



## How ValueXPA Leveraged AI Automation to Streamline Invoice Management for a US B2B Revenue-Based Financing Business

---

A US-based B2B Revenue-based Financing business collaborating with multiple vendors faced challenges in managing accounts payable. Vendor bills were sent to a dedicated email inbox, creating a manual and time-consuming process for capturing invoice details and scheduling payments. The lack of a centralized system resulted in poor documentation practices, delayed payments, and growing dissatisfaction among vendors. The client sought an AI-driven solution to automate invoice management, reduce backlog, and improve vendor relationships.

### The Problem We Solved

The client's invoice and payment management process was largely manual, causing significant operational inefficiencies. Vendor bills required manual review and data extraction from emails, and payments were frequently delayed, leading to a growing backlog and vendor dissatisfaction.

The lack of centralized tracking resulted in duplicate payments and errors, while management had no easy way to access consolidated vendor information for reference. The client needed an AI-powered solution to streamline invoice capture, validation, payment scheduling, and reporting while ensuring accuracy, transparency, and timely approvals.

## What We Did

ValueXPA implemented AI automation using cloud-based tools to enhance accounts payable and invoice management processes, combining intelligent data extraction, workflow orchestration, and human-in-the-loop verification.

### AI-Powered Invoice Capture & Validation:

AI agents automatically extracted invoice details from vendor emails, validated them against purchase orders, and flagged inconsistencies. This eliminated manual data entry and reduced errors.

### Automated Backlog Clearance:

AI reviewed pending invoices, cross-referenced ACH payments with vendor statements, and resolved the existing backlog. Priority vendors were identified and processed first to ensure critical payments were cleared promptly.

### Recurring Payment Automation:

For frequently engaged vendors, AI set up recurring payment schedules, reducing manual effort and ensuring timely settlements.

### Centralized Vendor Master Management:

AI consolidated vendor data into a structured master file, providing quick access to contact details, payment history, and invoice status. This enabled faster processing, enhanced vendor collaboration, and improved record-keeping.

### AI-Enhanced Workflow & Reporting:

AI orchestrated the entire AP workflow, tracking approvals, generating alerts, and producing real-time dashboards to monitor invoice status, payment cycles, and compliance. Human-in-the-loop verification was used for exceptions to ensure accuracy. Using RAG we created the semantic database using historical contract documents to improve the accuracy of the output.



#### 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

Within three months, ValueXPA's AI automation dramatically reduced the invoice backlog by 90%, enabling faster processing and clearing of outstanding payments. The automated validation and reconciliation processes completely eliminated the risk of duplicate payments, while faster invoice approvals ensured more timely settlements, improving vendor relationships. Centralizing vendor data and leveraging AI-driven workflows also ensured that 100% of invoices were accurately documented, enhancing transparency and audit readiness. Overall, the automation transformed the accounts payable function from a manual, error-prone process into a streamlined, efficient, and reliable operation, saving significant time and allowing the finance team to focus on strategic initiatives.

For more information on business partnering  
please connect with us!

Write to us at [info@valuexpa.com](mailto:info@valuexpa.com)

AI & Cloud Analytics | Extended Planning & Analysis (XP&A) | Finance  
Managed Services

[www.valuexpa.com](http://www.valuexpa.com)

 Calendly



[www.calendly.com/valuexpa](http://www.calendly.com/valuexpa)