



Finance Automation Readiness Checklist for Business Central

Readiness and priority areas.



This checklist helps finance teams identify whether your workflows, ownership, and visibility are ready for automation to actually work inside Business Central.

It is designed to surface friction early so automation reduces rework and risk rather than layering on complexity.

How to Use This Checklist

- Review each section with your finance team
- Answer honestly based on how work happens today
- There are no right or wrong answers
- Items you cannot confidently check are your automation starting points

1. Workflow Ownership and Accountability

Automation depends on clarity. If ownership is unclear, automation stalls.

- ☐ Each AP, AR, and close task has a clearly defined owner
- ☐ Ownership does not change informally when someone is unavailable
- ☐ When a task stalls, the next action and owner are obvious
- ☐ Finance leadership can identify who owns exception resolution
- ☐ Responsibility lives in the workflow, not in people's heads

If unchecked: Automation will still require manual follow-up.

2. Approval Logic and Thresholds

Approvals should exist to manage risk, not volume.

- ☐ Approval thresholds are documented and consistently applied
- ☐ Low-risk transactions do not receive the same scrutiny as exceptions
- ☐ Approvers understand timing expectations
- ☐ Approvals are designed around decision points, not habits
- ☐ Finance does not rely on email or spreadsheets to track approval status

If unchecked: Automation will increase waiting, not speed.

3. Exception Definition and Handling

Automation only works when exceptions are intentional.

- ☐ The team can clearly define what qualifies as an exception
- ☐ Exceptions are surfaced early, not discovered late
- ☐ Exception resolution paths are consistent
- ☐ Routine transactions are allowed to flow without manual review
- ☐ Exception handling does not require offline tracking

If unchecked: Automation will push risk outside the system.

4. Visibility Into Work in Progress

Finance automation fails when progress is invisible.

- ☐ Finance leaders can see AP, AR, and close status without asking
- ☐ Reconciliation progress is visible during close, not after
- ☐ Bottlenecks are identifiable before they cause delays
- ☐ Status is visible inside workflows, not spreadsheets
- ☐ Visibility does not rely on meetings or manual reporting

If unchecked: Teams will maintain parallel controls.

5. Month-End Close Coordination

Close is a workflow, not an event.

- ☐ Close tasks have clear sequencing and dependencies
- ☐ Reconciliations are assigned and tracked consistently
- ☐ Journal entry review timing is predictable
- ☐ Late close issues are rare and explainable
- ☐ The team experiences fewer last-minute adjustments

If unchecked: Automation will not reduce close pressure.

6. Reliance on Spreadsheets

Spreadsheets indicate where workflows need attention.

- ☐ Spreadsheets support analysis, not execution
- ☐ Close checklists are not the primary control mechanism
- ☐ Exception tracking is not spreadsheet-driven
- ☐ Offline tools are not required to understand status
- ☐ Removing a spreadsheet would not break the process

If unchecked: Workflow gaps still exist.

7. Readiness for Sustainable Automation

Automation should reduce rework, not shift it.

- ☐ The team trusts workflow outcomes
- ☐ Automation supports decision-making
- ☐ Manual intervention is reserved for exceptions
- ☐ Processes are stable enough to automate
- ☐ Finance leaders feel confident scaling current workflows

If unchecked: Automation should pause until foundations are addressed.

What This Checklist Is Telling You

Unchecked items do not indicate failure.

They indicate where automation should start, not where it should be forced.

Most Business Central finance teams are partially ready. The goal is not perfection. It is disciplined workflows, clear ownership, and visible progress.

A Practical Next Step

If several items in this checklist raised questions, that is expected.

Most finance teams we work with are not missing tools, they are missing alignment across AP, AR, and close workflows. That is where automation either delivers real value or creates more complexity.

If you are ready to take the next step, you have two options:

[Book Your Business Optimization Review](#)

Walk through your current finance processes with a solutions expert and identify where automation can reduce effort, improve visibility, and strengthen control.

[Join Our Next Finance Automation Workshop](#)

See how finance teams are addressing these gaps across AP, AR, and close in a practical, workflow-focused session.

Automation works best when finance teams are ready for it. This is where that clarity starts.



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