



# How to achieve AI success with invoice automation inside NetSuite

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## Key takeaways



### **AI accuracy is table stakes, not a differentiator.**

Most vendors lead with accuracy claims, but field-level OCR accuracy should be the baseline expectation of any AP solution. Real ROI is found in what happens after extraction: whether the data lands on the right record, populates custom fields correctly, and gets coded consistently over time.



### **Native ERP architecture matters more than most buyers realize.**

Tools that write to a separate record type (rather than directly to the Vendor Bill) introduce conversion steps where custom fields get dropped and audit trails fragment. The case here is that living inside NetSuite, rather than syncing to it, is what makes AI outputs trustworthy at scale.



### **Natural language instructions are the real edge-case differentiator.**

The gap between “mostly automated” and “touchless” usually comes down to a handful of recurring exceptions that previously required IT tickets or SuiteFlow scripts. Plain-language directions that finance teams can write and maintain themselves change that calculus significantly.



### **Touchless processing is a destination, not a feature toggle.**

Five distinct capabilities need to work in concert: centralized intake, high-accuracy capture, real-time three-way match, edge-case handling, and approval automation. Remove any one of them and the touchless rate collapses. The 25%+ figure cited is a useful benchmark for what a well-architected stack can realistically achieve.



# 01

## Introduction

Most finance teams have heard the AI pitch for improving invoice processing by now. Upload a PDF, the software reads it, a bill appears in NetSuite, and your AP team goes home early. The reality on the ground looks different. Optical character recognition is still not fully accurate, so your OCR misreads keep showing up in the same fields. The same five vendors get re-coded every month. Foreign-language invoices stall. Custom fields don't populate. The AI efficiencies never materialize despite the promises, and AP managers quietly build spreadsheets in the background to track what the tool missed.

If that sounds familiar, the issue isn't AI—it's how the AI was built into the AP workflow. For NetSuite users, the complexity of NetSuite requires an AI that is built on a deep understanding of the ERP. Here we distill what real AI success looks like for invoice processing inside NetSuite, the importance of tracking efficiency gains beyond accuracy, how natural language instructions change the math on edge cases, and what it actually takes to make touchless invoice processing more than a slide in a vendor deck.

To learn more about the basics of AI invoice processing and what to look for when evaluating AI invoice processing software, read our [blog here](#).



# 02

## What real AI invoice processing looks like in NetSuite

For AP teams that have long relied on rigid automation tools based on extremely defined extractions rules, it can be hard to envision what effective AI looks like within your accounts payable processes.

The system has always been set up the same way: OCR-based data extraction, hoping that templates are followed and line items coded correctly, then manual reviews, often followed by manual fixes.

A truly smart AI system expands on all of this to offer not just a higher level of accuracy or smarter templates, but instead is able to learn over time and adapt to how your organization does business. Your system should now be able to not just extract your data, but know where it should go, extract patterns and be able to apply them to invoices going forward, and automatically process your invoices and bills to ensure it follows the previous standards.

In this, the accuracy claims of many AI tools are a false flag—AI accuracy should be a given when it comes to extracting invoice data. It's what happens after the data is extracted is what matters.

# 03

## The barrier to AI outputs you can trust

While accurate data ingestion should be table stakes, it is also the most crucial aspect in ensuring effective AI use to process invoices in NetSuite (or any other automated accounts payable function in NetSuite). **The data powering your AI must be 100% clean and reliable.** Every other aspect of AI use—how to measure efficiency gains and success, improved workflows, NetSuite customizations, improved audit trails, chatbot functionality—operates downstream of AI outputs that must be based on data your team can trust.

A capture engine that only hits 70–80% field-level accuracy and dumps results into a staging record isn't automation—it's a head start on manual data entry. Real AI invoice processing has to clear these three bars:

**It has to be accurate where it counts.** Header-level accuracy is the easy part. Vendor name, invoice number, total. The harder problem is line-item extraction: quantities, unit prices, descriptions, account numbers, service periods. That's where most tools fall apart and where AP teams lose hours every week re-keying data. [Charted Invoice AI](#) hits 95%+ field-level OCR accuracy, including line items, and it learns each vendor's coding patterns from your own historical NetSuite data. The result is accuracy that climbs over time instead of plateauing at go-live.

**The data has to land on the native Vendor Bill record.** Many tools—including NetSuite's own Bill Capture—create a separate record type that then has to be converted into a Vendor Bill. That conversion step is where custom fields get dropped, line-level data gets flattened, and audit trails get fragmented. Charted Invoice AI writes directly to the Vendor Bill record, so the custom fields, saved searches, workflows, and approval chains you've already built carry over without reconfiguration.

**It has to be able to handle the complexities your business faces every day.** Multi-subsidiary, multi-currency, multi-country. Non-Latin character sets, including Japanese, Arabic, and Mandarin. Custom fields at line level. If your AI tool can only handle the easy invoices, it's not solving the problem.



## NetSuite houses your data foundation

The second most important factor in ensuring your data can be trusted within an AI-enabled framework to produce quality outputs is where your data lives. When organizations invest in an enterprise resource planning platform (ERP) like NetSuite, they are investing in a foundation for their business' data. The quality of that foundation has never been more important, as teams are increasingly relying on AI to produce work they need to trust.

When AP solutions operate externally outside of NetSuite, relying on asynchronous connectors that stall your data sync, historically has meant slower processes. Now, with every piece of data critical to running any AI-enabled solution within NetSuite, keeping all your software embedded within NetSuite is now crucial to maintain the quality of work outputs.

If AI is only as good as the data powering it, that data needs to live where your solutions do—on the native NetSuite Vendor Bill. Third-party integrations are a tax on not just your organization's time, but their efficiency, and now the quality of the work you're getting from the solutions you pay for.

# 04

## Natural language AI directions in action

Even with strong baseline accuracy, every AP team has a list of invoice scenarios that automation can't handle. The German vendor whose invoices need to be translated before extraction. The utility bill where the first date on the line is the service start and the last date is the service end. The PO-backed invoice where a memo reference determines which project gets coded.

[AP Automation edge cases are harder to solve than they look; read our blog post here for more on what AI Directions actually does and how to handle your complex edge cases.](#)

Historically, those scenarios meant one of three things: a SuiteFlow script, an IT ticket, or a manual workaround that quietly recurred every month. AI Directions, using natural language, changes that equation. Instead, finance can write rules out directly in the program (in whatever language they work in), creating specific scenarios based on vendors, departments, account numbers, or providing context for recurring edge cases that are constantly getting flagged; the AI tool then executes it during processing, removing manual headaches from the daily workflow.

A few examples of what that looks like in practice:

- ◆ **Translation:** "Translate the invoice into English before extracting." Applied as a whole-invoice direction, every line and field comes into NetSuite in English regardless of source language.
- ◆ **Date parsing:** "On each line, pull the first date as Start Date and the last date as End Date." Useful for subscriptions, service contracts, and any vendor whose invoices carry a billing period at the line level.
- ◆ **Custom field population:** "Find the project code under the Project heading and populate my custom segment."

Directions can be scoped narrowly—triggered only when a specific vendor name, account number, or tax ID appears on the document—or broadly across every invoice. There's no code, no IT ticket, no script to maintain. The people who understand the rule write the rule.

This is the practical difference between an AI solution that needs to be configured versus AI designed to work for your AP team first and foremost. Rigid rules force you to fit your business into pre-built logic. AI Directions lets you tell the system how your business actually works.

For more AI directions examples, read our popular blog post [here](#).

Want examples of natural language directions taken directly from real-life use cases? Download our guide [here](#).

### Guide

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

See Real-Life Examples [▶](#)



Missed the Charted webinar on AI Directions? Download the recording [here](#) or read the Q&A for tips and tricks [here](#).

Invoice AI Master Class Series for NetSuite

### AI Directions in action: Real invoice processing scenarios in NetSuite, real results

Watch Now [▶](#)

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# 05

## Setting your AP team up for touchless invoice processing

What is touchless invoice processing? Touchless processing happens when bills are created automatically by Charted Invoice AI and submitted for approval with zero manual work from anyone on your AP team. This is the destination in AI efficiency, not the starting point. Getting there requires a stack of capabilities working together. Pulling any one of them out breaks the entire process.

- 1. Centralized native intake.** Every invoice has to land in one place, using data extraction you trust. The central AP Inbox replaces scattered intake (personal email, vendor portals, physical mail) with a single NetSuite-native queue that can be filtered per subsidiary or team member. If invoices are still arriving in five different external inboxes, no amount of AI on the back end will produce a touchless workflow.
- 2. High-accuracy capture and coding.** Touchless invoice processing only works when the team is confident in the accuracy of the data the AI is ingesting, trusting it to work without review. That requires field-level accuracy above 95%, vendor-based learning, and clean handling of custom fields and line items. Anything less and you're auto-creating bills that need to be fixed downstream with further reviews, which is worse than not auto-creating them at all.
- 3. Real-time three-way match.** For PO-backed invoices, touchless invoice processing requires real-time, line-level matching against purchase orders and receipts that already live in NetSuite. When invoice quantities and prices match the PO and receipt within tolerance, the bill auto-creates and flows directly into approvals. When they don't, the invoice stays in the inbox with clear discrepancy details—not in a separate system requiring reconciliation. Note that touchless invoice processing on PO-backed bills requires an exact match between PO and bill lines; tax or shipping added on the bill that wasn't on the PO will route the invoice back for manual review.
- 4. AI Directions for the edges.** No matter how good the baseline AI is, every AP team has edge cases. AI Directions handles the ones a rules engine can't express, like translations or custom field population, so those invoices don't fall out of the touchless flow into manual handling.



- 5. Approval Automation that runs without a license tax.** Once a bill is created, it has to move through approval without bottlenecks. Email-based approvals let approvers act without a NetSuite license, and complex multi-level routing handles conditions across amount, entity, department, vendor, or any NetSuite field, all without IT involvement.

When those five blocks are in place and architected on the same Vendor Bill record, touchless stops being a marketing claim and starts being a measurable share of your AP volume. Charted customers automate 25%+ of invoice volume through Touchless Invoice Processing—utilities, subscriptions, recurring services, and PO-backed bills that match cleanly.

# 06

## Where to start when evaluating AI tools for invoice processing

If you're evaluating AI invoice processing for NetSuite, the important questions to ask aren't about accuracy claims or ease of setup (based on a third-party integration). They're about architecture and edge cases:

- ◆ Does the tool write directly to the Vendor Bill record, or does it create a separate record type that has to be converted?
- ◆ Is the AI adaptive or rule-based?
- ◆ What's the line-level OCR accuracy—not just the header?
- ◆ When an edge case appears that the AI can't handle out of the box, what's the path to fixing it? Plain-language instruction, configuration, or developer ticket?
- ◆ How does three-way match work on partial receipts and line-level variances?
- ◆ What's the touchless invoice processing rate?
- ◆ What happens to custom fields, saved searches, and approval workflows you've already built?
- ◆ Does it live inside your ERP or outside it?

The answers separate an AI tool that compounds in value from AI tools that plateau directly after implementation.

Ready to see what touchless invoice processing looks like on your NetSuite instance? [Request a demo](#) and we'll walk through your specific circumstance and how Invoice AI can solve for everything your team is facing—manual work, edge cases, PO-matching, and the invoices that break every other tool—together.



## 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](http://www.charted.com).

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