



AI Directions: How Charted customers are using natural language AI directions to handle their invoice edge cases

ORACLE
NetSuite
SuiteCloud Developer
Network Partner



It can be hard to know where to start with **Invoice AI Directions**: Real-life use cases—using natural language to make changes to how your invoice automation workflow normally functions. Use the below example prompts as a starting point from real Charted customers who are using AI Directions to save time on manual invoice edits.

01

Separate out segment IDs and memo lines from the rest of your invoice data

Suitable for:

Higher education, multi-subsiary, non-profits

The problem:

Dealing with complex invoices is nothing new, and NetSuite can handle multiple segment IDs without a problem. Separating out that information when one invoice has dozens of lines with various IDs and memos is the tricky part. Use AI Directions to ensure codes are separated out correctly from other invoice information like descriptions, funds, and purposes.

Example:

- ◆ Extraction field: Segment Code
- ◆ AI Direction: 9 Digit code found under the heading "Customer Reference"
- ◆ Extraction field: Memo
- ◆ AI Direction: Concatenate Description, Fund, and Purpose columns.
- ◆ (Example: Paper supplies – Liberal arts – unrestricted funds)

The takeaway:

This prompt ensures every single segment code is automatically pulled into the correct column, and the memo information is kept together in the memo column. It also separates out every line into multiple items in NetSuite, based on the segment code. This works in addition to Invoice AI extrapolating standard info from the invoice such as invoice number, date, address, etc.



02

For one tricky vendor, solve ongoing issues with a single direction

Suitable for:

Anyone

The problem:

Do you have that one vendor whose invoices always cause a problem? Maybe it's a logistics company with PO numbers that always cross-reference incorrectly, or a particular vendor that will always have the same memo information, save time with a vendor-specific AI direction.

Use specific keywords to specify your tricky vendor and use AI Directions to determine what to do for that specific vendor invoice.

Example:

- ◆ Keyword: County EMS
- ◆ Extraction field: Memo
- ◆ AI Direction: Concatenate: EMS Services, then add the "date of event", then add "event".

Example:

- ◆ Keyword: <vendor name>
- ◆ Extraction field: PO Number
- ◆ AI Direction: Do not grab the PO# listed on the invoice.

The takeaway:

Instead of making the same manual adjustments every time you receive an invoice from that one specific vendor, create a vendor-specific rule to ensure the correct information is pulled into the correct column every single time.



03

Concatenate this

Suitable for:

Anyone

The problem:

Need to combine data into one field in order to make sense of various bills? A common issue for utility invoices, set up a concatenate direction for any number of AI Directions, and automatically ensure your invoice data is accurate no matter what format it's in.

Example:

- ◆ Extraction field: Invoice Number
- ◆ AI Direction: Concatenate the Meter Reading Date and the Account Number found in the upper right hand of the invoice.

Example:

- ◆ Field: Invoice Number
- ◆ AI Direction: Concatenate the Bill Date and Account Number found in the bottom right corner of the invoice.

Example:

- ◆ Field: Invoice Number
- ◆ AI Direction: Concatenate the end service period date (MM/DD/YY) and the Account Number found in the upper left hand of the invoice.

The takeaway:

When you need to combine pieces of information across an invoice, the concatenate direction is easy to set up. When it only applies to specific vendors, you can create vendor-specific concatenate directions with vendors listed as keywords.

04

Pre-emptively fix mistakes

Suitable for:

Anyone

The problem:

Getting dates in the wrong year or invoices with the wrong code? Get ahead of fixing minor errors with an AI Direction designed to find and fix on its own.

Example:

- ◆ Field: Invoice Date
- ◆ AI Direction: The invoice date must always be in the 2000s – if the year begins in 19 (e.g. 1926), replace with 20 (e.g. 2026). If the document shows a 2-digit year (e.g. 26) assume 2026.

The takeaway:

Finding and fixing minor errors still takes up time out of your day. Let Invoice AI save you the hassle.

05

Personnel directives

Suitable for:

Working with large vendors who have multiple locations and offices, intercompany transactions

The problem:

Large vendors or intercompany transactions can result in difficult matching between departments, locations, and other specific data. A simple AI Direction can clear up who operates where with the following prompt.

The prompt:

- ◆ Field: Account
- ◆ Direction: Capture "requested by" found above the invoice table.
- ◆ Field: Department
- ◆ Direction: Capture "requested by" found above the invoice table.
- ◆ Field: Location
- ◆ Direction: Capture "requested by" found above the invoice table.

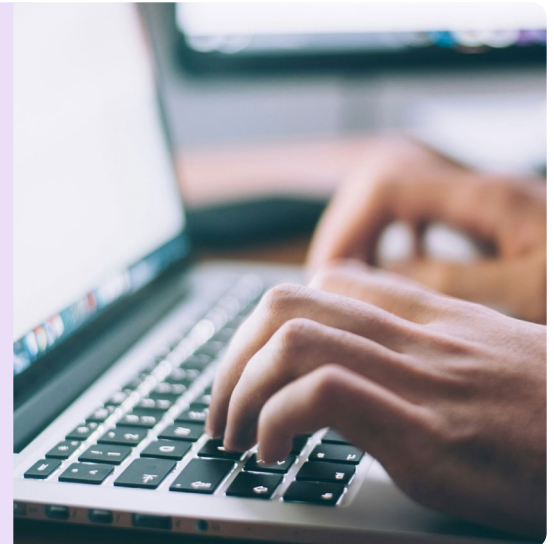
The takeaway:

Use the field to specify which pieces of information (account number, department, location) are associated with a specific datapoint on the invoice, in this situation the requested by individual. For multiple segments that all rely on the same data point, you can reuse the same AI Direction.

This ensures invoices are always associated with the right account number, department, and location, based solely off of one person's name. This prompt set-up can be repeated for as many people you need to keep track of. Updates to personnel info can also be easily updated in one place.

Charted tips and tricks for Invoice AI Directions:

- ◆ The shorter the direction, the easier it is for the AI to follow.
- ◆ Prompts don't have to be in English! Invoice AI works in a number of different languages, and the same goes for AI Directions.
- ◆ For vendor-specific AI Directions, always specify your vendor name in the keyword so AI Directions knows what to look for.
- ◆ If you want your information to be returned in a specific written format (like dashes between different information), use an example to write out exactly how you want your data laid out.





Interested in learning more about Charted Invoice AI and using the AI Directions feature?

Contact us today.

About Charted

Charted clears the path for finance teams with AP Automation solutions built directly into your NetSuite environment, providing real-time clarity on every invoice, approval, and payment. Eliminate manual data entry with AI-powered capabilities and automation designed to accelerate your month-end close. Enable the most complex approvals and global, multi-entity workflows. Charted was born from years of hands-on implementation and consulting expertise, bringing you a one-stop-shop for everything NetSuite. To find out more, please visit www.charted.com.

©2026 Charted (051326)

charted.[™]

101 Arch St 8th floor
Boston MA, USA
+1 800-779-6285
charted.com

ORACLE
NetSuite
SuiteCloud Developer
Network Partner