

Not a dashboard. A close that runs itself.

FinanceX unifies every ERP you run — Oracle, SAP, Dynamics — into one live picture, then runs the close on it: a team of specialist AI agents reconciles the ledgers, drafts the journal entry with its supporting evidence, and surfaces every variance in dollars — ready for your sign-off. It doesn't wait to be asked, and nothing posts to the ledger until a controller says yes.

WHAT AGENTIC FINANCE OPERATIONS DELIVER

30–40%

lower DSO with AI-assisted collections & prioritization

60%+

of reconciliations matched straight-through — exceptions first

days → hours

faster close when the exceptions come to you

24/7

every ERP watched — the issue finds you

Directional outcomes from published finance-automation & AI-in-finance studies (Hackett Group, APQC, Gartner, Deloitte) — your ERPs and controls determine actuals.

What makes it different

Reasoning, not scripting.

Give it an outcome — “close the books” — not a macro. It plans the path, correlates across ledgers, drafts the entry, and recovers from the exception. Work, not words.

Wired into your books.

Every figure is read live from your ERPs and banks — computed, never guessed — and grounded in your own accounting policy, controls, and GAAP, not a vendor rule library.

Coordinated, not freelancing.

Bounded specialists — collections, treasury, tax — run under one reasoning core. Each prepares the decision and files it for sign-off; nothing posts until a person says yes.

Across every step of the close

01 Consolidate

3-ERP consolidation

Aging buckets

DSO / DPO

Currency normalization

Per-entity roll-up

02 Reconcile & investigate

Cross-ERP matching

Duplicate detection

Counterparty normalization

Ask-anything Q&A

03 Collections

90+ prioritization

360° debtor summary

Dunning drafts

Promise-to-pay

DSO watch

04 Tax & controls

Trial-balance review

Issue detection

Proposed fixes

Apply & clear

Audit trail

05 Treasury & liquidity

Cash by entity/bank

Idle-cash sweep

FX exposure

Same-currency only

Cash outlook

06 Close & report

Month-end pack

Board narrative

KPI tiles

Export to deck

Every number sourced

THE OPERATING MODEL

You own the sign-off. The agents run the close.

Set the policy and the controls; a reasoning core reads every ERP, correlates the ledgers, and routes each \$-quantified issue to the specialist who owns it — which prepares a decision that's ready to approve, and posts nothing until a person says yes. It runs inside your perimeter; your books never leave.

YOUR SYSTEMS

Oracle · SAP · Dynamics

your ERPs & GL

AR / AP sub-ledgers

receivables & payables

Banks & payment rails

balances & statements

Tax & trial balance

close & controls

Data warehouse

Snowflake · BigQuery

FinanceX

Reasoning core

routes every issue

Specialist agents

one per part of the close

Observations

it doesn't wait to be asked

Policy & controls

your accounting policy & GAAP

OPERATORS & TEAM

Command Center

the decision queue

CFO cockpit

the whole picture

Role portals

controller · treasury · collections

Ask anything

in plain English



NO CODE · NO ENGINEERS · NO TICKETS

You build it. You change it. In an afternoon.

Every piece of that model is yours to shape — stand up a new **role portal**, add a **specialist agent**, define what to **observe**, load a new **policy**, or change a **workflow** — all in the admin console, no code and no waiting on a release. Wiring your ERPs is a fast implementation, not a rebuild.

THE GOVERNING PHILOSOPHY

It recommends. You approve. Everything's on the record.

Automation that posts to the ledger can't be a black box — and in finance, a wrong number is worse than no number. So FinanceX grounds every figure, files each action for sign-off, and lands every decision on an append-only trail.

YOU APPROVE THE DECISION, NOT THE ARITHMETIC

- 1 Grounded, never invented**
 Every figure is computed from your ledgers by real arithmetic — the same inputs always produce the same answer. It will not hallucinate a number.
- 2 Human sign-off on everything**
 It prepares the entry, the sweep, the fix — then files it for a real approve/reject. Nothing posts until a person says yes.
- 3 In your perimeter, fully audited**
 It runs inside your private cloud; your books never leave. Every observation and decision lands on an append-only trail.

DASHBOARD VS. FINANCEX

DASHBOARD / BI	FINANCEX
Shows you the number	✓ Makes the call
You go looking	✓ It tells you first
One ERP at a time	✓ Every ERP, one picture
Alerts, then waits	✓ Acts on your approval
Can hallucinate a figure	✓ Computed — never invented

Same engine as StudioX Core. The same AI Missions, Enterprise Knowledge layer, and 1,300+ integrations that run every StudioX deployment — packaged for finance. Wiring your ERPs is a fast implementation, not a rebuild; the intelligence is already built.