# Levelpath Invoice Automation

## What Is Levelpath Invoice Automation?

Levelpath's Invoice Automation is an AI-native capability that connects sourcing, contracting, supplier management, and invoicing inside the Levelpath Source to Contract platform. It provides procurement and finance teams with one shared system for tracking supplier actions, financial obligations, and the accuracy of spend.

In Levelpath, every invoice is connected to the Supplier System of Record. This creates a complete, auditable chain that links supplier entities, commercial terms, contract commitments, and payment details. The result is higher financial accuracy, stronger compliance, and better coordination across procurement, FP&A, accounting, and treasury.

## Why Levelpath Invoice Automation Matters

Invoice Automation solves a central problem: invoices rarely include the sourcing context, contract details, or supplier structure required for accurate financial planning. Without that context, teams struggle to validate spend, confirm savings, or ensure alignment between operations and financial reporting.

By managing invoices within the Source to Contract ecosystem, Levelpath gives organizations a unified view of supplier activity. This improves forecast accuracy, increases reliability in financial statements, and creates measurable connections between procurement decisions and financial outcomes.

## How Levelpath Invoice Automation Works

Levelpath Invoice Automation works by connecting every invoice to supplier entities, contract and PO data, and sourcing history through the Supplier System of Record. This ensures that each invoice carries the full commercial and operational context needed for accurate financial and procurement decision-making.

To support this, Levelpath uses three core mechanisms that ensure financial accuracy and traceability at scale:

1. **Unified Data Model**
   When an invoice enters Levelpath, the system validates it against the Supplier System of Record, which includes the supplier's brand, commercial entity, and payable entity. This ensures that financial data aligns with the correct supplier relationships, contract terms, and payment requirements. Because Levelpath stores sourcing events, pricing details, and contract metadata in one unified system, every invoice automatically inherits its associated business context.

2. **AI Interpretation and Exception Detection**

   Levelpath uses natural language models and configurable Task Agents to interpret invoice content. The AI evaluates line items, pricing, tax information, and supplier identifiers, and compares that data to sourcing records, contracts, and known payment structures. Exceptions such as incorrect pricing, unmatched supplier entities, or missing terms are detected early, reducing downstream financial errors and manual reconciliation.

3. **End-to-End Workflow and Traceability**

   Each invoice is tracked through a complete workflow from submission to approval to payment readiness. Users can see every action in an Activity Log and understand exactly how decisions align with contract commitments, approval policies, and supplier performance. This traceability offers finance and procurement teams a transparent view across the entire lifecycle, improving audit readiness and reducing risk.

## Core Functional Areas of Levelpath Invoice Automation

Levelpath Invoice Automation includes several functional areas that streamline collaboration across finance, procurement, accounting, and suppliers. Each area uses Levelpath's unified data model to ensure accuracy and eliminate fragmentation.

**Centralized Invoice List and Approval Flow**: Teams view, filter, and approve all invoices in one location. Because the list is connected to sourcing, contract, and PO data, approvers understand the context behind each invoice without switching tools. Approval routing follows policy rules and is fully traceable.

**Hub Integration for Cross-Functional Collaboration**: Approvals and discussions occur inside the Levelpath Hub, which connects procurement, finance, and business stakeholders. The Levelpath Hub embeds invoice context, supplier records, and contract terms directly into each conversation, reducing delays and improving decision quality.

**Supplier Portal Upload**: Suppliers can upload invoices securely through the portal. When invoices arrive, Levelpath automatically links them to supplier records and checks them against contract terms. This eliminates manual PDF handling and reduces the chance of inaccurate or incomplete invoice submissions.

**AI Assistant Support**: Task Agents analyze line items, extract relevant contract information, check for discrepancies, and highlight exceptions that require review. AI-generated summaries explain issues such as quantity mismatches, incorrect pricing, or missing support documents, enabling faster and more accurate approvals.

**Automated Matching**: Invoices are matched to supplier entities, contract types, terms, and sourcing results. This ensures that financial data aligns with operational commitments and reduces risk of spend leakage or unauthorized purchasing.

**Customizable Filters and Views**: Teams can organize invoices by supplier, category, spend type, contract type, approval stage, or business entity. These structured views simplify audits, strengthen financial reporting, and help track supplier performance through invoice patterns.

## Value and Savings Tracking

Levelpath Invoice Automation directly connects savings projections to realized financial outcomes. These savings can originate from contract terms, sourcing events, supplier negotiations, or adjustments to goods and service level agreements. By linking invoice data to these savings metrics, teams can validate savings realizations and improve transparency in reporting financial impact.

This connection is supported by four core capabilities that strengthen both financial reporting and procurement accountability:

1.  **Direct Link Between Invoices and Sourcing Outcomes**
    Because sourcing events, bid comparisons, and negotiation results live in the same system, Levelpath can automatically compare invoice pricing and contract terms against negotiated rates. This lets teams see whether negotiated savings are being captured or eroded.

2.  **Contract Term Validation**
    Invoices are checked against contract details such as rate cards, service levels, rebate structures, and volume tiers. Levelpath identifies whether invoices reflect agreed pricing or if discrepancies require follow-up with suppliers.

3.  **Real-Time Realization Tracking**
    Savings dashboards show where value has been realized, where it is still pending, and where leakage may be occurring. Procurement and finance teams can jointly quantify the financial impact of sourcing strategies across categories, suppliers, and business units.

4.  **Complete Financial Transparency**
    Because invoices sit within the Supplier System of Record, leaders can trace financial impact back to supplier activities, commercial terms, and business unit spend. This supports more accurate budgeting, improves forecast reliability, and gives executives a clearer view of supplier performance.

**Benefits of Levelpath Invoice Automation**

Levelpath Invoice Automation improves financial accuracy and operational performance across the organization. For CFOs, the benefit is greater control over spend, more reliable forecasts, and stronger audit readiness because invoices carry complete sourcing and contract context. For CPOs, the benefit is increased financial credibility, clearer visibility into supplier performance, and a direct connection between procurement initiatives and measurable business outcomes. Both functions benefit from reduced manual work, stronger data integrity, and a unified platform that eliminates fragmentation across systems. By connecting every invoice to the Supplier System of Record, organizations gain the transparency, reliability, and control needed to manage spend with confidence.

# Learn more about Invoice Automation with Levelpath.

Request a demo. ❯

Match Found!

Supplier
Microsoft Corp

Matched Record
PO-3251

When comparing the invoice to the PO, the following errors were discovered.

**Violations**
There are 3 discrepancies found between this invoice and the PO that was matched.

⊗ Payment Address ⌄
⊗ Payment Terms ⌄
⊗ Budget ⌄