IT, NOT IT

- Ops teams need solutions they can manage themselves. If it requires scripting or implementation partners — it won't scale.



5 CAN HANDLE EXCEPTIONS AND VALIDATE DOCUMENTS AUTOMATICALLY

- Most delays come from mismatches. Your tool should be able to validate incoming documents against the expected results and flag issues instantly so your team only reviews what matters.



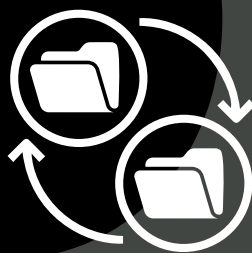
6 SCALES WITH VOLUME WITHOUT INCREASING COSTS

- Look for predictable pricing — ideally not per document or per user.



7 OFFERS CLEAR VERSION CONTROL AND AUDITABILITY

- Key question — Can we audit processes end-to-end? Choose a solution that would provide traceable updates, approval history, version changes history (especially price lists), easy retrieval of documents and tamper-proof logs.



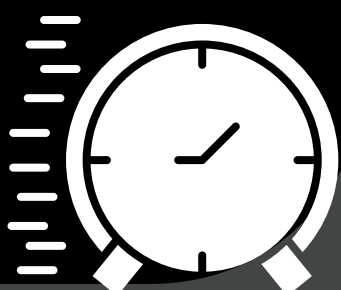
8 STRONG SECURITY AND COMPLIANCE

- Check for GDPR compliance, data residency options, role-based access control, encryption at rest and in transit. Key question is: is this tool secure enough to handle sensitive vendor and customer data?



9 QUICK DEPLOYMENT — WEEKS, NOT MONTHS

- Logistics can't wait for long integrations. The right tool should deploy fast and require minimal learning curve. Key question: Can we automate our first workflow in under 2 weeks?



LEARN MORE FROM AUTOMATION EXPERTS

If you're reviewing tools for 2026 and want to reduce manual PO checks, price-list updates, and invoice work, this checklist is a good place to start.

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