

Oracle Fusion Cloud Financials

Detailed Adoption Guidance: Payables Agent



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1 About this Guide

This document explains how to adopt, configure, validate, and operate Payables Agent within Oracle Fusion Cloud ERP.

Purpose

Payables Agent helps organizations move toward touchless Accounts Payable processing through AI-driven invoice ingestion, document recognition, adaptive learning, centralized exception management, invoice completion, compliance controls, and invoice processing automation.

Objectives

After completing the activities described in this document, you can:

- Understand the capabilities and value of Payables Agent.
- Prepare organizational data for Payables Agent implementation.
- Configure the setup of Payables Agent and related modules that the agent can access.
- Configure invoice completion policies and anomaly controls.
- Review optional configurations that enhance Payables Agent capabilities.
- Manage user roles and configure security access.
- Validate invoice processing through testing.
- Plan and execute the rollout.
- Resolve common adoption and configuration issues.

Intended Audience

This document is intended for:

- Financials Implementation Consultants
- Payables Administrators
- Security Administrators
- Shared Services Organizations
- Accounts Payable Managers and Supervisors
- Business Process Owners
- ERP project teams responsible for deployment and adoption

2 Overview of Payables Agent

What is Payables Agent?

Payables Agent is an AI-driven Accounts Payable assistant that helps organizations automate invoice processing and move toward touchless payables operations.

It supports invoice capture, data extraction, monitoring, training, and exception handling in a unified experience. This helps reduce manual entry, fragmented reviews, supplier-specific setup, and challenges caused by changing supplier invoice formats.

The agent interprets invoice layouts, content patterns, and field relationships to map invoice information to Payables attributes. It learns from user corrections and processing outcomes, improving recognition accuracy and straight-through processing over time.

Payables Agent also supports Compliance & Control capabilities for completing invoice attributes and identifying potential anomalies during invoice processing. Invoice Completion derives internal attributes that aren't provided on supplier invoices, while anomaly controls invoices that deviate from defined organizational criteria. These capabilities are configured using natural-language instructions.

Related Topics

Implementation Scope

Payables Agent implementation covers invoice ingestion, document processing, monitoring, training, exception management, adaptive learning, reporting, agent-assisted experiences, invoice completion, and anomaly detection.

Implementation scope covers the following functional areas:

Functional Area	What the Implementation Covers
Invoice Ingestion	Receive invoices through email-based submission, electronic invoice integrations, partner e-Invoice integrations, Supplier Portal transactions, mass invoice imports, internal application-generated invoices, and manual invoice creation. Incoming documents are classified and organized into processing streams.
Document Processing	Interpret invoice layouts, content patterns, and field relationships to identify invoice information and map it to Payables invoice attributes.
Invoice Document Streams	Monitor inbound invoice documents, processing status, ingestion activity, exceptions, search and filter results, and drill into processing details.
Invoice Document Training	Upload sample invoices, review extracted attributes, correct fields requiring review, and train new supplier invoice layouts. Corrections are retained for future invoices with similar layouts.
Invoice List	Review invoice status, manage rejected invoices, investigate policy violations, correct invoice data, and monitor exception resolution.

Functional Area	What the Implementation Covers
Adaptive Learning	Store user corrections against invoice fingerprints and apply learned patterns to future invoices with similar layouts. Learning supports header-level and line-level attributes and can be shared between environments.
Reporting and Monitoring	Use the Invoice Documents Recognition Tracking Report and Invoice Documents Recognition Rate Report to review processing progress, recognition accuracy, supplier performance, and training opportunities.
Payables Agent Home	Provide a unified starting point for natural-language inquiries, suggested prompts, navigation to Payables work areas, and prioritized Top Insights.
Insights	Present role-aware invoice-processing signals generated by monitoring prompts and support review, dismissal, reopening, and navigation to the related invoice or configuration context.
Enhanced Learning	Review and correct the generated mappings for unstructured PDF and image invoices. Support annotation-based training for descriptive flexfields and regional or global flexfields and fingerprint-based reuse of learning.
Invoice Completion	Define policies that derive supported accounting, tax, project, asset, payment, localization, and additional-information attributes when those values aren't already present on imported invoices.
Anomaly Detection	Configure supported controls to identify invoices with unexpected currency, remittance-bank-account location, unusually high amounts, potentially fraudulent attribute combinations, or duplicate invoice numbers.

Business Processes Impacted and Expected Outcomes

Payables Agent capabilities address common invoice-processing challenges and improve automation, visibility, recognition accuracy, exception resolution, policy compliance, and operational scalability.

These business processes are impacted by the Payables Agent:

Business Process or Challenge	Payables Agent Capability	Expected Outcome
Manual invoice entry and slow invoice cycle times	Unified Invoice Ingestion and automated document processing	Reduces manual invoice handling and accelerates invoice readiness for validation, approval, and payment.
Supplier invoice format variability	Layout-aware document processing and Invoice Document Training	Improves recognition accuracy across changing supplier formats and layouts.
Supplier layout onboarding	Invoice Document Training and Adaptive Learning	Supports onboarding of new suppliers and invoice layouts without extensive supplier-specific configuration.
High exception rates and fragmented reviews	Invoice List	Reduces context switching and accelerates exception review, correction, and resolution.
Limited visibility into ingestion and processing	Invoice Document Streams, Invoice List, and reporting	Improves visibility into processing activity, exceptions, operational health, and performance.

Business Process or Challenge	Payables Agent Capability	Expected Outcome
Recognition accuracy improvement	Adaptive Learning	Reuses corrections for future invoices and increases straight-through processing over time.
Difficulty scaling invoice operations	Unified ingestion, training, adaptive learning, and reporting	Helps invoice operations scale more efficiently as invoice volumes, suppliers, and layouts increase.
Operational performance monitoring	Recognition tracking and recognition rate reporting	Identifies supplier trends, recognition gaps, and additional training opportunities.
Missing internal invoice attributes	Invoice Completion	Reduces manual entry by deriving supported invoice attributes during import when the target value is blank.
Potential fraud, duplicate invoices, and unusual invoice activity	Anomaly Detection	Marks invoices that meet configured anomaly criteria for review before processing continues.
Users don't know where to begin a Payables inquiry	Payables Agent Home and suggested prompts	Provides a consistent entry point and reduces navigation and prompt-discovery effort.
Important invoice-processing issues are found through manual review	Insights and monitoring prompts	Surfaces prioritized anomalies, processing exceptions, rejections, and backlog risks earlier.
Exception resolution requires navigation between multiple pages	Invoice List and data canvas NLP-based chat experience	Keeps inquiry context, invoice results, and supported actions in one workspace.

Availability and Adoption Path

This topic describes adoption paths for existing Intelligent Document Recognition customers and new Payables Agent customers.

Customer Type	Adoption Path
Existing IDR Customers	Existing Intelligent Document Recognition customers can adopt Payables Agent without significant disruption. Payables Agent uses Document IO as the underlying invoice recognition engine while preserving existing invoice submission processes, existing mailboxes, and previously established adaptive learning. Existing adaptive learning remains available, and the transition to the new processing framework is automatic.
New Customers	New customers must activate Document Recognition and Processing Options before Payables Agent can process invoices. Activation enables supplier synchronization, purchase order synchronization, and invoice ingestion capabilities.

Payables Agent changes how invoices are ingested, recognized, monitored, corrected, and improved, but it doesn't replace the standard Payables invoice lifecycle.

3 Before You Start

Complete Required Application Setup

Ensure all foundational Oracle Financials and Procurement setup activities are complete before enabling Payables Agent.

At a minimum, verify:

- Business Units are configured.
- Suppliers and supplier sites are established.
- Procurement processes are operational.
- Purchase Orders are being generated using approved formats.
- Payables processing is functioning correctly.

Payables Agent relies on existing application setup information when identifying suppliers, matching purchase orders, deriving Business Units, creating invoices, and applying invoice completion policies.

Prepare Supplier Master Data

Supplier master data quality has a direct impact on recognition accuracy.

Payables Agent uses supplier information during supplier prediction and invoice recognition activities. Supplier names and addresses maintained in Oracle Cloud ERP should match the information displayed on supplier invoices as closely as possible.

When reviewing supplier data:

- Verify supplier names match invoice names.
- Verify supplier site addresses match invoice addresses.
- Avoid maintaining multiple supplier sites with identical addresses where possible.
- Review internal and intercompany suppliers that may need special handling.

Poor supplier master data quality is one of the most common causes of supplier recognition issues.

Review Purchase Order Number Formats

Payables Agent uses purchase order numbers as a key recognition and matching mechanism.

Organizations should review existing purchase order numbering standards and ensure formats are:

- Consistent
- Distinctive

- Easy to identify on supplier invoices

Alphanumeric purchase order formats generally provide better recognition results than purely numeric formats because they are less likely to be confused with invoice numbers, dates, or monetary values.

Collect Representative Invoice Samples

Invoice testing and training activities require representative invoice documents.

Before implementation, collect invoices from the organization's most frequently used suppliers.

Recommended practice:

- Collect invoices from at least the top 10–20 suppliers.
- Include multiple invoice layouts where available.
- Include regular recurring invoices.
- Include invoices from different regions and Business Units where applicable.
- Include invoice scenarios needed to validate invoice completion policies and anomaly controls.

These invoices will be used during testing, training, policy validation, and control validation.

Prepare Invoice Submission Strategy

Determine how suppliers will submit invoices for processing.

Oracle assigns a unique Payables Agent email address that serves as the ingestion endpoint.

Rather than exposing the Oracle-generated address directly to suppliers, Oracle recommends creating one or more corporate invoice mailboxes and configuring automatic forwarding to the Payables Agent endpoint.

Examples:

- invoices@samplecompany.com
- apinvoices@samplecompany.com
- ap-emea@samplecompany.com

This approach provides:

- Simpler supplier communication
- Better operational monitoring
- Enhanced spam protection
- Easier business unit segmentation

Prepare Scanning and File Submission Standards

Before testing Payables Agent, define standards for scanned invoices and invoice attachments.

Consistent file preparation improves recognition accuracy, reduces invalid file errors, and helps prevent supporting documents or multiple invoices from being processed incorrectly.

Area	Standard
Scanned invoice format	Use PDF or TIFF for scanned paper invoices.
Resolution	Scan invoices at 300 DPI.
TIFF compression	Use CCITT Group IV compression where supported.
Page size	Use standard page sizes such as Letter or A4.
Orientation	Ensure invoices are scanned in the correct orientation.
Image quality	Avoid blurred, cropped, skewed, low-contrast, or unreadable images.
multipage invoices	Keep all pages of a single invoice in one file.
Multiple invoices	Prefer one invoice per attachment. If multiple invoices are included in one file, separate them with blank pages.
Supporting documents	Include supporting documents in the same file as the invoice and separate them clearly from invoice pages.
Unsupported content	Avoid password-protected files, embedded email attachments, and noninvoice content images such as signature images.

Use these standards for supplier communication, internal scanning teams, and Payables users who submit invoice documents manually.

During testing, validate scanned invoices from high-volume suppliers and adjust scanner settings before broader rollout.

Determine Business Unit Derivation Strategy

Before configuration begins, determine how business units will be derived for invoice processing.

Supported approaches include:

Standard Business Unit Derivation

Uses supplier, purchase order, or user profile information to derive the business unit.

Email Routing Attribute

Uses routing information supplied in the email subject.

Sender Email Address Mapping

Uses sender email address mappings maintained by administrators.

Recipient Email Address Mapping

Uses recipient email address mappings maintained by administrators.

Only one derivation method can be active at a time.

Organizations operating multiple business units should establish their business unit derivation strategy early in the project.

Prepare Compliance and Control Policy Documents

Compliance & Control uses approved policy details documents to create two related configuration objects.

- Policy: Defines the business purpose and rule structure.
- Policy Details: Stores the specific conditions and values evaluated during invoice processing.

Before configuring Compliance & Control:

- Identify the business condition, scope, exceptions, and required outcome for each policy.
- Identify the values required to create the Policy Details.
- Identify the Invoice Completion source and target attributes.
- Confirm that the required source and target attributes are supported.
- Identify the anomaly patterns required by the organization.
- Define the historical period, variation threshold, or comparison attributes for each anomaly pattern.
- Obtain approval from the appropriate business and control owners.

Use precise policy language. Replace ambiguous terms such as high value, appropriate account, or recent invoices with defined thresholds, values, or periods.

Confirm Environment Readiness

Confirm setup access, security privileges, test environments, invoice samples, and policy approvals before enabling Payables Agent.

Before enabling Payables Agent:

- Verify access to required setup pages.

- Verify required security privileges.
- Confirm testing environments are available.
- Confirm invoice samples have been collected.
- Confirm authorized users can access Compliance & Control.
- Confirm policy and control requirements have been reviewed by the appropriate business owners.

Users who configure or review Invoice Completion policies and anomaly controls require the applicable Manage Payables Compliance and Control or View Payables Compliance and Control privilege.

After activation, provide sufficient time for synchronization activities to complete.

Understand Synchronization Requirements

When Document Recognition and Processing Options are activated, supplier and purchase order information is synchronized to Payables Agent.

Changes to supplier data and purchase order formats may require up to 24 hours before they become available to the recognition engine.

Best practice is to:

1. Activate the feature.
2. Wait at least 24 hours.
3. Begin invoice testing afterward.

Define Rollout Strategy

Organizations should establish an adoption approach before beginning implementation.

Common approaches include:

Pilot Rollout

Enable Payables Agent for a limited supplier population and selected users before broader deployment.

Business Unit Rollout

Enable Payables Agent incrementally across business units.

Enterprise Rollout

Enable Payables Agent across the entire organization following successful testing.

Determine whether Invoice Completion and anomaly controls will be introduced with the initial Payables Agent rollout or in a later phase. When these capabilities are included, begin with a controlled set of policies and controls, validate the results, and refine the criteria before broader use.

4 Core Configuration Steps

Overview of Payables Agent Configuration

Complete the core configuration activities for Payables Agent in sequence.

Validate the outcome of each configuration before proceeding to the next activity.

Successful implementation depends on three key objectives:

- Establishing reliable invoice ingestion channels.
- Configuring invoice recognition and processing behavior.
- Enabling users to review, correct, and continuously improve invoice processing outcomes.

Enable Payables Agent

Activate Payables Agent invoice processing capabilities and initialize synchronization of supplier and purchase order information required for invoice recognition.

Payables Agent uses supplier master data and purchase order information when identifying suppliers, matching invoices, and deriving invoice attributes. Supplier and purchase order information must be synchronized before invoice testing begins.

To enable Payables Agent:

1. Go to **Navigator > My Enterprise > Setup and Maintenance > Financials > Payables > Manage Intelligent Document Recognition Options**.
2. Review the status.
3. If this is the first-time setup, select:
 - **Activate**, or
 - **Activate and Close**
4. Save the configuration.

After activation, supplier synchronization and purchase order format synchronization begin automatically. Changes to suppliers or purchase order formats may require up to 24 hours before becoming available for invoice recognition. Oracle recommends waiting at least 24 hours before beginning invoice testing.

Validate activation by confirming that the status displays as **Active**, the Payables Agent email endpoint is generated and visible, and activation completes successfully without errors.

Configure Document Recognition and Processing Options

Configure how Payables Agent recognizes, imports, validates, and creates invoices.

These settings determine how invoice attributes are processed and how invoices are created in Payables. Review each option and determine whether the default behavior aligns with business requirements.

Configuration area	Option	Purpose	Guidance
Tax recognition	Recognize Tax Amount	Controls whether tax amounts extracted from invoices are used during invoice import.	Enable when suppliers consistently provide accurate tax amounts and the organization wants imported tax amounts preserved. Disable when tax should always be derived using Oracle Tax calculations.
Tax recognition	Calculate Tax During Import	Determines whether tax calculations occur during invoice import.	Enable when tax validation should occur as early as possible. Disable when tax calculation should occur later during invoice validation.
Freight recognition	Recognize Freight Amount	Controls whether freight and shipping charges identified on invoices are imported.	Enable when freight costs should be imported as part of invoice processing. Disable when freight lines aren't required.
Freight recognition	Prorate Freight and Miscellaneous Charges	Determines whether freight and miscellaneous charges are prorated across invoice lines.	Enable when freight should be distributed proportionally across item lines. Disable when freight should be posted to dedicated freight distribution accounts.
Invoice line recognition	Recognize Lines for Matched Invoices	Determines whether invoice lines are imported and matched to purchase order lines.	Enable when the organization wants automatic PO line matching. Disable when only invoice headers should be imported or Payables users prefer to perform matching manually.
Invoice line recognition	Import Only Paired Lines for Matched Invoices	Determines whether invoice import includes only invoice lines successfully paired with a valid purchase order.	Enable when only paired lines should be imported for purchase order-matched invoices and unpaired lines should be excluded.
Invoice line recognition	Recognize Lines for Unmatched Invoices	Determines whether invoice lines are imported for invoices that don't reference purchase orders.	Enable when invoice line details are required for downstream processing. Disable when only invoice header information is required.
Legal entity recognition	Validate the Legal Entity Identified for Matched Invoices	Compares the legal entity identified on the invoice with the legal entity associated with the purchase order.	Enable when additional legal entity validation is required or the organization operates multiple legal entities and wants stronger controls. Before enabling, verify legal entity names and addresses

Configuration area	Option	Purpose	Guidance
			and confirm that supplier invoices display the same legal entity information.
Invoice creation behavior	Always Create Invoices in Incomplete Status	Forces all invoices to be created in Incomplete status regardless of recognition success.	Enable when all invoices require manual review or regulatory or audit requirements mandate invoice verification. Disable when the organization wants to maximize touchless processing.
Service order processing	Create Single Invoice Line for Service Orders	Creates a single invoice line equal to the invoice subtotal for service purchase orders.	Enable when suppliers provide detailed service breakdowns, purchase orders contain a single service line, and simplified matching improves processing efficiency.
Utility supplier processing	Create Single Invoice Line for Utility Suppliers	Creates a single invoice line equal to the invoice subtotal for suppliers identified as utility suppliers.	Enable when utility invoices contain large numbers of usage or meter-detail lines and detailed line recognition isn't required.

To configure document recognition and processing options:

1. Go to **Navigator > My Enterprise > Setup and Maintenance > Financials > Payables > Manage Intelligent Document Recognition Options**.
2. Review the available options.
3. Select the options that match the organization's invoice recognition, import, validation, and invoice creation requirements.
4. Save the configuration.

Validate the configuration by processing representative invoices and confirming that tax, freight, invoice line recognition, legal entity handling, invoice status, service invoice behavior, and utility invoice behavior match the selected options.

Configure Business Unit Derivation

Configure how Payables Agent assigns invoices to Business Units.

Business Unit derivation affects invoice ownership, accounting, routing, approvals, user visibility, and exception management. Only one Business Unit derivation method can be active at a time.

Derivation method	How it works	Recommended use
Standard Business Unit Derivation	Uses existing Oracle Payables logic. For matched invoices, the Business Unit is derived from the purchase order. For unmatched invoices, the Business Unit is derived from the supplier site. If neither source is available, the Business Unit is derived from the DEFAULT_ORG_ID profile option.	Use when purchase order and supplier-site setup reliably determine the Business Unit.

Derivation method	How it works	Recommended use
Email Routing Attribute	Derives the Business Unit from information embedded in the email subject.	Use when suppliers submit invoices for multiple Business Units, the organization operates only a few Business Units, or email mapping isn't practical.
Sender Email Address Mapping	Derives the Business Unit from the sender's email address.	Use when supplier sender addresses consistently map to Business Units.
Recipient Email Address Mapping	Derives the Business Unit from the recipient email address.	Use when the organization maintains multiple invoice mailboxes for different Business Units, regions, or operating groups.

To configure Business Unit derivation:

1. Go to **Navigator > My Enterprise > Setup and Maintenance > Financials > Payables > Manage Intelligent Document Recognition Options**.
2. Review the Business Unit derivation options.
3. Select the required email-based Business Unit derivation mode.
4. Open **Configuration > Capture > Streams**.
5. Select **Invoice Image Documents**.
6. Open **Email-to-Business Unit Mapping** from the stream actions menu.
7. Create the sender or recipient email mappings required by the selected derivation mode.
8. Save and test the mappings.

Submit test invoices for the selected derivation method and confirm that Business Units are assigned correctly, routing behavior matches expectations, and invoices appear under the appropriate Business Unit.

Configure Invoice Submission Channels

Establish invoice intake channels that suppliers can use to submit invoices.

Oracle recommends using a corporate mailbox rather than exposing the Oracle-generated Payables Agent endpoint directly to suppliers.

Example submission flow:

- Supplier sends invoice to invoices@samplecompany.com.
- Corporate mailbox forwards the email automatically.
- Payables Agent endpoint receives and processes the invoice.

Using corporate aliases provides simplified supplier communication, better monitoring, improved traceability, spam protection, and easier Business Unit segmentation.

To configure invoice submission channels:

1. Identify the Oracle-generated Payables Agent endpoint.
2. Create one or more corporate invoice mailboxes or aliases.
3. Configure forwarding from each corporate mailbox or alias to the Payables Agent endpoint.
4. Confirm that forwarding rules preserve invoice attachments.
5. Communicate the approved invoice submission address to suppliers and internal submitters.

6. Submit test invoices through the configured mailbox or alias.

Validate invoice submission by confirming that emails reach the Payables Agent endpoint, attachments are processed, and invoice documents appear in **Invoice Document Streams**.

Configure Partner e-Invoicing with Thomson Reuters

Enable receipt of supplier e-invoices through Thomson Reuters and make those invoices available in the Partner e-Invoice Integration Stream.

The integration supports the receipt of e-invoices through Thomson Reuters and is part of the Payables Agent ingestion model.

Before enabling the integration, complete the Thomson Reuters agreement, provision the buyer account, and complete any required buyer registration for Peppol-based countries. The source material also notes that legal entity name, address, and registration number may need to be provided to Thomson Reuters.

To configure e-invoicing using Thomson Reuters:

1. Finalize the Thomson Reuters e-invoicing agreement and collect the required legal entity details.
2. Ensure the buyer account is provisioned in the Thomson Reuters portal.
3. If applicable, complete buyer registration through the Peppol network.
4. Raise a Service Request with Oracle to enable Partner E-Invoice Integration.
5. Go to **Navigators > My Enterprise > Manage Thomson Reuters Services**.
6. Select **Configure for Activation**.
7. Select **Payables** and select **Activate**.
8. Authenticate in the Thomson Reuters OneSource portal and provide consent for the Oracle UI authorization flow.
9. Return to Oracle Fusion Cloud ERP and confirm that the service status is **Completed**.
10. Optionally enable Payables Agent to view incoming Thomson Reuters invoices in the **Invoice Stream** view.

Validate the integration by confirming that the Thomson Reuters service status shows **Completed**, submitting a test e-invoice, verifying that the e-invoice appears in the **Partner e-Invoice Integration Stream**, and confirming that the invoice can be tracked and managed from the stream.

Configure Requester Recognition

Configure requester recognition so Payables Agent can identify the requester from requester email addresses that appear on invoice documents.

Multiple domains should be separated using semicolons.

To configure requestor recognition:

1. Open **Configuration > Capture > Streams**.
2. Select **Invoice Image Documents**.
3. Open **Requester Email Domain Configuration**.
4. Enter the trusted organizational domains. For example:
 - o oracle.com

- samplecompany.com
- subsidiary.com

For multiple domains, enter values using semicolons, such as samplecompany.com;subsidiary.com. Don't include spaces in domain names.

5. Separate multiple domains with semicolons and don't include spaces.
6. Save and validate requester recognition with representative invoice documents.

Validate requester recognition by submitting invoices that contain requester email addresses and confirming that requester information is populated correctly.

Configure Capture Endpoints and Stream Actions

Use Capture and the Streams page to review document-ingestion endpoints and maintain configuration that is specific to a document stream.

The **Document Receiving Endpoints** page displays the endpoints required for supported document flows, including the Supplier Invoice Document IO Integration Service endpoint.

Providing these endpoints in one location helps administrators identify the correct ingestion channel without searching across separate setup pages.

For the **Invoice Image Documents** stream, stream-specific actions support:

- Email-to-Business Unit mapping
- Requester email-domain configuration
- Stream activation for new customers

To configure Capture endpoints and stream actions:

1. Open Payables Agent and select **Configuration**.
2. Select **Capture**.
3. Open **Document Receiving Endpoints** and record the endpoints required by the organization.
4. Open **Streams** and select **Invoice Image Documents**.
5. Open the stream actions menu.
6. If Business Unit derivation uses sender or recipient email addresses, maintain the applicable email-to-Business Unit mappings.
7. Configure one or more trusted requester email domains used to identify requesters from invoice documents.
8. For a new implementation, select **Activate** to enable the **Invoice Image Documents** stream.
9. Save the configuration.

Existing Intelligent Document Recognition customers don't need to activate the Invoice Image Documents stream because it is enabled automatically for those implementations.

Validate the setup by confirming that:

- The required supplier-invoice and payment-request endpoints are visible.
- Email-to-Business Unit mappings are available only for the selected email-based derivation mode.
- Requester domains can be maintained from the Invoice Image Documents stream action.
- The Invoice Image Documents stream is active for a new implementation.

- Test documents appear in the correct stream and Business Unit.

Configure Document Throttling

Document throttling enables organizations to pause the first occurrence of a previously unseen document format for user review before automated processing continues.

When the Ingestion Agent receives a document with a new fingerprint that meets the configured throttling criteria, the document is assigned the **New Format Detected** status and paused. Users can open the document in the **Training** view, review the Generative AI-generated mappings, modify the mappings where necessary, and save the result for future documents.

The New Format Detected workflow is triggered only when the applicable document-throttling lookup is configured and enabled. The document is paused only for the first occurrence of a previously unseen fingerprint that meets the throttling criteria. After the mapping is reviewed and saved, subsequent documents with the same fingerprint are processed automatically and aren't paused again, even when they continue to meet the throttling criteria.

Configure throttling using the following lookup types and codes:

Document type	Throttling criterion	Lookup type	Lookup code or value
Image-based documents	New document fingerprint	AP_DOCIO_IMAGE_DOC_THROTTLING	THROTTLING_NEW_FINGERPRINT

These lookup types aren't predefined. Create them according to the organization's throttling requirements and set **REST Access Secured** to **Authenticated** for each lookup type.

To configure and validate document throttling:

1. Identify the document populations for which new formats must be reviewed before processing.
2. Create the applicable new lookup types and lookup codes.
3. Configure image-document throttling when newly detected image layouts must be reviewed.
4. Set **REST Access Secured** to **Authenticated** for each lookup type.
5. Submit a document with a previously unseen fingerprint that meets the configured criteria.
6. Confirm that the document is assigned the **New Format Detected** status.
7. Open the document in the **Training** view.
8. Review and correct the generated mappings.
9. Save the reviewed mapping.
10. Submit another document with the same fingerprint.
11. Confirm that the subsequent document is processed automatically without being paused again.

When configuring throttling:

- Configure a throttling lookup only when review of new document formats is part of the organization's processing model.
- Review every document marked New Format Detected and validate the generated mappings before saving them.
- Save reviewed mappings so future documents with the same fingerprint can be processed automatically.
- Don't expect the New Format Detected status when the corresponding throttling lookup hasn't been configured and enabled.

- Don't expect every document that meets the throttling criteria to be paused. Only the first occurrence of a new fingerprint is stopped for review.
- Don't expect a previously reviewed fingerprint to be throttled again after its mapping has been saved.
- Avoid broad throttling rules when manual review of new formats isn't required, because broad rules can increase initial user intervention.

Configure Routing Rules

Configure routing rules to determine who reviews invoices that require manual intervention.

By default, incomplete invoices are routed to users associated with the Accounts Payable Specialist and Accounts Payable Supervisor responsibilities. Organizations can also create custom routing rules based on Business Unit, routing attributes, invoice classifications, or organizational responsibilities.

Example: Route invoices marked with Routing Attribute 1 = Urgent to a dedicated Payables review team.

To configure routing behavior:

1. Review the default routing behavior for incomplete invoices.
2. Identify the user groups that must review invoices requiring manual intervention.
3. Determine whether routing should vary by Business Unit, routing attribute, invoice classification, or operational responsibility.
4. Configure custom routing rules where required.
5. Submit representative invoices that should trigger the routing rules.

Validate routing by confirming that incomplete invoices route correctly, workflow notifications are generated, and assigned users can access the invoices.

Configure Enhanced Invoice Learning

The enhanced Learning UI provides one workspace for reviewing and improving invoice-document mappings for unstructured documents.

Payables Agent can process invoices using AI-based recognition before training is performed. Training is typically completed once per invoice layout, with priority given to high-volume suppliers, recurring layouts, and suppliers that generate frequent recognition issues.

Additional Enhanced Learning Capabilities

The enhanced **Learning UI** includes planned support for learning Descriptive Flexfields and Global Descriptive Flexfields. Where context is required, users will be able to provide context-sensitive instructions that help the application resolve flexfield segments and regional attributes.

For PDF and image invoices, the **Learning UI** provides an annotation-based experience. Users review the source document beside the invoice preview and identify missing or incorrect values directly on the document.

Saved corrections are associated with the document fingerprint. When applicable, the learning is reused for future documents and can be propagated to other invoices with the same fingerprint, reducing repeated corrections.

To configure and validate learning:

1. Select the representative unstructured documents.
2. Open the document in the **Learning UI**.
3. Review the source attributes and mapped invoice attributes.
4. For image or PDF invoices, annotate missing or incorrect values where required.
5. Save the learning.
6. Reprocess an applicable document or submit another document with the same fingerprint.
7. Confirm that the corrected mapping or transformation is reused.

Configure Compliance and Control Policies

Compliance & Control policies are uploaded from the Compliance and Control page and then reviewed, validated, and activated.

To configure policy details:

1. Open **Payables > Configuration > Compliance and Control**.
2. Open **Policy Details**.
3. Download the Policy Details to Excel.
4. Update the spreadsheet with the required target values for the applicable supported criteria.
5. Upload the completed spreadsheet.
6. Repeat validation until all errors are resolved.
7. Activate the configuration after all policy-detail validation errors are resolved.

Activation promotes the draft Policy and Policy Details to the active version. Only active policies are applied during invoice processing. Draft policies are retained for configuration review and the next activation cycle.

Policy Validation and Activation Behavior

Policy-level validation errors can occur when:

- A Policy Detail refers to an unavailable or inactive value.
- A Policy Detail omits a required supporting attribute. For example, Primary Ledger is required to derive an account combination.

Correct policy-level errors in the source policy document, upload the revised document to AI Studio, publish it, and repeat the policy review.

Policy-detail validation errors can occur when:

- A Policy Detail refers to a value that is unavailable or inactive.
- A Policy Detail omits a required supporting attribute. For example, Primary Ledger is required to derive an account combination.

Correct Policy Detail errors by downloading the Policy Details to Excel, updating the missing or invalid information, and uploading the corrected spreadsheet. Repeat validation until all errors are resolved.

When the configuration is activated, the draft Policy and Policy Details become the active version. The newly activated set replaces the previously active Policy and Policy Details configuration. Active policies are used during invoice

processing and runtime evaluation. Draft versions are used to prepare the next configuration iteration and don't affect active invoice processing.

Invoice Completion Behavior

Invoice Completion policies can derive supported attributes in the following categories:

- Accounting
- Tax
- Project
- Asset
- Payment
- Localization

Create a separate policy for each target attribute. A policy populates the target attribute only when the field doesn't already contain a value. It doesn't override an existing value.

Some target attributes require specific source attributes:

- Distribution Set requires Business Unit.
- Project-related targets require Business Unit or Project, depending on the target.
- Distribution Account targets require Ledger.

Invoice Completion policies are applied during invoice import. They aren't applied to manually created invoices or invoices inserted directly into Payables base tables.

Anomaly Control Behavior

Available anomaly patterns include:

- Invoice Currency
- Remittance Bank Account
- High Invoice Amount
- Fraudulent Invoice
- Duplicate Invoice

For each applicable anomaly pattern, define the required historical period, variation threshold, or comparison attributes. A pattern isn't enforced until it is explicitly enabled.

Enable only the patterns required by the organization's policies. Test and tune the criteria before broader deployment to reduce false positives and unnecessary review activity.

Runtime Sequence

Invoice Completion policies are evaluated first to populate supported missing invoice attributes. Control policies are then evaluated to identify anomalies and other policy deviations.

Invoice Completion policies run during invoice import. Anomaly policies run during import for imported invoices and during validation for invoices created through other supported channels.

Control Policy Evaluation

Compliance and Control policies are evaluated automatically during invoice processing. Individual users don't need to trigger policy evaluation for each invoice.

Invoice Completion policies are evaluated first to populate supported internal attributes that are missing. Control policies are then evaluated to identify anomalies and other policy deviations. Control policies can also validate invoice information against related purchase orders or receipts. Transactions that deviate from the active policy criteria are marked and isolated for review.

This evaluation applies the same active business rules consistently to the applicable invoice population rather than relying on one-time or sampled checks.

Configure Invoice Completion Policies

Invoice Completion derives supported internal invoice attributes that aren't explicitly provided on supplier invoices.

Policies are defined using natural-language instructions in the Compliance & Control experience.

Supported target-attribute categories include:

- Accounting
- Tax
- Project
- Asset
- Payment
- Localization

Supported Invoice Completion Attributes and Criteria

The following Invoice Completion attributes and criteria are supported:

Subsection	Supported target attributes	Supported criteria or actions
Account Coding	Distribution Set; Distribution Combination; MPA Accrual Account	Business Unit; Legal Entity; Supplier Type; Stream; Primary Ledger; Payables Invoice Type; Project Number; Project Expenditure Type; Line Type
Tax Determinants	Document Fiscal Classification; Ship-to Location; Location of Final Discharge; Intended Use; Product Type; Product Category; User-Defined Fiscal Classification; Product Fiscal Classification; Transaction Business Category	Business Unit; Legal Entity; Supplier Type; Stream; Ship-to Location; Payables Invoice Currency; Project Number; Project Expenditure Type
Asset Details	Asset Book Type; Asset Category; Track as Asset Indicator	Business Unit; Legal Entity; Supplier Type; Stream; Product Type; Product Category; Ship-to Location
Project Details	Project Number; Project Task Name; Project Expenditure Type; Project Organization; Project Contract Number; Funding Source Name	Business Unit; Legal Entity; Supplier Type; Stream; Ship-to Location; Payables Invoice

Subsection	Supported target attributes	Supported criteria or actions
		Currency; Track as Asset Indicator; Project Contract Number; Project Number
Payment Details	Delivery Channel; Pay Group; Payment Reason	Business Unit; Legal Entity; Supplier Type; Stream; Payables Invoice Currency; Payment Currency

To configure an Invoice Completion policy:

1. Open Payables Agent.
2. Select the **Equalizer** icon.
3. Select **Compliance & Control**.
4. Open the **Invoice Completion** or **Defaulting** tab.
5. Select the **edit** icon to create or modify policies.
6. Enter the policy in natural language.
7. Review the generated rule on the canvas.
8. Save the policy.

Example instructions include:

- Set Header Attribute 1 to Demo when Business Unit is Vision India.
- Set User-Defined Fiscal Classification to AP_TAX_RECAL_UDFC when Header Attribute 1 is Demo.
- Set Pay Group to Standard when Requester is Green, Terry.

Create a separate policy for each target attribute. Don't define multiple target attributes in a single policy.

Some target attributes require specific source attributes:

- Distribution Set requires Business Unit.
- Project-related targets require Business Unit or Project, depending on the target.
- Distribution Account targets require Ledger.
- Global Descriptive Flexfields require Legal Entity Country.

Invoice Completion policies:

- Apply during invoice import.
- Populate a target only when the field is blank.
- Don't override an existing value.
- Don't apply to manually created invoices or invoices inserted directly into Payables base tables.

Validate each policy using representative imported invoices and confirm that the target value is populated only when the source condition is met.

Configure Anomaly Controls

Anomaly controls identify and mark invoices that deviate from defined criteria.

The controls are configured using natural-language instructions in the **Compliance & Control** experience.

Available anomaly patterns include:

- Invoice Currency
- Remittance Bank Account
- High Invoice Amount
- Fraudulent Invoice
- Duplicate Invoice

To configure anomaly controls:

1. Open **Payables** Agent.
2. Select the Equalizer icon.
3. Select **Compliance & Control**.
4. Open the **Controls** tab.
5. Select or describe the anomaly pattern to activate.
6. Specify the applicable criteria, such as:
 - Historical period
 - Variation percentage
 - Invoice attributes to compare
7. Review the generated control.
8. Activate and save the control.

Patterns aren't enforced until they are explicitly enabled.

An enabled anomaly pattern can be disabled when it is no longer required or while its criteria are being refined. Disabling the pattern stops future enforcement but doesn't delete the pattern.

When configuring controls:

- Select only patterns that support the organization's policies.
- Use historical periods and variation thresholds appropriate to the control objective.
- Avoid enabling all patterns without first tuning their criteria.
- Test each control using representative invoice scenarios.
- Refine criteria to reduce false positives.
- Use the Currency, Amount, Invoice Date, Supplier, Supplier Site, Purchase Order Number, and Invoice Header Description influence criteria only with the Fraudulent Invoice anomaly.
 - Use **yes** or **y** to enable these criteria. The control treats any other value, including **no**, **n**, or blank, as disabled.
 - Don't provide these criteria for anomaly types other than Fraudulent Invoice. Doing so results in an "unsupported influence attributes" validation error, regardless of whether the value is set to **yes** or **no**.
- Amount Variation is a percentage-based numeric field. For example, enter 100 to represent 100%.
- Enter Time Period as a numeric value that represents number of days. Don't enter text such as "Past 30 Days"; enter 30 instead.

Invoices identified with anomalies are surfaced for review and may move to a **Needs Revalidation** status during processing.

Schedule Invoice Import Processing

Automate invoice import processing by scheduling the invoice import process at a frequency that supports the organization's invoice volume and processing requirements.

Organizations typically schedule invoice imports:

- Once per day, or
- Twice per day

The appropriate schedule depends on invoice volume and processing requirements.

To schedule invoice import processing:

1. Go to **Navigator > Payables > Invoices**.
2. Open the **Tasks** panel.
3. Select **Import Invoices**.
4. Specify:
 - **Ledger**
 - **Source = Invoice Image**
5. Leave **Business Unit** blank.
6. Configure scheduling frequency.
7. Submit the process.

Validate the schedule by confirming that the scheduled process completes successfully, invoices import automatically, and processing volumes align with expectations.

Invoice Completion policies are applied during invoice import. The import schedule should therefore be included when validating policy behavior.

5 Optional Configurations

Overview of Optional Configurations

Optional configurations aren't required for basic Payables Agent adoption, but they can improve recognition accuracy, increase automation rates, simplify invoice processing, and reduce manual intervention.

Organizations should evaluate these options based on invoice volume, supplier complexity, operational requirements, and desired levels of automation.

Configure Supplier Recognition Enhancements

Improve supplier prediction accuracy and reduce supplier-related exceptions.

Supplier identification is one of the most important steps in invoice processing. Incorrect supplier prediction can lead to invoice routing issues, Business Unit derivation errors, matching failures, and increased manual review activities.

Payables Agent uses supplier information as part of its supplier prediction process. The following attributes contribute to supplier identification:

- Supplier name
- Street address
- City
- State
- Country
- Postal code
- Email address
- Phone number
- Fax number
- Website
- Tax registration numbers

To improve recognition accuracy:

- Ensure supplier names match invoice documents.
- Ensure supplier addresses match invoice documents.
- Minimize duplicate supplier site addresses.
- Regularly review supplier master data quality.

Payables Agent can optionally use supplier logos as part of supplier prediction. This capability helps improve recognition accuracy when invoice layouts are complex or when supplier names appear inconsistently across documents.

To enable supplier logo recognition:

1. Log a Service Request.
2. Request activation of:
 - enableLogoSupplierPrediction
 - useALforSupplierLogo
3. Validate supplier recognition after activation.

Supplier logo recognition can improve supplier prediction accuracy and reduce manual supplier corrections.

Configure Internal Supplier Handling

Control whether internal or intercompany suppliers participate in Payables Agent recognition.

Many organizations maintain internal suppliers for intercompany transactions. These suppliers can sometimes interfere with supplier prediction because invoice documents often contain buyer addresses that resemble internal supplier addresses.

Payables Agent supports two approaches:

- Exclude internal suppliers.
- Include selected internal suppliers.

Exclude internal suppliers when the organization processes only external supplier invoices through Payables Agent. Excluding internal suppliers improves supplier prediction accuracy, reduces supplier ambiguity, and minimizes incorrect supplier identification.

To exclude internal suppliers:

1. Create or identify a supplier type for internal suppliers.
2. Assign the supplier type to internal suppliers.
3. Configure the supplier type in AP_EXCLUDE_IMAGE_VENDOR_TYPE.
4. Save changes.

Validate the configuration by confirming that invoices from excluded supplier types aren't considered during supplier prediction.

Include selected internal suppliers when the organization intentionally processes invoices from specific intercompany suppliers through Payables Agent. This approach enables selective use of Payables Agent for intercompany invoice processing without affecting recognition accuracy for external suppliers.

To include selected internal suppliers:

1. Create a dedicated supplier type.

Example: INTERNAL_INCLUDE
2. Assign the supplier type to selected internal suppliers.
3. Log a Service Request.
4. Request activation of supplier recognition for the designated supplier type.

Validate the configuration by confirming that invoices from designated internal suppliers are successfully recognized.

Configure Service Order Optimization

Improve matching efficiency for service-based purchase orders.

Many service purchase orders contain a single service line, while supplier invoices contain numerous detailed service descriptions. This difference can create unnecessary matching complexity.

When **Create Single Invoice Line for Service Orders** is enabled:

- Detailed invoice lines aren't imported.
- A single invoice line is created.
- The invoice line amount equals the invoice subtotal.

Enable this option when:

- Service purchase orders contain one line.
- Supplier invoices contain many descriptive service lines.
- Detailed invoice line matching isn't required.

Service order optimization simplifies matching, reduces matching exceptions, speeds up invoice processing, and lowers review effort.

Validate the configuration by confirming that service invoices create a single invoice line, matching succeeds as expected, and invoice totals remain accurate.

Configure Utility Supplier Optimization

Simplify processing of utility invoices.

Utility invoices frequently contain meter readings, consumption details, usage calculations, and multiple informational lines. In many organizations, these details aren't required within Payables.

When **Create Single Invoice Line for Utility Suppliers** is enabled:

- Utility suppliers are identified using supplier type.
- Detailed invoice lines are suppressed.
- A single invoice line is created using the invoice subtotal.

Enable this option when:

- Utility suppliers generate complex invoice layouts.
- Detailed line processing provides little business value.
- Accounting distributions are managed through predefined rules.

Utility supplier optimization can improve recognition rates, reduce exceptions, speed up invoice creation, and lower manual review effort.

Validate the configuration by confirming that utility invoices are imported successfully, single-line invoices are created correctly, and invoice totals remain accurate.

Configure Routing Attributes

Capture additional business information that is specific to organizational processes.

Payables Agent supports four routing attributes. Routing attributes can be captured from email subject lines, used in routing decisions, used for reporting, and learned through adaptive learning.

Attribute	Typical use
Routing Attribute 1	Business Unit, Priority
Routing Attribute 2	Supplier Category
Routing Attribute 3	Plant, Facility
Routing Attribute 4	Department, Storage Area

Example email subject:

Invoice-12345_Urgent_Operations_Plant-1_Storage-A

The routing attributes are populated as follows:

Attribute	Value
Routing Attribute 1	Urgent
Routing Attribute 2	Operations
Routing Attribute 3	Plant-1
Routing Attribute 4	Storage-A

Routing attributes enable automated routing, additional invoice classification, business-specific processing rules, and improved reporting and visibility.

Validate routing attributes by confirming that routing attributes populate correctly, workflow rules recognize attribute values, and reporting includes routing information where applicable.

For organizations operating across multiple Business Units, sender or recipient email mapping can improve routing accuracy and reduce manual corrections. Configure these mappings as part of Business Unit derivation.

Configure Adaptive Learning Across Environments

Reuse learning investments across environments.

Organizations often perform extensive invoice training in test environments before production rollout, and adaptive learning data can be transferred between environments.

A typical migration scenario includes:

- Training performed in test.
- Learning validated.
- Learning copied to production.

To migrate adaptive learning data:

1. Complete training activities.
2. Identify the required learning date range.
3. Log a Service Request.
4. Request learning migration.

Adaptive learning migration can support faster production readiness, reduce production training effort, improve day-one recognition rates, and accelerate adoption.

6 User Access and Experience

Enable User Access

After Payables Agent configuration is complete, provision users with the privileges, roles, permission groups, and Business Unit data access required to perform their assigned responsibilities.

Payables Agent includes user experiences for invoice ingestion setup, stream monitoring, invoice training, source-document review, invoice exception management, and Compliance & Control configuration. Access to these capabilities is controlled through privileges, duty roles, permission groups, and Business Unit data security.

Users must have both page or action access and Business Unit data access. Page access alone doesn't ensure that users can see invoice data.

Define User Roles and Responsibilities

Different user groups interact with Payables Agent in different ways.

User Group	Primary Responsibilities
Payables Administrator	Configure invoice-ingestion settings, document-recognition options, Business Unit derivation, routing rules, training activities, and operational monitoring. Configure Invoice Completion policies and anomaly controls when assigned the required Compliance & Control privilege.
Accounts Payable Specialist	Review incomplete invoices, correct recognition errors, manage invoice exceptions, review invoice streams, and participate in adaptive-learning activities.
Accounts Payable Supervisor	Monitor processing performance, review exception trends, oversee invoice-correction activities, review recognition metrics, and support operational governance.
Security Administrator	Create and manage custom roles, assign privileges, configure permission groups, configure Business Unit data access, and validate user access.

Review Payables Agent User Experience

Payables Agent introduces several new user experiences that support invoice processing activities.

Experience	Purpose	Typical Users
Capture	- Review document receiving endpoints - Configure ingestion settings - Review stream definitions	- Payables Administrators - Implementation Consultants - Application Administrators

Experience	Purpose	Typical Users
	Manage email routing configurations	
Invoice Document Streams	- Monitor inbound invoice activity - Review processing status - Search and filter invoice documents - Drill into invoice details.	- Accounts Payable Specialists - Accounts Payable Supervisors - Shared Services Operations Teams
Invoice Document Training	- Upload invoice samples - Review extracted attributes - Perform training through annotation exercise - Save training information - Monitor learning outcomes	- Payables Administrators - Invoice Training Specialists - Implementation Teams
Invoice List	- Search invoices - Review rejected invoices and policy violations - Filter invoice populations - Launch correction activities - Monitor invoice status	- Accounts Payable Specialists - Accounts Payable Supervisors - Shared Services Operations Teams
Compliance & Control	Create, modify, or review Invoice Completion policies and anomaly controls	- Authorized Payables Administrators - Business Process Owners - Control-policy reviewers

Use the Unified Streams and Training Experience

The Streams UI provides a unified experience for Invoice Document Streams and Invoice Document Training.

Users can manage document processing and document-layout learning from one interface.

Smart Filters support switching between the **Streams** and **Training** views. The **Streams** view is displayed by default. Common document details, filtering, sorting, and security controls are available consistently across both views. Document upload continues to be available from the **Training** view.

The unified experience simplifies navigation, improves visibility across invoice processing and training, and provides a consistent workflow for operational review and layout learning.

The Streams UI also includes an enhanced **Tables View** that users can open through the **List View/Tables View** toggle. In **Tables View**, users can:

- Review document-sender information.
- Sort documents using additional attributes.
- Select the information most relevant to the review.

- Manage large volumes of invoice documents using a tabular presentation.
- The enhanced view improves document visibility and provides a more flexible way to review and manage invoice-document activity.

Use the Payables Agent Home Page

The Payables Agent Home page combines inquiry, navigation, suggested prompts, and prioritized insights in one landing experience.

It gives users a consistent starting point for agent-assisted Payables tasks without requiring them to know which page, report, or task to open first.

Users can:

- Enter a natural-language request in **Ask Payables Agent**.
- Select a suggested prompt and provide only the parameters required for the inquiry.
- Find invoices, rejections, policy violations, and approval backlogs.
- Review **Top Insights** and open the full **Insights** experience.
- Continue the inquiry in the hybrid chat-and-canvas workspace.

Here are some suggested prompts:

Suggested Prompt	Purpose
Show me invoices with [Invoice Number], [Supplier Name], [Amount], [Invoice Creation Date From/To], and [PO].	Find a specific invoice or a narrowly defined invoice population.
Show me rejected invoices for [Supplier Name] and [Invoice Creation Date From/To] pending for greater than [7] days.	Identify aging import rejections that require correction.
Show me invoices with policy violations for [Supplier Name] and [Invoice Creation Date From/To] pending for greater than [7] days.	Review aging anomalies or control violations.
Show me invoices pending approval for [Stream], [Invoice Amount Range], and [Days Pending from Invoice Creation Date].	Identify approval bottlenecks and prioritize overdue approvals.

Prompt parameters are optional unless the request requires a particular value. Users can omit values to return broader results and add supplier, date, amount, stream, or aging criteria when a targeted result is required.

After a request is submitted, Payables Agent opens the related chat-and-canvas experience so the user can review the records, ask follow-up questions, and take an appropriate action in the relevant Payables page.

Effectively Using the Home Page

The Home page displays a personalized header, the **Ask Payables Agent** input, suggested-prompt menus, and **Top Insights**.

Insight cards are prioritized using the insight priority level and the recency of the last occurrence.

Use the following guidance when working from the Home page:

- Ask one focused question at a time. Don't combine several unrelated inquiries in one prompt.
- Populate only the prompt parameters that are relevant to the inquiry. Applying unnecessary criteria can exclude invoices or documents that still require review.
- Add details such as supplier, invoice number, invoice-creation date range, amount range, stream, status, or days pending when a targeted result is required.
- Use a specific date range or number of days pending when timing affects audit, period-close, or payment decisions.
- Review the returned records and supporting details before resolving, approving, escalating, or changing invoice work.
- Don't treat the first Agent response as the final business decision.
- Don't expect **Top Insights** to display every open issue. Select **View All** or open the applicable detail page when the complete insight population is required.

Don't include sensitive, confidential, or unnecessary information in free-form prompts. Provide only the business information required to find or analyze the applicable Payables work.

Review Payables Agent Insights

Payables Agent Insights presents prioritized invoice-processing signals that require attention.

Each insight identifies the condition that was detected, explains why it matters, and provides a path to the related invoice or configuration context.

The 26C insight population focuses on:

Insight	What it surfaces	Typical follow-up
Invoices with anomalies detected	Duplicate, high-amount, remittance-bank-account, currency, or other risk-related signals	Review the invoice and correct, cancel, or override it according to policy and user access.
Blocked invoices due to processing exceptions	Validation, hold, match, funds, terms, distribution, or other processing exceptions	Correct transaction data, resolve a releasable hold, or address missing setup.
Rejected invoices requiring action	Import rejections that prevent invoice creation	Review the rejection, correct the data or configuration, and reprocess the invoice.
Backlogged invoices requiring immediate attention	Aging or accumulating invoices that require prioritization	Assign ownership, resolve blockers, and monitor aging.

Insights are generated by monitoring prompts. A monitoring prompt defines the condition to evaluate, its execution timing, the recipient role or user, and the context included in the resulting insight.

Users can perform lifecycle actions such as:

- **Show More**

- **View Details**
- **Mark as Reviewed**
- **Dismiss**
- **Reopen**

The application can mark an insight Obsolete when newer insight data supersedes it.

Mark as Reviewed indicates that a user analyzed or acted on an insight. **Dismiss** indicates that the user decidedn't to pursue the insight for the current work.

Authorized users can review Oracle-delivered monitoring prompts, enable or disable prompts, and clone prompts to adjust supported execution settings such as frequency, time frame, priority, and enablement. Predefined monitoring conditions remain read-only, and creation of entirely new monitoring prompts isn't supported in the documented 26C experience.

Before changing invoice or configuration data, verify the current transaction state. An insight describes the condition at generation time and mightn't reflect later activity.

Manage Insights and Monitoring Prompts

Use the Insights page as a daily triage list before moving to detailed invoice lists, reports, or configuration pages.

When reviewing insights:

- Open **View Details** before taking action. Review the complete description, category, priority, last-observed time, and available comments to understand why the insight was generated.
- Use **Show More** to continue in the related invoice, Agent conversation, landing page, or configuration context instead of starting a separate search.
- Add meaningful comments when marking an insight as reviewed or dismissing it. Record the action taken, reason for dismissal, or follow-up owner so other users can understand the decision.
- Treat repeated insights as an upstream improvement signal. When the same supplier, rejection, anomaly, exception, or configuration issue appears repeatedly, investigate the underlying cause rather than resolving each invoice independently.
- Confirm that users have the downstream invoice, configuration, and Business Unit access required to act on the insights they receive.

Treat monitoring prompts as operational controls. Authorized users should understand:

- Which prompts are enabled.
- Who receives the generated insights.
- How frequently each prompt runs.
- Whether the configured timing matches the operating cadence.
- Whether the prompt priority and assignment remain appropriate.

Review prompt effectiveness periodically. High dismissal rates, recurring insights, or low action rates can indicate that prompt timing, priority, assignment, or the related business process requires adjustment.

The Insights search field locates insights. It doesn't provide the **Ask Payables Agent** conversational experience.

Restrict monitoring-prompt administration using least privilege. Don't disable a high-priority prompt without governance approval. Record why the prompt was disabled and who approved the change.

When a monitoring prompt is disabled, future evaluations stop. Previously generated insights remain available for reference, audit, and analysis.

The application can assign an insight the **Obsolete** status when newer insight data supersedes it. **Obsolete** is a terminal status that application assigns; it isn't typically available for reopening.

Use the NLP-Based Chat-Assisted Invoice List

The Invoice List is a multipane workspace with a NLP-based chat assistant on one side and an interactive data canvas on the other.

Users describe the invoice population they need in natural language, and the Agent displays the matching records on the canvas.

A query is required to populate the canvas. Users can start a new search by entering a new independent request rather than clearing traditional filters.

Once results are displayed, users can select the invoice number to open the **Edit Invoice** or **View Invoice** page according to their security access. When they return to the Invoice List, the original query context remains available on the canvas.

Invoice-level actions

Supported invoice-level actions include:

- **Validate Invoice:** Run invoice validation and related compliance checks.
- **Cancel Invoice:** Stop processing an invoice confirmed to be invalid, fraudulent, or a duplicate.

Exception-level actions

An invoice can have more than one anomaly or hold. Open the panel drawer and use the **Anomalies** and **Holds** tabs to review and resolve each exception individually.

- **Override Anomaly:** Release a specific anomaly when the reviewer determines that it shouldn't block processing.
- **Release Hold:** Release a user-releasable hold so the invoice can continue processing.

To resolve an exception:

1. Open the invoice panel drawer.
2. Select the **Anomalies** or **Holds** tab.
3. Select the individual exception.
4. Enter a reason or comment when required.
5. Confirm the action.

Manual overrides and hold releases are recorded in the invoice audit trail with the user identity.

Correct rejected invoices

1. Ask the Agent to display the required rejected invoices.

2. Select **Open Correction Spreadsheet** from the populated canvas.
3. Review the records in the VBAF workbook.
4. Correct the **Header** and **Line** worksheets.
5. Upload the changes.
6. Run the Payables Invoice Import process to reprocess the corrected invoices.

Oracle Visual Builder Excel Add-in must be installed to use the workbook.

Don't use the conversational Agent to clear exceptions in bulk. Review and resolve anomalies and holds individually.

Invoice List Scope and Action Behavior

When users drill down from Invoice Document Streams, the Invoice List canvas initially displays the invoices related to the selected document. Users can then ask the Agent to expand or refine the population, such as displaying successfully processed invoices or invoices that require manual intervention.

The Invoice List displays active invoices and invoices formally rejected by the Invoice Import process. Interface invoices that are waiting for the Invoice Import process to run aren't displayed.

Invoice-level actions have the following behavior:

- **Validate Invoice:** Runs invoice validation, policy verification, and applicable compliance checks. When anomalies are identified, the invoice is marked. When validation completes without issues, the invoice status is updated according to the completed processing outcome.
- **Cancel Invoice:** Permanently stops processing for an invoice confirmed to be invalid, fraudulent, or a duplicate. The invoice status changes to **Cancelled**, and the invoice doesn't continue through recording or payment processing.

Exception-level actions have the following behavior:

- **Override Anomaly:** Releases a selected application-generated anomaly, such as a confirmed false positive. The invoice can resume processing after all other blocking exceptions are resolved.
- **Release Hold:** Clears a selected user-releasable hold so the invoice can continue through the standard processing flow.

The **Open Correction Spreadsheet** action is context-dependent. It is available when the canvas displays invoices rejected by Invoice Import and isn't intended for active invoices. When opened, the VBAF workbook downloads the selected rejected invoices based on the active dataset displayed on the canvas.

Users with read-only access can open invoice-number links and review invoice details but can't perform overrides, cancellations, hold releases, or other update actions. Users performing these actions require the applicable edit or management access.

Traditional saved filters and static custom views aren't required in the conversational workspace. To begin a separate search, enter a new independent request in the **Agent** pane.

Payables Agent Duty Roles

This topic lists the duty roles that grant access to Payables Agent pages and their view or edit access.

Access to new feature components and pages is managed through duty roles tailored to the underlying design requirements.

Duty Role	UI Access	View Access	Edit Access
Payables Invoice Documents Processing Duty	Stream	Yes	Yes
Payables Invoice Documents Processing Duty	Training	Yes	Yes
Payables Invoice Documents Processing Duty	View Invoice (Redwood Page)	Yes	NA
Payables Invoice Documents Processing Duty	Document Attachment (Source File)	Yes	NA
Payables Invoice Documents Inquiry Duty	Stream	Yes	No
Payables Invoice Documents Inquiry Duty	Training	Yes	No
Payables Invoice Documents Inquiry Duty	View Invoice (Redwood Page)	Yes	NA
Payables Invoice Documents Inquiry Duty	Document Attachment (Source File)	No	NA
Payables Invoice Configuration Processing Duty	Capture	Yes	Yes
Payables Invoice Configuration Processing Duty	Compliance and Control	Yes	Yes
Payables Invoice Configuration Inquiry Duty	Capture	Yes	No
Payables Invoice Configuration Inquiry Duty	Compliance and Control	Yes	No
Payables Invoice Processing Duty	Invoice List	Yes	Yes (Limited actions)
Payables Invoice Processing Duty	Invoice (Classic Page)	Yes	Yes
Payables Invoice Inquiry Duty	Invoice List	Yes	No
Payables Invoice Inquiry Duty	Invoice (Classic Page)	Yes	No
Payables Invoice Inquiry Duty	Overview Page	Yes	NA
Payables Agent Insights Duty	Insights	Yes	NA
Payables Agent Monitoring Prompt Management Duty	Insights Monitoring Prompts	Yes	Yes

Configure Business Unit Data Security

Page or action access controls what users can open.

Business Unit data security controls which invoice data users can see and act on. Users who review invoice documents, manage invoice exceptions, download source documents, or correct invoices must be assigned access to the appropriate Business Units.

Any custom job roles assigned with the new invoice-related duty roles must also be granted Business Unit data security access. Otherwise, users cannot view invoice details.

Configure Business Unit data access using the **Manage Business Unit Data Access for Users** task. Assign the user, role, and Business Unit combination, then process permission group policies. The source security guidance confirms that users need Business Unit security to drill down from Streams to Invoice List, view invoices, and search invoices directly from Invoice List.

To configure business unit data access:

1. Go to **Navigator > My Enterprise > Manage Business Unit Data Access for Users**.
2. Select the user.
3. Select the custom role.
4. Grant access to the required Business Units.
5. Process **Permission Group Policies**.
6. Save your changes.
7. Verify completion.

After Business Unit access is configured and permission group policies are processed, confirm that users can view invoices for their assigned Business Units. Users should also be able to search invoices in Invoice List, drill down from Invoice Document Streams to Invoice List, and open invoice details for authorized Business Units.

Process Permission Group Policy

Permission group policies must be processed after security changes so that role assignments and data-access permissions are applied to Payables Agent pages.

When to process permission group policies	Why it matters	Validation
New Payables Agent users are provisioned	Applies role and permission group assignments.	User can access assigned Payables Agent pages.
New Payables Agent privileges are added to a role	Applies updated page or action access.	User can perform the newly assigned activity.
Business Unit access is assigned or changed	Applies invoice data security.	User sees only invoice data for assigned Business Units.
Custom roles are created or updated	Applies role changes to affected users.	User access matches the updated role design.
Users report page access but no data	Ensures permission group and data security changes are applied.	User can view authorized invoice records after processing.

Security roles for Payables Agent must be compatible with the permission-group-based architecture. Data access must be granted through roles enabled for permission groups, and Business Unit security must be assigned with those roles. Don't assume that data security from classic roles applies automatically to Payables Agent features.

Validate User Access

Validate access with representative users before broader rollout.

Test both page access and invoice data visibility.

Validation area	Test activity	Expected result
Capture	Test a Payables Administrator or implementation user.	User can review or manage Capture configuration based on assigned privilege.
Invoice Document Streams	Test a Payables Specialist or Supervisor.	User can monitor invoice documents for assigned Business Units.
Invoice Document Training	Test an authorized training user.	User can upload, review, correct, and save training information if edit access is assigned.
Source Documents	Test a user with source document download access.	User can download source documents only for invoices in assigned Business Units.
Invoice List	Test a Payables Specialist or Supervisor.	User can search, filter, and manage invoices for assigned Business Units.
Correction Spreadsheet	Test a user responsible for correcting import errors.	User can open and use the Correction Spreadsheet for authorized invoices.
Compliance & Control - Manage	Test a user with Manage Payables Compliance and Control.	User can create, modify, and save Invoice Completion policies and anomaly-control configurations.
Compliance & Control - View	Test a user with View Payables Compliance and Control.	User can review configurations but can't modify them.
Business Unit isolation	Test users assigned to different Business Units.	Users see only invoices for their assigned Business Units.
Negative access test	Test a user without training, source document, or correction access.	User can't perform restricted activities.

Only users with the appropriate Manage or View Payables Compliance and Control privilege should define or review policies.

Follow Security Best Practices

Follow least-privilege, Business Unit data security, permission-group, and access-validation practices when securing Payables Agent.

Do	Don't
Assign privileges based on user responsibility.	Don't grant administrator access to operational users who need only review access.
Assign Business Unit data security with page or action access.	Don't assume page access is enough for users to see invoice data.
Use roles that are enabled for permission groups.	Don't assume classic Payables role inheritance applies to Payables Agent pages.
Process permission-group policies after role, privilege, or Business Unit changes.	Don't validate access before permission-group processing is complete.
Restrict Capture edit access to administrators and implementation users.	Don't enable broad access to ingestion setup.
Restrict Invoice Document Training edit access to authorized training users.	Don't enable every invoice processor to update training data.
Restrict Compliance & Control management access to authorized policy owners.	Don't enable users without policy responsibility to create or modify Invoice Completion policies or anomaly controls.
Assign view-only Compliance & Control access to users who need oversight butn't configuration authority.	Don't grant management access when view access is sufficient.
Assign source-document download access only where required.	Don't expose original invoice documents to users who don't need them.
Validate access using pilot users from each role group.	Don't validate only with administrator accounts.
Document the mapping between user groups, roles, privileges, and Business Units.	Don't leave access decisions undocumented before production rollout.
Keep permission-group-based access and individual privilege design cleanly separated where required.	Don't mix incompatible security architectures within a single duty role.

7 Validation and Testing

Why Is Testing Required?

Validation and testing are critical to achieving successful Payables Agent adoption.

While Payables Agent can begin processing invoices immediately after activation, recognition accuracy, supplier prediction, Business Unit derivation, exception handling, invoice completion, and anomaly-control behavior should be validated before broader deployment.

Organizations that invest sufficient time in testing typically achieve higher automation rates, lower exception volumes, and faster user adoption.

Testing Objectives

Testing validates Payables Agent processing, learning, controls, and recognition performance before production rollout.

The primary objectives of testing are to:

- Validate invoice ingestion.
- Validate supplier recognition.
- Validate invoice attribute extraction.
- Validate Business Unit derivation.
- Validate routing and workflow behavior.
- Validate invoice creation.
- Validate adaptive learning.
- Validate bulk learning and reprocessing.
- Validate Invoice Completion policies.
- Validate anomaly controls and policy-violation handling.
- Establish baseline recognition metrics.
- Identify configuration adjustments before production rollout.

Testing should be performed using representative invoices from actual suppliers rather than synthetic examples whenever possible.

Testing Prerequisites

Before testing begins, verify the following activities have been completed.

Configuration Readiness

Verify:

- Payables Agent is activated.
- Document Recognition and Processing Options are configured.
- Invoice submission channels are operational.
- Business Unit derivation is configured.
- Routing rules are configured.
- Invoice Completion policies are configured, if applicable.
- Anomaly controls are configured and activated, if applicable.

Security Readiness

Verify:

- User access is provisioned.
- Business Unit security is configured.
- Permission group policies have been processed.
- Users who manage or review Compliance & Control have the required privileges.

Synchronization Readiness

Verify:

- Supplier synchronization has completed.
- Purchase order synchronization has completed.

Oracle recommends waiting at least 24 hours after activation before beginning invoice testing.

Test Invoice Readiness

Collect representative invoices from major suppliers.

Recommended minimum:

- 20 invoices from each major supplier
- Top 10–20 suppliers
- Multiple invoice layouts where available

Include:

- Matched invoices
- Unmatched invoices
- Service invoices
- Utility invoices
- multipage invoices

- Regional invoice variants
- Invoices that meet Invoice Completion policy conditions
- Invoices that don't meet Invoice Completion policy conditions
- Invoices that trigger each configured anomaly control
- Invoices that shouldn't trigger configured anomaly controls
- Multiple incomplete invoices with the same fingerprint for bulk-reprocessing validation

Invoice Completion rules should be tested in a controlled environment before wider rollout. Policies populate a target attribute only when the field is blank and apply during invoice import.

Recommended Testing Strategy

Pilot testing is recommended for most organizations, while enterprise testing can be used when invoice processes are highly standardized and supplier populations are well understood.

Pilot Testing

Pilot testing is recommended for most organizations.

Typical pilot scope:

- Limited supplier population
- Limited user population
- One or more business units
- Controlled operational monitoring

Pilot testing enables organizations to:

- Validate configuration.
- Establish recognition baselines.
- Refine training activities.
- Validate Invoice Completion policies with a limited invoice population.
- Tune anomaly-control criteria and reduce false positives.
- Confirm that bulk learning affects only applicable invoices.
- Gather user feedback.

Enterprise Testing

Enterprise testing is appropriate when:

- Invoice processes are highly standardized
- Supplier populations are well understood
- Significant adaptive learning already exists

Enterprise testing should still include representative invoice samples from major suppliers. Invoice Completion and anomaly controls shouldn't be deployed broadly until their results have been validated using controlled test populations.

Test Matrix

Use this matrix to validate Payables Agent configuration before pilot or production rollout.

Test with representative supplier invoices, including matched invoices, unmatched invoices, service invoices, utility invoices, multipage invoices, and regional invoice variants.

Test area	Objective	Test activities	Expected result
Invoice submission	Verify invoices are received and ingested.	Submit invoices through the configured submission channel. Verify email forwarding and review the documents in Invoice Document Streams .	Documents appear in Streams , file names display correctly, stream classification is correct, and processing begins successfully.
Invoice recognition	Validate extraction of invoice attributes.	Review header attributes such as supplier, supplier site, invoice number, invoice date, invoice amount, currency, Business Unit, payment terms, and requester. Review line attributes such as description, quantity, unit price, line amount, purchase order number, and ship-to location.	Required attributes are populated, suppliers are identified correctly, invoice totals are accurate, and purchase orders are identified correctly.
Business Unit derivation	Validate Business Unit assignment logic.	Submit invoices for each configured derivation method, such as purchase-order-based derivation, supplier-site derivation, sender email derivation, recipient email derivation, or routing-attribute derivation.	Business Units are assigned correctly, routing acts as expected, and no manual Business Unit correction is required.
Invoice creation	Validate invoice creation behavior.	Process complete invoices, incomplete invoices, matched invoices, unmatched invoices, service invoices, and utility invoices.	Invoice status is correct, invoice lines are created correctly, and tax and freight handling behave as configured.
Exception handling	Validate invoice exception management.	Create scenarios with missing supplier information, missing invoice numbers, invalid purchase orders, missing required attributes, Business Unit derivation issues, and policy violations.	Exceptions and policy violations are visible, routing occurs correctly, users can access assigned invoices, and corrective actions can be performed.
Invoice correction	Validate correction workflows.	Correct invoice numbers, suppliers, purchase orders, dates, invoice amounts, and line information.	Corrections are saved, invoice status updates correctly, and processing continues successfully.
Adaptive learning	Validate learning behavior.	Process an invoice with recognition errors, correct the invoice, save the correction, and submit another invoice with the same layout.	Corrections are retained, recognition improves, and manual intervention decreases for future invoices with the same layout.

Test area	Objective	Test activities	Expected result
Bulk learning and reprocessing	Validate propagation of applicable learning.	Prepare multiple incomplete invoices with the same fingerprint. Correct one invoice in Invoice Document Training or the Edit Invoice page and review the remaining invoices.	The correction is stored against the fingerprint and applied only to other incomplete invoices where the application determines that it is applicable. Unrelated invoices aren't changed.
Invoice Document Training	Validate onboarding of new invoice layouts.	Upload representative invoice samples, review extracted attributes, correct recognition issues, and save training results.	Training completes successfully, fingerprints are generated, and future invoices benefit from training.
Invoice Completion	Validate policy-based attribute defaulting.	Import invoices that meet and don't meet each policy condition. Test invoices where the target field is blank and where it already contains a value.	The target attribute is populated only when the policy condition is met and the target is blank. Existing values aren't overridden.
Invoice Completion prerequisites	Validate required source-and-target dependencies.	Test policies for Distribution Set, Project, Expenditure Type, Project Organization, Distribution Account, and Global Descriptive Flexfields using the required source attributes.	Policies execute only when required source attributes are available and generate valid target values.
Anomaly controls	Validate anomaly identification.	Submit invoices that trigger configured currency, remittance-bank-account, high-amount, fraudulent-invoice, or duplicate-invoice criteria. Also submit invoices that fall within normal criteria.	Invoices meeting configured criteria are marked for review. Invoices outside the criteria continue without being marked as an anomaly.
Invoice Document Streams	Validate operational visibility.	Search documents, filter results, review processing status, and verify statuses such as Processing , Pending Review , Pending Approval , Completed , and Invalid File .	Users can monitor inbound documents, identify processing status, and locate documents requiring attention.
Invoice List	Validate exception-management functionality.	Search and filter invoices, review invoice details, policy violations, anomalies, and rejected invoices.	Users can manage invoice exceptions from Invoice List and see only invoices for authorized Business Units.
Routing rules	Validate incomplete-invoice routing.	Generate invoices that require manual review and confirm workflow behavior.	Workflow notifications are generated, the correct users receive assignments, and assigned users can access the invoices.
Reporting	Validate tracking and recognition reporting.	Run the Invoice Documents Recognition Tracking Report and the Invoice Documents Recognition Rate Report .	Submitted invoices appear in reporting, processing status is accurate, import status is correct, and recognition rates can be reviewed.
Home page	Validate Home page inquiry and prompt behavior.	Submit a free-form question and each predefined prompt with complete and partial parameters.	The Agent returns the appropriate invoice population and opens the related chat-and-canvas context.

Test area	Objective	Test activities	Expected result
Top Insights	Validate Top Insights navigation.	Open an insight from the Home page and select View All .	The user reaches the insight detail or full Insights experience permitted by security.
Insight lifecycle	Validate insight lifecycle actions.	Mark an insight reviewed, dismiss it, and reopen it.	Status and comments are retained, and the enabled action is reflected in the Insights page.
Monitoring prompts	Validate monitoring prompt management.	Review, enable, disable, and clone a predefined prompt using an authorized user.	Only supported execution settings are editable; predefined conditions remain read-only.
Instruction documents	Validate instruction-document extraction and review.	Upload a Word, text, or PDF instruction document.	Instructions are extracted for review and can be edited before application.
Annotation learning	Validate annotation-based learning.	Correct a PDF or image invoice through annotation.	The corrected value is saved and reused for an applicable document fingerprint.
Invoice List query	Validate natural-language invoice queries.	Enter a natural-language invoice request.	The canvas displays authorized records that match the request.
Invoice actions	Validate invoice and exception actions.	Validate or cancel a test invoice and override a test anomaly or release a test hold.	The action follows security and state rules and is recorded in the audit trail.
Capture endpoints	Validate endpoint visibility and stream actions.	Open Document Receiving Endpoints and review the required supplier-invoice and payment-request endpoints. Open the Invoice Image Documents stream and review the available stream actions.	Required supplier-invoice and payment-request endpoints and stream-specific actions are available.

Bulk learning stores corrections against the document fingerprint and propagates them only to applicable invoices with the same fingerprint, including incomplete Payables invoices. Invoice Completion policies apply during import, don't override populated fields, and require defined source-target dependencies for specific attributes.

Recognition Accuracy Monitoring and Improvement

During testing, review recognition accuracy for high-volume suppliers, frequently used invoice layouts, and invoices that require repeated manual correction.

Focus on attributes that directly affect invoice creation, routing, matching, and exception handling.

Review area	What to monitor	How to improve
Supplier recognition	Supplier name, supplier site, supplier address, and duplicate or ambiguous supplier records.	Review supplier master data, correct supplier/site details, and remove avoidable ambiguity where possible.

Review area	What to monitor	How to improve
Purchase order recognition	Purchase order number recognition, PO format consistency, and PO matching behavior.	Review PO number formats and supplier invoice presentation. Alphanumeric and distinctive PO formats generally improve recognition.
Business Unit derivation	Business Unit assignment for matched invoices, unmatched invoices, sender email mapping, recipient email mapping, and routing attributes.	Correct Business Unit derivation setup, email mappings, or routing attribute usage.
Header attributes	Invoice number, invoice date, invoice amount, currency, payment terms, legal entity, and requester.	Correct recognition errors and save learning where supported. Review requester domain setup if requester recognition fails.
Line attributes	Description, quantity, unit price, line amount, purchase order number, and ship-to location.	Review line recognition options, service order settings, utility supplier settings, and adaptive learning results.
Invoice image quality	Blurred scans, skewed images, incorrect orientation, low contrast, cropped pages, or unsupported files.	Correct scanner settings, enforce file submission standards, and retest with cleaner invoice samples.
Training coverage	Suppliers or layouts with repeated recognition issues.	Use Invoice Document Training for high-volume suppliers, recurring layouts, and suppliers with high exception volumes.
Adaptive learning	Whether corrections are reused for future invoices with the same layout.	Confirm corrections are saved, fingerprints are generated, and later invoices show improved recognition.
Bulk reprocessing	Whether applicable incomplete invoices with the same fingerprint receive the saved correction.	Verify the invoices share the same fingerprint and that the correction is applicable. Review any invoices that remain unchanged individually.
Reporting trends	Suppliers with low recognition rates, recurring exception patterns, and attributes with frequent corrections.	Use recognition reports to prioritize supplier training, supplier data cleanup, or configuration changes.

Use the **Invoice Documents Recognition Tracking Report** to review invoice-processing progress and import outcomes. Use the **Invoice Documents Recognition Rate Report** to identify suppliers, layouts, and attributes that need additional review or training. After corrections, training, or configuration updates are completed, process additional invoices from the same supplier or layout and confirm that recognition accuracy improves.

User Acceptance Testing

Before production rollout, conduct User Acceptance Testing with Accounts Payable Specialists, Accounts Payable Supervisors, Shared Services teams, Business Process Owners, and authorized Compliance & Control users.

User Acceptance Testing should confirm that users can:

- Complete end-to-end invoice processing.
- Manage invoice exceptions.
- Use **Invoice Document Streams** and **Invoice List**.
- Perform assigned correction activities.
- Review operational reporting.

- Create or review Invoice Completion policies according to their assigned access.
- Confirm that policies default the correct values without overriding existing data.
- Review anomalies and policy violations.
- Correct an incomplete invoice and verify applicable bulk reprocessing.
- Confirm that users without Compliance & Control access can't modify policies or controls.

8 Rollout Recommendations

Rollout Approach

Successful Payables Agent adoption requires structured deployment, focused user enablement, supplier readiness, operational monitoring, and continuous recognition improvement.

Use a phased rollout approach to validate configuration, reduce operational risk, and expand adoption after pilot results are stable.

Phase	Scope	Key activities	Expected outcome
Configuration and validation	Implementation team and test users	Configure Payables Agent, configure security, configure invoice submission channels, configure routing, validate invoice processing, and complete testing. Configure and validate Invoice Completion policies and anomaly controls, if applicable.	A technically validated solution that is ready for controlled operational use.
Pilot deployment	Selected Accounts Payable users, one or more Business Units, and a limited supplier population	Process representative invoices, monitor recognition results, review exception volumes, validate correction workflows, and collect user feedback. Validate selected Invoice Completion policies, anomaly controls, and bulk reprocessing using a controlled invoice population.	Payables Agent is validated with a controlled operational population before broader deployment.
Expanded adoption	Additional suppliers, users, and Business Units	Add suppliers incrementally, expand user access, continue invoice training, review recognition reports, and adjust configuration where required. Expand validated policies and controls only after pilot results are acceptable.	Adoption expands while configuration, recognition, control, and support processes continue to stabilize.
Enterprise deployment	Full production population	Establish Payables Agent as the primary invoice-ingestion and processing mechanism, continue monitoring, and manage ongoing optimization. Periodically review Invoice Completion policies, anomaly-control criteria, and bulk-learning outcomes.	Payables Agent is operationalized across the intended production scope with ongoing monitoring and improvement.

Pilot Scope Recommendations

Use these recommendations to define a controlled Payables Agent pilot scope.

Pilot area	Recommendation	Reason
Suppliers	Start with high-volume suppliers that submit recurring invoice formats.	High-volume suppliers provide more learning opportunities and faster automation gains.
Invoice types	Include matched, unmatched, service, utility, multipage, and regional invoice variants.	Representative invoice coverage validates recognition behavior across real operational scenarios.
Users	Start with experienced Accounts Payable Specialists, Accounts Payable Supervisors, and administrators. Include authorized users who configure or review Compliance & Control capabilities when those capabilities are in scope.	Experienced users can identify issues, provide useful feedback, and support training and policy-validation activities.
Business Units	Start with one or more Business Units with clear ownership and manageable invoice volume.	Controlled scope reduces risk and makes issue resolution easier.
Invoice Completion	Start with a limited number of policies and include invoices that meet and don't meet the policy conditions.	Controlled testing verifies that the correct target attributes are populated and that existing values aren't overridden.
Anomaly controls	Start with selected anomaly patterns and include both normal and anomalous invoice scenarios.	Limited initial scope supports threshold refinement and reduces false positives.
Bulk learning	Include multiple incomplete invoices with the same fingerprint.	This verifies that saved corrections are applied only to other invoices where the learning is applicable.
Feedback	Establish a clear feedback channel for recognition, routing, supplier prediction, access, policy, control, and user-experience issues.	Early feedback helps refine setup before expanded adoption.

Anomaly controls should be introduced selectively and tuned before broader deployment rather than enabling all anomaly types simultaneously. Bulk learning applies corrections to other invoices with the same fingerprint only when the application determines that the learning is applicable.

User and Supplier Enablement

Prepare users and suppliers for rollout through training, support procedures, submission guidance, and ongoing communication.

Area	Enablement activity
User training	Train users on Invoice Document Streams , Invoice Document Training , Invoice List , invoice-correction workflows, and adaptive-learning concepts. Focus training on operational workflows rather than technical architecture.
Adaptive learning	Explain why corrections matter, how learning is captured, how future invoices improve, and why consistent corrections are important.
Bulk learning and reprocessing	Explain that a saved correction may be applied to applicable incomplete invoices with the same fingerprint. Clarify that unrelated invoices or inapplicable corrections aren't updated.

Area	Enablement activity
Exception management	Train users to review incomplete invoices, correct invoice attributes, use Invoice List filters, use correction spreadsheets, and monitor exceptions.
Invoice Completion	Explain that policies apply during invoice import, populate only blank target attributes, and don't override existing values. Train authorized users on policy review and change-control procedures.
Anomaly and policy-violation review	Train users to identify, review, correct, override, or revalidate invoices that are marked by configured controls.
Support procedures	Define who supports users, how issues are escalated, who performs training activities, and who owns recognition performance, policies, and controls.
Supplier communication	Provide approved invoice-submission addresses, submission instructions, supported file formats, and support contact information.
Digital invoice preference	Encourage suppliers to submit native digital documents where possible because they typically produce better recognition outcomes than scanned images.
Layout changes	Monitor supplier-layout changes and retrain when recurring recognition issues appear.

Operational Governance

Define clear ownership for Payables Agent configuration, security, training, monitoring, policies, controls, and continuous improvement.

Area	Recommended owner	Responsibility
Configuration	Payables Administrator	Maintain Payables Agent setup, invoice-submission channels, routing rules, and configuration changes.
Security	Security Administrator	Maintain privileges, roles, permission groups, and Business Unit data access.
Training	Accounts Payable Operations Team	Manage layout onboarding, training review, learning validation, and training quality control.
Recognition monitoring	Accounts Payable Supervisor	Review recognition metrics, exception trends, supplier performance, and correction volumes.
Reporting	Accounts Payable Operations Team	Run and review recognition-tracking and recognition-rate reports.
Invoice Completion policies	Authorized Payables Administrator or Business Process Owner	Define, test, approve, maintain, and retire Invoice Completion policies. Ensure each policy has a clear business purpose and supported source-and-target attributes.
Anomaly controls	Authorized Control Owner or Business Process Owner	Select anomaly patterns, define criteria, review false positives, approve changes, and periodically reassess thresholds and historical periods.

Area	Recommended owner	Responsibility
Bulk learning review	Accounts Payable Operations Team	Confirm that propagated corrections affect only applicable invoices and investigate invoices that still require manual correction.
Continuous improvement	Process Owner	Prioritize improvement actions and coordinate supplier, master-data, training, policy, control, and process changes.

Compliance & Control supports Invoice Completion and anomaly detection through natural-language policy configuration and should be governed through restricted access and controlled change procedures.

Compliance and Control Policy Governance

Use the following practices when governing Compliance and Control policies:

- Upload clear, current, and approved policy documents.
- State business conditions, exceptions, and required outcomes explicitly in the policy document.
- Include the specific values required for Policy Details, such as account combinations, tax determinants, project attributes, or control thresholds.
- Review generated Policies and Policy Details before activating them.
- Keep policy documents aligned with current business processes and regulatory requirements.
- Use Invoice Completion policies to derive missing invoice attributes.
- Use Control policies to identify anomalies and validate invoices against purchase orders or receipts.
- Define clear ownership for reviewing invoices marked by Control policies.
- Update or replace policies when business rules, organizational structures, or compliance requirements change.

Avoid the following practices:

- Don't upload draft, outdated, conflicting, or unapproved policy documents.
- Don't rely on implied business knowledge. Document the intended condition and outcome explicitly.
- Don't use ambiguous terms such as "high value," "appropriate account," or "when necessary" without defining the applicable criteria or values.
- Don't activate generated rules without confirming that the generated logic reflects the intended policy.
- Don't introduce rules that conflict with existing accounting, tax, procurement, or approval requirements.
- Don't assume a policy applies only to selected invoices unless its conditions explicitly limit the scope.
- Don't ignore invoices marked by Control policies. Investigate and resolve exceptions according to the organization's review process.
- Don't leave inactive, duplicate, or superseded policies in place without appropriate governance.

Operational Monitoring and Recognition Improvement

This topic describes how to monitor Payables Agent operations and recognition performance.

Payables Agent is a continuously improving capability, not a one-time implementation. Maintain supplier onboarding, recognition monitoring, operational governance, ongoing training, and periodic reviews of Invoice Completion policies and anomaly controls. Refine anomaly criteria when transaction patterns change or recurring false positives appear.

Review area	During pilot	After stabilization	Action
Invoice Document Streams	Review weekly.	Review monthly or as part of operational monitoring.	Monitor processing status, invalid files, pending-review documents, and approval status.
Invoice List	Review weekly.	Review monthly or as part of exception management.	Monitor rejected invoices, policy violations, exception trends, and correction volumes.
Recognition reports	Review weekly.	Review monthly.	Review recognition trends, supplier performance, training opportunities, and recurring correction patterns.
High-volume suppliers	Review weekly.	Review monthly or when supplier layouts change.	Prioritize training and supplier-master-data cleanup for suppliers with high invoice volume or high exception rates.
Supplier master data	Review during pilot and when supplier-recognition issues occur.	Review periodically.	Review supplier names, addresses, supplier sites, and duplicate or ambiguous supplier records.
Purchase order formats	Review when purchase-order recognition or matching issues occur.	Review when purchase-order numbering standards change.	Use distinctive and consistent purchase-order formats where possible.
Adaptive learning	Review after corrections and training.	Review when recognition doesn't improve.	Confirm corrections are saved, fingerprints are reused, and future invoices benefit from learning.
Bulk learning and reprocessing	Review after corrections to invoices that share a fingerprint.	Review when repeated corrections continue for the same layout.	Confirm that applicable incomplete invoices were reprocessed correctly and that unrelated invoices weren't modified.
Invoice Completion	Review each policy during pilot.	Review after policy changes and periodically according to governance requirements.	Confirm that policies populate the expected target values only when conditions are met and target fields are blank.
Anomaly controls	Review marked and unmarked test populations during pilot.	Review periodically and when transaction patterns change.	Monitor anomaly volumes, false positives, overrides, and control effectiveness. Adjust criteria where required.

Recognition Improvement Workflow

Use the following process to continuously improve recognition performance.

1. Run the **Invoice Documents Recognition Rate Report**.
2. Identify suppliers with low recognition rates, high exception volumes, or frequent manual corrections.

3. Review invoice layouts for variability, missing attributes, or inconsistent structures.
4. Perform **Invoice Document Training** for suppliers and layouts that require learning.
5. Review supplier master data and purchase order formats.
6. Correct representative invoices and save the corrections.
7. Confirm that applicable incomplete invoices with the same fingerprint were reprocessed correctly.
8. Monitor the subsequent **Recognition Rate Report**.
9. Repeat this process as new suppliers, layouts, or business requirements are introduced.

Adoption Success Measurements

Each organization should define targets based on its invoice volume, supplier profile, operating model, and rollout goals.

Measurement area	Example measures
Operational performance	Recognition rate, invoice-automation rate, exception rate, invoice-processing volume, average correction volume, and policy-violation volume.
Efficiency	Reduction in manual entry, reduction in invoice-review effort, reduction in repeated corrections, reduction in manual attribute population, and reduction in processing cycle time.
Quality	Supplier-recognition accuracy, invoice-attribute recognition accuracy, Business Unit derivation accuracy, Invoice Completion accuracy, bulk-reprocessing accuracy, and anomaly false-positive rate.
Controls	Number of marked invoices, percentage of marked invoices requiring corrective action, override frequency, and recurring control exceptions.
User adoption	Active users, training participation, user feedback, exception-resolution time, and support-request volume.

Production Readiness Review

Verify configuration, security, operations, recognition, learning, policies, reporting, and governance before production rollout.

Readiness area	Verify
Configuration	Payables Agent configuration is complete, routing is functioning, invoice-submission channels are stable, and applicable Invoice Completion policies and anomaly controls are configured.
Security	User access, permission groups, Business Unit data security, and Compliance & Control access are validated.
Operations	Users can perform required activities, support procedures are documented, and operational ownership is assigned.
Recognition	Recognition rates are acceptable for rollout, high-volume suppliers are tested, and major recognition issues are addressed.

Readiness area	Verify
Learning	Adaptive learning is validated, and bulk reprocessing has been tested using applicable incomplete invoices with the same fingerprint.
Policies and controls	Invoice Completion policies produce expected results, anomaly controls are tuned, false positives are reviewed, and policy and control owners have approved production use.
Reporting	Recognition-tracking and recognition-rate reports are reviewed and used for operational monitoring.
Governance	Monitoring procedures are established, controlled change procedures are defined, and continuous-improvement ownership is assigned.

9 Troubleshooting and Tips

When Is Troubleshooting Required?

Even with careful preparation and testing, organizations may experience issues during implementation or operational use of Payables Agent.

Most issues are related to invoice submission, supplier and purchase order data, Business Unit derivation, requester setup, recognition accuracy, file quality, adaptive learning, training, policy configuration, or security access.

Use the following tables to identify symptoms, check likely causes, and apply corrective actions.

Invoice Submission and File Processing Issues

Use this table to troubleshoot invoice submission and file-processing issues in Payables Agent.

Issue	What to check	Corrective action
Invoice doesn't appear in Invoice Document Streams	Confirm that the supplier sent the invoice to the correct mailbox, email forwarding is working, and the Payables Agent endpoint received the message.	Correct mailbox forwarding rules, resend the invoice, and verify that the document appears in Invoice Document Streams .
Invoice shows Invalid File status	Check whether the file format is supported, the file opens correctly, the file isn't password protected, and the file's data integrity isn't damaged.	Resubmit the invoice in a supported format such as PDF, TIFF, TIF, PNG, DOC, DOCX, JPG, or JPEG.
Processing is delayed	Check whether the file is large, contains unnecessary pages, or includes noninvoice content.	Remove unnecessary content and resubmit only the invoice and required supporting documents.
Multiple invoices are processed incorrectly	Check whether multiple invoices were included in a single attachment without clear separation.	Prefer one invoice per attachment. If multiple invoices are included in one file, separate them with blank pages.
Supporting documents are processed as invoices	Check whether supporting documents were submitted separately or placed before the invoice.	Include supporting documents in the same file as the related invoice and place them after the invoice pages.
Signature images appear as attachments	Check whether the email signature contains embedded logos, icons, or images.	Ask suppliers or internal submitters to remove signature images from invoice-submission emails.
Recognition quality varies for scanned invoices	Check scanner resolution, orientation, contrast, cropping, skew, and page completeness.	Rescan invoices using the scanning and file submission standards defined in Chapter 3.

Recognition and Invoice Data Issues

Use this table to troubleshoot recognition, invoice data, Invoice Completion, and anomaly-control issues.

Issue	What to check	Corrective action
Supplier isn't recognized	Compare supplier name, address, tax-registration details, and supplier-site data with the invoice.	Correct supplier master data and verify that supplier details match invoice content as closely as possible.
Incorrect supplier is recognized	Check for duplicate supplier sites, similar supplier names, identical addresses, or internal suppliers affecting prediction.	Clean supplier data, remove avoidable ambiguity, and review internal-supplier handling.
Supplier site is incorrect	Check whether multiple supplier sites use similar or identical addresses.	Update supplier-site details and avoid maintaining duplicate address patterns where possible.
Purchase order isn't recognized	Check whether the purchase order number is visible on the invoice and whether synchronization has completed.	Verify the purchase order format, wait for synchronization if needed, and retest with invoices that clearly display the purchase order number.
Incorrect purchase order is recognized	Check whether purchase order numbers are numeric-only or easily confused with invoice numbers, dates, or amounts.	Use distinctive purchase order formats where possible, such as alphanumeric formats.
Invoice lines aren't recognized as expected	Check Document Recognition and Processing Options for matched- and unmatched-invoice line recognition.	Update line-recognition options and retest matched, unmatched, service, and utility-invoice scenarios.
Tax or freight isn't handled as expected	Check the tax, freight, and proration options configured for document recognition and invoice import.	Adjust recognition options and validate the resulting invoice lines, tax behavior, and freight handling.
Invoice Completion policy doesn't populate the target attribute	Check whether the invoice was imported, the policy condition was met, the target field was blank, and the required source attributes were available.	Correct the policy condition or source data and test with another imported invoice. Invoice Completion doesn't override an existing target value.
Invoice Completion policy populates an unexpected value	Check the natural-language instruction, the source-and-target combination, and whether more than one policy applies to the target attribute.	Refine the instruction, maintain a separate policy for each target attribute, and retest before broader use.
Invoice Completion policy doesn't apply to a manually created invoice	Check how the invoice was created.	No corrective action is required. Invoice Completion applies during invoice import and doesn't apply to manually created invoices or invoices inserted directly into Payables base tables.
Anomaly control doesn't mark an expected invoice	Check whether the anomaly pattern is enabled and whether the invoice meets the configured historical period, threshold, or comparison criteria.	Enable or refine the control and test it with an invoice that meets the configured criteria.
Too many invoices are marked as anomalies	Check whether the threshold is too broad, the historical period is inappropriate, or	Refine the control criteria and retest with both normal and anomalous invoice populations.

Issue	What to check	Corrective action
	the selected comparison attributes are too inclusive.	
Expected duplicate invoice isn't marked	Check the configured duplicate-invoice criteria and the invoice-number values being compared.	Correct the control criteria and retest using known duplicate examples.
Invoice remains in review after the issue is resolved	Check whether the invoice requires revalidation after a policy violation or anomaly has been reviewed.	Complete the required correction or override and revalidate the invoice.

Invoice Completion applies during import, populates only blank target attributes, and doesn't override existing values. Anomaly patterns must be explicitly enabled and configured before they affect invoice processing.

Business Unit, Requester, and Routing Issues

Use this table to troubleshoot Business Unit derivation, requester recognition, and routing issues.

Issue	What to check	Corrective action
Business Unit isn't assigned	Check the active Business Unit derivation method and whether required supplier site or profile setup exists.	Configure the selected Business Unit derivation method and verify fallback setup such as DEFAULT_ORG_ID.
Incorrect Business Unit is assigned	Check sender email mapping, recipient email mapping, routing attribute values, or supplier site assignment.	Correct the mapping or supplier setup, then submit representative test invoices again.
Invoice is routed to the wrong user or group	Check routing rules, Business Unit assignment, routing attributes, and workflow configuration.	Correct routing conditions and validate with incomplete invoices that require manual review.
Requester isn't populated	Check whether Requester Email Domain Name is configured and whether the requester email appears on the invoice.	Add the required domain and retest with invoices that contain a valid requester email.
Incorrect requester is populated	Check domain order when multiple domains are configured and verify employee work email setup in HCM.	Correct the domain list or employee email setup, then resubmit a representative invoice.
Email-to-Business Unit Mapping option is unavailable	Check whether the selected Business Unit derivation mode uses sender or recipient email address mapping.	Configure the required email-based Business Unit derivation mode, then reopen the Invoice Image Documents stream and maintain the applicable email-to-Business Unit mappings.

Training, Adaptive Learning, and Recognition Rate Issues

Use this table to troubleshoot training, adaptive learning, recognition rates, and enhanced learning.

Issue	What to check	Corrective action
Recognition rates are low	Review supplier-level recognition rates, recurring corrections, exception volumes, and invoice-image quality.	Prioritize high-volume suppliers for training and correct supplier, purchase order, or scanning issues.
Adaptive learning doesn't improve recognition	Check whether corrections were saved and whether later invoices use the same fingerprint or layout.	Save corrections consistently and retest with invoices from the same supplier layout.
Training doesn't improve results	Check whether uploaded samples are complete, clean, and representative of actual supplier layouts.	Upload representative samples, include common layout variations, correct extracted fields, and save training results.
New supplier layouts keep generating exceptions	Check whether the supplier changed invoice formats or uses multiple layout variants.	Perform Invoice Document Training for the new or changed layouts.
Same correction is repeated manually	Check whether the correction is supported for adaptive learning and whether users are correcting values consistently.	Standardize correction practices and confirm that learning is retained for future invoices.
Reports show lower recognition after adding suppliers	Check whether newly added suppliers or layouts have limited learning history.	Review recognition reports by supplier and prioritize training for suppliers with low recognition rates or high volume.
Correction isn't applied to other incomplete invoices with the same layout	Check whether the invoices have the same fingerprint, remain in Incomplete status, and the correction is applicable to them.	Confirm the fingerprint and invoice status. Correct invoices individually when the application determines that the learning isn't applicable.
Correction is expected to apply to an unrelated invoice	Check whether the invoice shares the same fingerprint and whether the corrected attribute is relevant to it.	No corrective action is required when the fingerprint differs or the correction isn't applicable. Bulk learning doesn't apply corrections indiscriminately.
Uploaded instruction document produces incomplete guidance	Review the extracted instructions for missing mappings, conditions, transformations, or target values.	Edit the extracted instructions before applying them. Add the missing conditions or transformations and review the updated result.
Preview UI doesn't show the expected change	Check whether the instruction was applied, the required source data is present, and the target attribute is supported.	Correct the instruction or source data, apply the instruction again, and confirm the result in Preview before saving the learning.

Bulk learning stores corrections against the document fingerprint and applies them to other incomplete invoices with the same fingerprint only when the application determines that the correction is applicable.

Security and Access Issues

Use this table to troubleshoot security and access issues that affect Payables Agent users.

Issue	What to check	Corrective action
User can't access a Payables Agent page	Check assigned privileges, custom roles, permission groups, and role provisioning.	Assign the required access and process permission-group policies.

Issue	What to check	Corrective action
User can access the page but sees no invoice data	Check Business Unit data security for the user and role combination.	Assign Business Unit access and process permission-group policies.
User can't drill down from Invoice Document Streams to Invoice List	Check whether the user has Invoice List access and Business Unit access for the invoice.	Assign the required Invoice List privilege and Business Unit access.
User can't download source documents	Check whether the user has the source-document download privilege and access to the invoice Business Unit.	Assign source-document access only to users who require it.
User can't open the Correction Spreadsheet	Check whether the user has the correction-spreadsheet privilege and access to the invoice Business Unit.	Assign correction access to users responsible for rejected-invoice correction.
Recent security changes don't take effect	Check whether permission-group policies were processed after the change.	Process permission-group policies and retest with the affected user account.
User can't access Compliance & Control	Check whether the user has the Manage Payables Compliance and Control or View Payables Compliance and Control privilege.	Assign the appropriate privilege based on whether the user must manage or only review policies and controls.
User can view policies but can't modify them	Check whether the user has only the view privilege.	Assign Manage Payables Compliance and Control only when the user is authorized to create or modify policies and controls.

The **Compliance & Control** experience requires the applicable manage or view privilege.

Payables Agent Home and Insights Issues

Use this table to troubleshoot Payables Agent Home and Insights availability and access issues.

Issue	What to check	Corrective action
Payables Agent Home , suggested prompts, or Top Insights are unavailable	Check the Payables Invoice Processing duty, the Insights duty, feature enablement, and access to the related Payables pages.	Assign the required duties and downstream Payables access. Process permission group policies and sign in again.
No insights are displayed	Check whether the applicable monitoring prompts are enabled, assigned, and scheduled. Confirm that the user has Business Unit data access and that the monitored condition has occurred.	Enable and assign the applicable monitoring prompts, verify the schedule, and grant access to the required Business Units.
An insight cannot be acted on	Check the current invoice state and the user's access to the related invoice or configuration page. The condition may have changed after the insight was generated.	Review the current transaction state. Assign the required downstream access or take the applicable action from the current invoice or configuration page.

Conversational Invoice List Issues

Use this table to troubleshoot Conversational Invoice List access and action issues.

Issue	What to check	Corrective action
Invoice List canvas is empty	Check whether the user entered a natural-language invoice request and has access to the applicable Business Units.	Enter a request to populate the canvas. Grant the required Business Unit data access and process permission group policies when no authorized records are returned.
An invoice or exception action is unavailable	Check whether the user has Manage Payables Invoice List Activities access, whether the invoice is in a state that supports the action, and whether the action applies at invoice or individual-exception level.	Assign the required privilege, select an eligible invoice or exception, and perform anomaly overrides or hold releases individually from the applicable drawer tab.

Operational Best Practices

Follow these operational best practices to reduce recurring Payables Agent issues.

Area	Best practice
Invoice submission	Use corporate email aliases and maintain forwarding rules to the Payables Agent endpoint.
Supplier communication	Provide suppliers with clear file-format, attachment, and invoice-submission standards.
Supplier master data	Keep supplier names, addresses, sites, and tax-registration information aligned with invoice content.
Purchase orders	Use consistent and distinctive purchase order numbering formats where possible.
Business Unit derivation	Select one derivation strategy and validate it with representative invoices before rollout.
Training	Focus training on high-volume suppliers, recurring layouts, and suppliers with high exception volume.
Adaptive learning	Ensure users save corrections consistently so learning can be reused.
Bulk learning and reprocessing	Review affected invoices to confirm that corrections were applied only where appropriate.
Invoice Completion	Use one target attribute per policy and test policies with matching and nonmatching invoices.
Anomaly controls	Begin with selected controls, tune their criteria, and review false positives regularly.
Reporting	Review recognition reports regularly to identify recurring supplier, attribute, and layout issues.
Security	Validate both page access and Business Unit data access using actual user accounts.
Scanning	Standardize scanner settings before expanding rollout to additional teams or suppliers.