



## How ValueXPA Leveraged AI Automation to Streamline Invoicing and Contract Management for a US Software Business

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A U.S.-based software product company specializing in innovative automation tools across industries. The client faced significant challenges in managing invoicing and contract renewals. A backlog of pending invoices from the previous year and current month caused delays in revenue booking. This backlog extended the cash cycle, affected revenue recognition, and put pressure on financial operations. To make matters more complex, the client needed the entire process streamlined and cleared within a tight four-week timeline.

### The Problem We Solved

The client's invoicing and contract management process was largely manual and reactive. Invoicing backlogs prevented timely billing, causing missed revenue targets and negatively impacting cash flows. Contracts that were due for renewal often lacked proper renewal opportunity links, delaying invoicing further.

With over a year's worth of backlog and upcoming invoices to process, the Finance team struggled to meet deadlines. The client needed an AI-enabled solution that could intelligently clear the backlog, streamline contract management, and ensure timely invoicing going forward.

## What We Did

Despite gaining access to the client's systems later than expected—further compressing the timeline—ValueXPA implemented an AI-driven workflow orchestration model combining LLMs, Generative AI, Retrieval-Augmented Generation (RAG), and low-code AI tools.

### AI-Powered Backlog Clearance:

AI agents analyzed pending contracts and invoices, auto-classified them by age, priority, and revenue impact, and generated a sequenced execution plan. This eliminated manual tracking and allowed invoices from the previous year to be processed quickly and accurately.

### AI-Enhanced Contract Renewal Management:

Using predictive models, AI scanned all contracts 60 days before expiry to flag upcoming renewals. Missing renewal links were automatically identified and routed to IT and sales teams. Once corrected, AI systems immediately generated invoices the same day, ensuring no delays.

### Generative AI for Document Processing:

AI read unstructured contract data, extracted renewal terms, customer details, and billing parameters, and converted them into structured invoice-ready data. This reduced dependency on manual document reviews. Using RAG we created the semantic database using historical contract documents to improve the accuracy of the output.

In all these steps, AI agents were orchestrated with a human-in-the-loop mechanism for exception handling and verification, ensuring accuracy while maintaining speed.



#### Efficiency & Speed

Speeds up processes by eliminating repetitive manual work.



#### Accuracy & Consistency

Reduces errors and ensures consistent, reliable outputs.



#### Scalability & Flexibility

Adapts easily to growing business needs without extra resources

## How We Created an Impact

ValueXPA's AI automations enabled the client to complete invoicing and contract backlog clearance ahead of the four-week deadline. By automating contract review, renewal tracking, backlog clearance, and invoice generation, the process that once caused severe delays became predictable and efficient.

- The invoicing backlog was cleared in record time, enabling the client to surpass annual revenue booking targets.
- Contract renewal issues were addressed systematically, reducing revenue leakage and ensuring on-time billing.
- Forecasting capabilities improved visibility into future revenue, giving Finance leaders greater control.
- The client was able to expand ValueXPA's role into other areas of Finance, building on the success of this automation initiative.

Ultimately, AI automation transformed invoicing and contract management from a reactive, backlog-driven process into a streamlined, scalable, and intelligent workflow, empowering the client to focus on growth and core business objectives.

For more information on business partnering  
please connect with us!

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