VERSAPAY

Your path from Billtrust to Versapay

A practical guide to migrating with confidence

You know there is a better way forward. The question is how to get there without creating unnecessary risk.

From contract to cash in 90-days

Versapay's proven migration methodology delivers fast time-to-value with minimal disruption so your team can start seeing results this quarter.

For finance and accounts receivable (AR) teams, the challenge is not recognizing the limits of a legacy automation platform. It is getting comfortable with what comes next. Changing receivables systems can feel disruptive, resource-intensive, and politically risky, especially when internal teams are already stretched.

This guide is designed to make that decision easier.

It is not a technical manual. It is a practical overview of how teams move from Billtrust to Versapay with a clear path, limited disruption, and support at every step. It is also meant to help internal champions explain the move to colleagues in finance, IT, and leadership.

The short version: migration does not have to mean starting over. In many cases, Versapay can work with the files and processes you already use today, helping your team move faster with less burden on IT.

Why finance teams start looking for an alternative

Many organizations using Billtrust didn't actively choose the platform; they inherited it. And while that platform may have served a purpose at one time, many finance teams have reached a point where the experience no longer matches what the business needs.

Common frustrations include:

- Too much manual work
- Limited collaboration across accounts receivable processes
- A user experience that limits adoption
- Support that feels transactional instead of strategic
- Modernization efforts that feel slow, expensive or difficult to prioritize

Most teams are not looking for a complicated transformation project. They are looking for a practical path forward: less disruption, a manageable lift for internal teams, and a partner to help guide the move from planning to go-live.

Why migration can be more manageable than you think

One of the biggest misconceptions about switching accounts receivable automation platforms is that it requires a complete redesign of your current setup.

In many cases it does not.

For teams moving from Billtrust, Versapay can often support the file-based integration approach you use today. That means there may be no need to change what you already export, and we can replicate the feedback you currently import. Your team does not have to reinvent the process just to move forward.

What that means for your team

You do not need to start with a full API project if that is not the right fit today. You may be able to move using your current file-based approach first. Your IT team's role can stay focused and contained. You can modernize in phases rather than all at once.

> "Getting up and running with Versapay was seamless. The implementation process went incredibly smooth and knowing we had a dedicated person at Versapay to support us through it was huge. **The Versapay team is phenomenal.** They are a true example of what customer service looks like."
>
> **Shirley Grimes**, Accounts Receivable Supervisor, Gulf Coast Panama Jack

Move with confidence

What switching to Versapay actually looks like.

	Your current platform	What Versapay delivers
Platform architecture	Separate modules with distinct logins, limited data sharing, and expensive middleware required for ERP integration	A connected platform where invoicing, collections, cash application, and payments share context — no middleware, no manual stitching
Cash application	Match rates at or below 60%, with high exception volumes requiring manual review and inbox triage	AI-powered matching with 90%+ processing rates, fewer exceptions, and faster postings
Support model	Ticket queues, first-come, first-served triage, limited strategic guidance, and support that's disconnected from outcomes	From implementation through go-live and beyond, you have named contacts, a clear roadmap, and a team that measures its success by yours, not by ticket resolution time
Implementation	Time-and-materials billing, extended timelines, and a high internal lift requirement from IT	From contract-to-cash in 90-days, and a dedicated implementation team that owns the outcome alongside you
Ongoing partnership	Reactive support that responds to problems after they surface	Proactive guidance: roadmaps, check-ins, and a team that stays accountable through adoption, not just go-live

A practical migration path

STEP 1

Align on goals and current-state realities

We start by understanding your current Billtrust setup, your priorities, and the business outcomes youwant to improve. This is where we make sure the migration path reflects your environment, not a generic implementation template.

STEP 2

Map your current files and workflows

Where possible, we work with the data outputs and file structures you already use today. The goal is to minimize rework, reduce burden on IT and shorten the path to value.

STEP 3

Configure and validate

Our team configures your environment, aligns integrations, and validates data and workflows in a non-production setting. Your team stays involved, but the process is designed so that the heavy lifting does not sit with you.

STEP 4

Test and prepare your team

We guide user acceptance testing, training and rollout planning so the people who will use the platform are prepared before go-live.

STEP 5

Go live with support

We support the transition into production, complete the final validation and help your team through launch so you are not left managing the switchover on your own.

The goal throughout

A migration path that is clear, contained, and well supported, not a drawn-out project with open ended complexity.

What your internal team will want to know

For IT

The first question is usually, "how much work is this really going to create?" The answer should be reassuring. Where file-based integration is the right fit, the goal is to minimize changes to current exports and imports and avoid unnecessary customizations. That helps keep the lift focused and manageable.

For finance leadership

This is not just a platform decision. It is an operation model decision. The business case is stronger when the path to implementation feels realistic, the timeline feels bounded, and the post go-live value is clear.

For accounts receivable leaders

The move should not feel like taking on a second full-time job. The process is structured so your team has visibility into what is happening, knows when input is needed, and gets training before go-live.

For executive sponsors

Internal momentum often depends on confidence. Teams need to know there is a credible path, clear ownership, and a partner who will stay engaged after the contract is signed.

> "**Versapay's support team is wonderful.** I cannot say enough good things about them. Their developers have always been able to accommodate requests and answer questions, and their communication is always impeccable."
>
> **Sara French**, Cash Application Manager, Madison Resources

How Versapay supports your migration

We are not just providing software. We are providing a guided path from decision to adoption, partnering with you every step of the way. At Versapay, support isn't a department you escalate to. It's built into our very fabric. From implementation through go-live and beyond, you have named contacts, a clear roadmap, and a team that measures its success by yours, not by ticket resolution time.

> "Any time I call Versapay, they're **extremely helpful in finding the right solution in a timely manner** and looping in any other necessary teams to help find a solution."
>
> **Hakki Isik,** CEO, TrimaxSecure

Your team will work with a dedicated:

Implementation Manager — your primary point of contact, with deep experience in Billtrust migrations,who coordinates the project and keeps milestones on track.

Implementation Specialist — who leads technical setup, data mapping, and connector configuration. They'll work directly with your IT team to ensure a seamless integration.

Solution Engineer — who helps ensure continuity from the sales process into delivery.

Customer Success Manager — who supports adoption, provides ongoing support, and help you unlock long-term value.

Support team — that's available 24/7 and located in North America. They help resolve issues and keep your operations running.

How your team gets up to speed

A successful migration is not just about moving data and workflows. It is also about making sure your team feels prepared, supported, and confident using the platform. Our results-driven partnership means we collaborate with you to define clear, measurable goals, and build customized roadmaps for achieving them.

Training tailored to the people who will use it

Different teams use the platform in different ways. That is why Versapay's training is designed around roles and responsibilities, so users can focus on what matters the most.

Resources your team can return to

Not every question comes up during training. Teams also benefit from having access to practical resources they can use after rollout as they settle into new workflows. That gives users a way to reinforce what they have learned and get answers as questions arise.

Support that continues after go-live

Go-live is an important milestone, but it is not the end of the process. Your team continues to have support after launch, including help with adoption, questions and ongoing support from the customer success team.

What Versapay does, and what we ask from you

A strong migration story does not hide the fact that your team will have responsibilities. It shows that those responsibilities are clear and limited.

What Versapay owns

- Project coordination
- Setup, configuration, and data mapping
- Integration and testing support
- Training and go-live guidance

What we ask from your team

- Provide a project lead or point person
- Grant access to current sample files and workflow inputs
- Participate in key workshops and validation steps
- Participate in user acceptance testing, and final go-live approval

We provide templates, checklists, and weekly updates to keep everyone aligned.

How Versapay helps lower migration risk

The concern is rarely whether a migration can happen. The real concern is whether it can happen without creating more pain than it solves.

Continuity where possible

We do not force change for its own sake. If your current file-based approach can support a faster path, we can use it.

Structured checkpoints

The migration is not a black box. There are defined phases, validation points and signoffs along the way.

Heavy lifting on our side

Our team is built to guide the process and absorb complexity where possible.

A team built for transition

You are not navigating the move alone. From implementation through go-live, you have a team focused on helping the transition stay clear, coordinated, and manageable.

You don't need perfect timing to start preparing

Many teams begin exploring alternatives before they are ready to make a change. That is often the smartest time to start, especially seeing how CFOs are facing a growing erosion of confidence in their company's cash flow.

69% of finance leaders
have seen an increase in late customer payments over the past 12-months. This volatility has become a persistent condition, forcing finance leaders to operate with less certainty and less room for error.

Source: 2026 Cash Flow Clarity Report

The sooner you act (to modernize your receivables to improve visibility, reduce friction, and anticipate risk earlier), the better positioned you'll be to stabilize cash inflows, strengthen forecast confidence, and navigate uncertainty with more control.

Early planning gives you the time you need to evaluate your options, understand what migration would require, and build internal alignment across Finance, IT, and Accounts Receivable without the pressure of an immediate deadline.

If your contract timing is not ideal, that shouldn't prevent you from taking useful next steps now. Early action will allow you to act decisively when necessary. You can begin mapping, clarifying internal responsibilities, and preparing to move when the timing is right.

What success can look like

Teams that make this move are typically looking for a combination of outcomes: less manual efforts across workflows, a better experience for customers and internal teams, faster progress toward automation, and a more scalable accounts receivable operation.

The right migration path should not just help you go-live. It should help you start building value quickly and give your team confidence that the move was worth making. Versapay's faster, more collaborative, and lower-risk path to accounts receivable transformation delivers measurable results in as little as three months.

What to expect in the first 90-days:

10 to 20%
Average improvement in days sales outstanding
Gulf Coast Panama Jack reduced their DSO 67%, lowering it from 30 to 10

70 to 85%
Customer adoption of electronic payments
97% of Laticrete's customers are using Versapay to access invoices and make payments

+50%
Reduction in paper checks
According to Forrester, Versapay reduced paper check payments for a composite customer by 70%

What to expect long-term*:

50%
Less time managing receivables

25%
Faster payments

30%
Fewer past-due invoices

60%
Reduction in DSO

** Based on aggregate customer outcomes*

> **"We've transformed our finance operations from a manual mess to a streamlined, strategic advantage;** saved the cost of an FTE; and reduced DSO significantly."
>
> **Danny Ng**, VP of Finance, Crystorama

A better way to move forward

You do not need to solve every implementation question before exploring a better path. What you do need is confidence that migration is realistic, that the burden on your team can be contained, and that you will have a partner who helps you through the process.

Next step

Speak with our experts. Share your current process, and together we'll map the path forward.