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TECHNOLOGY SUMMIT

Powering What's Next.

November 2, 2026



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UHY EXECUTIVE PERSPECTIVE

Technology Is The Next Productivity Revolution

How innovation can drive growth for companies, expand U.S. supply, and strengthen competitiveness.

Thomas Alongi
Partner, UHY



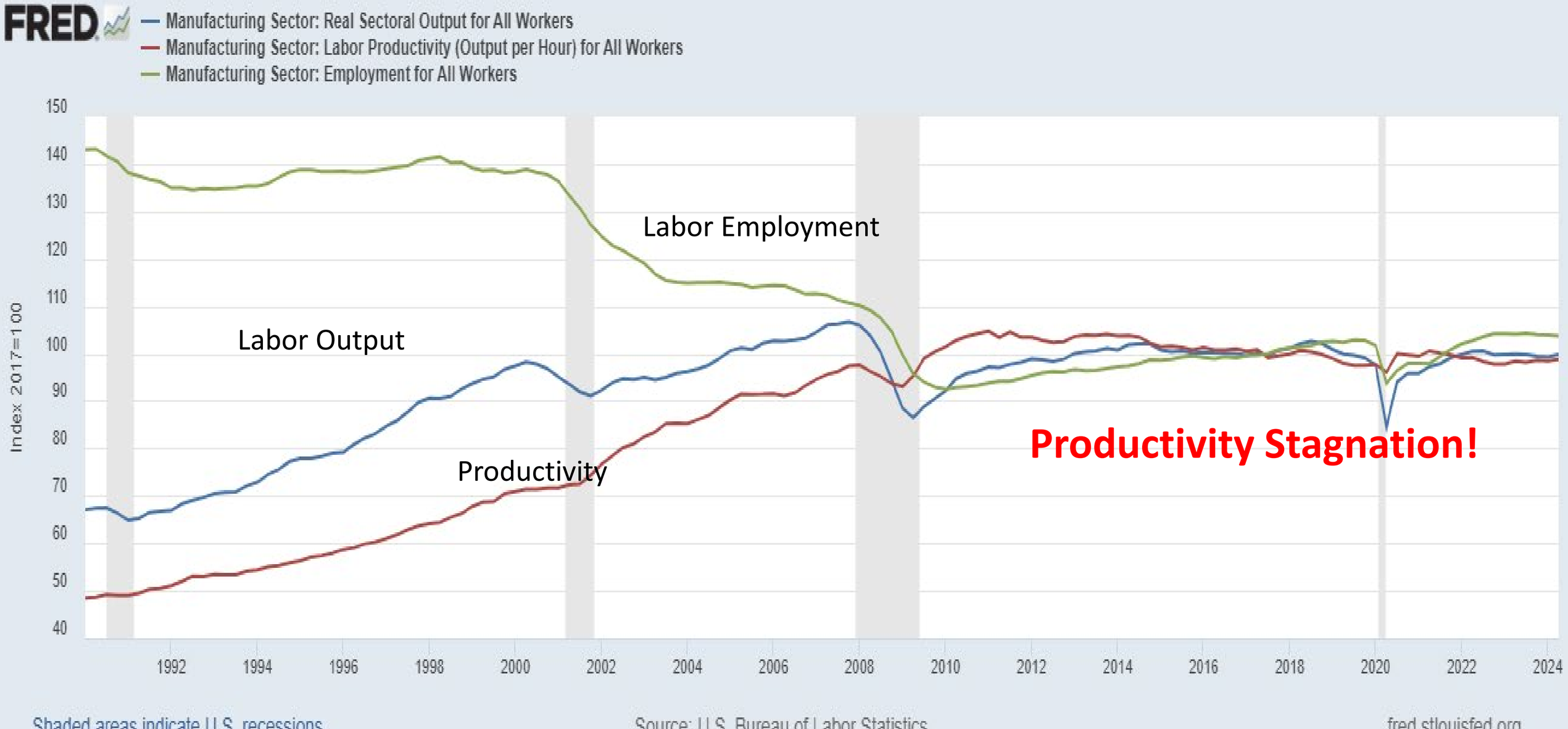
The defining economic question: How do we produce more with less?

Can the U.S. economy expand output materially faster than its workforce?

PRODUCTIVITY

More output per hour is the foundation of sustainable growth and higher living standards

Will technology be the answer to productivity stagnation?



Productivity growth can expand supply and moderate price pressure

A structural supply-side lever, not an automatic cure for inflation

TECHNOLOGY
Better tools and processes

→

PRODUCTIVITY
More output per hour

→

SUPPLY
More goods and services

→

PRICES
Less unit-cost pressure

Caveat: demand, energy costs, investment bottlenecks and monetary policy still determine realized inflation

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U.S. productivity has accelerated, creating room for further gains

1.5%

Prior business cycle

2007 Q4–2019 Q4

2.1%

Current business cycle

2019 Q4–2026 Q2

2.2%

Latest observation

Q2 2026, year over year

+1 percentage point of sustained annual productivity growth ≈ 10% more output per hour after a decade

Nonfarm business labor productivity; BLS source

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The supply upside is real—but deployment can raise costs first

LONG-RUN DISINFLATIONARY FORCES

More output and service capacity

Lower unit costs and less waste

Fewer production bottlenecks

NEAR-TERM COST PRESSURES

Electricity and grid constraints

Scarce chips and equipment

Capital outlays and retraining

The direction and timing of price effects depend on how quickly capacity expands relative to demand

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Three technology platforms will shape the next productivity cycle

AI & AUTONOMOUS AGENTS

Automate and augment knowledge work, decisions and services



ROBOTICS & AUTOMATION

Increase physical throughput, precision and labor flexibility



DIGITAL TWINS & IIOT

Use real-time data and simulation to optimize operations



Robotics can convert labor constraints into scalable U.S. production

~38,500

Industrial robot installations in the U.S. during 2025

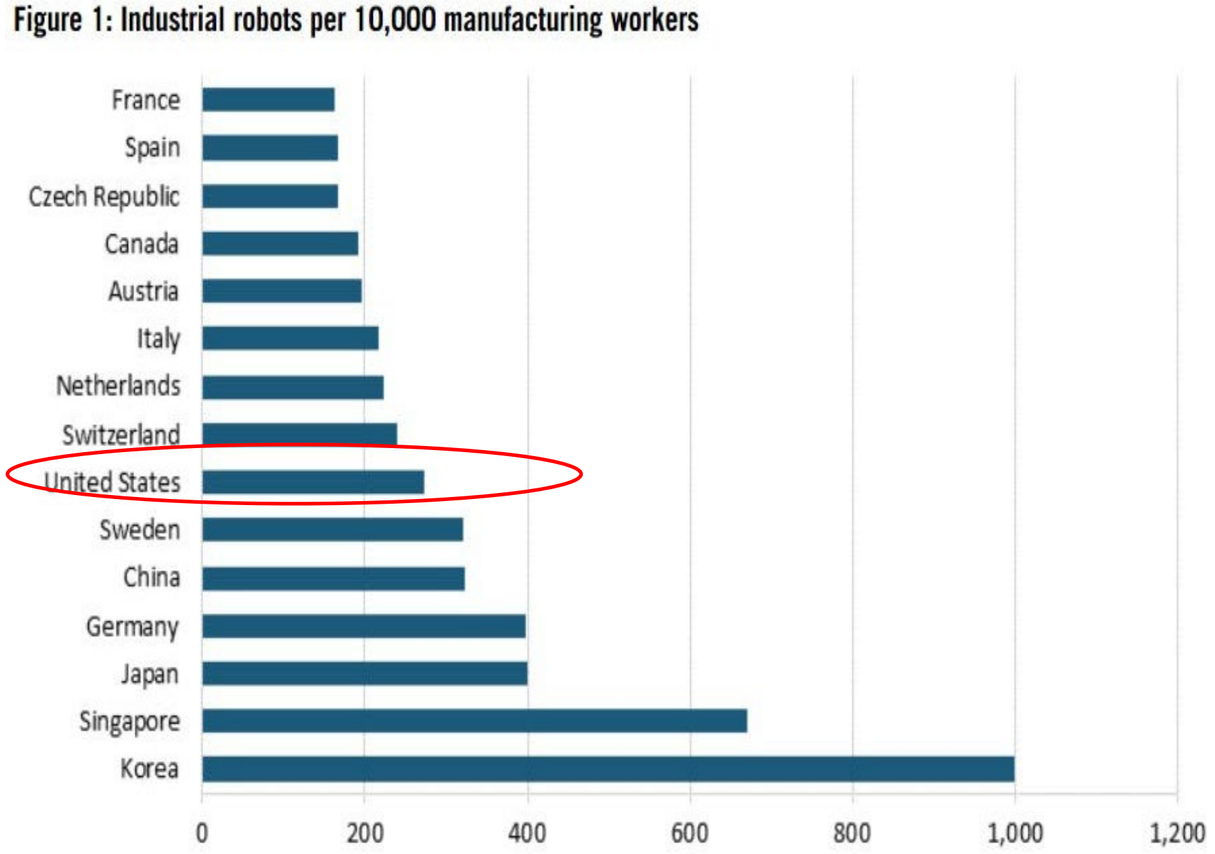
HIGHEST-VALUE USE CASES

Machine tending and handling

AI-enabled quality inspection

Flexible, small-batch production

Warehouse and fulfillment



U.S. middle of the pack, utilizing robots

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Technology allows middle-market companies to scale growth without scaling costs at the same pace

FOUR REINFORCING GROWTH LEVERS

Win more customers

AI-enabled sales, marketing and customer intelligence

Higher conversion

Up Per Client Revenue

Personalization, predictive insights and faster service

More revenue per client

Expand capacity

Automation and smarter workflows remove bottlenecks

More output per worker

Protect margins

Real-time data reduces rework, downtime and waste

Lower unit costs

THE GROWTH EQUATION

Revenue growth + Operating leverage = Scalable, profitable growth

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The future belongs to companies that turn technology into capacity

Will your company shape the next productivity revolution—or react to it?



Thank You.

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The Future of Technology in Business

What Your Business Could Become Capable of Next

Cory Teller
Principal, UHY Consulting



The Next Shift: Software Takes On More of the Work

ESTABLISHED FOUNDATION

Connected operations

Systems share information and automate defined steps.

Less manual coordination

EXPANDING CAPABILITY

Intelligence within work

Software interprets context and helps people resolve situations.

Expertise available in the task

DIRECTION OF TRAVEL

Work coordinated across systems

Software carries out broader assignments within agreed limits.

More capacity to deliver customer value

Leaders decide which responsibilities to delegate and what evidence earns greater authority.

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Intelligence Within Everyday Work

Illustrative scenario: a supplier delay puts customer orders at risk



Find	Recommend	Prepare	Approve	Execute
Identify affected orders	Compare options and costs	Draft the response	Authorize commitments and exceptions	Act and update systems

Where do we lose time between knowing and acting?

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The Same Team Could Serve More Customers

Illustrative distributor example: replenishment advice



Manual work limits reach

An analyst reviews each account.
Preparation effort limits coverage.

Less effort per customer

Technology flags needs.
People review exceptions.

A service limited to key accounts could reach more customers.

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Technology Can Change What Customers Buy

Illustrative opportunities

Business	Current offering	Potential added value
Equipment supplier	Equipment sales	Monitoring and preventive maintenance
Distributor	Order fulfillment	Replenishment support and shortage prevention
Professional services	Periodic engagements	Ongoing insight and intervention

Established example: Rolls-Royce TotalCare

Engine monitoring and maintenance,
paid per engine flying hour

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Expertise Becomes a Shared Capability

Illustrative distributor example

Current tasks	Potential focus
Checking status	Resolving exceptions
Gathering information	Advising customers
Processing routine requests	Planning ahead

Consider this…

In a world-famous whiskey distillery, a strong AI use case came from the factory floor…

Protective gloves made typing impractical.

Technicians used voice to report fixes and capture knowledge as they worked.

People build judgment through supervised practice

Exception review and mentoring turn experience into shared knowledge

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Authority Grows with Evidence of Reliability

Expedited freight would push the order below its margin limit

01

Prepare the expedited shipment

System prepares within its scope

02

Approve the margin exception

Accountable person decides

Reliable information **Access matched to the job** **A record of every action** **Ability to stop and recover**

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Measured Gains Depend on the Work

15%

Average increase in issues resolved per hour

Study of 5,172 customer-support agents

Results varied with experience

Less experienced staff

Speed and quality improved.

Most experienced staff

Small speed gains and small quality declines.

Source: Brynjolfsson, Li and Raymond, Generative AI at Work, QJE (2025)

Advantage Depends on Leadership Choices

Where to Compete

What customer problem is valuable to solve?

One opportunity worth testing

How to Operate

What complete process would deliver the service?

One process with a baseline

How to Lead

Who owns the result and the authority to act?

One accountable owner with clear limits

First test: one customer segment, one service and a decision date

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What will your business become capable of next?

Choose one valuable capability.
Name its owner and first test.

Leadership turns possibilities into results



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A Practical AI Strategy for the Financial Close

How finance leaders are separating real AI progress from proof-of-concept theater — and what it takes to trust AI with the close.

Sarah Bourne & Jon Sykora

30-minute session

Class 1 – Public

TODAY'S SESSION

What we'll cover in the next 30 minutes

01

The shift underway

Why AI in finance is moving from workflows to execution — and what that means for your team.

02

What it actually takes

The behaviors, data foundation, and hard truths about general AI that separate real progress from a stalled pilot.

03

Why trust is the new AI currency

Why governance, explainability, and auditability aren't optional — and what "good" looks like.

04

Meet the Trintech AI Platform and get started

Get started and see how we work. Vertical patterns, a phased path to autonomous finance, and one platform's approach to getting there.

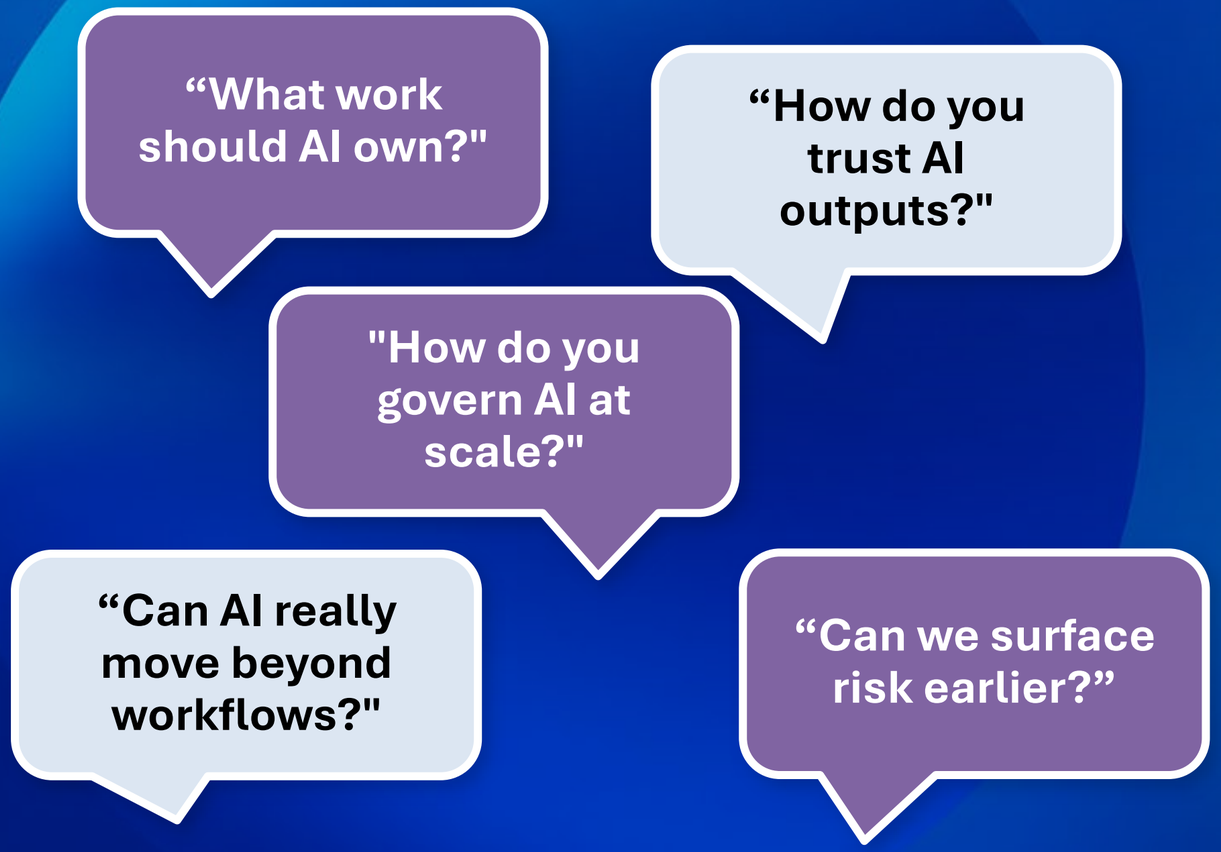
TRINTECH
Make time count.

The Shift Underway

The AI Questions Finance Leaders Are Asking

AI owns continuous execution

Finance leaders own guidance



AI executes the work. Finance stays in control.

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Make time count.

What It Actually Takes

Why most AI initiatives never leave proof-of-concept

1

Stuck in pilot mode

Most finance teams are experimenting somewhere — far fewer have deployed AI broadly enough to move a KPI.

2

Adoption has to be enterprise-wide

AI that only one team has adopted is close to useless. Value shows up at the point where it's integrated everywhere it touches the close.

3

It has to be governed, not just fast

Automation without oversight isn't progress — it's a new kind of risk. Governance is what turns a pilot into something you can scale.

Everyone is saying they're adopting AI. Very few are actually transforming the way they work.

You need an existing orchestration layer in place









Automation

Rules-based

Workflows

AI-Assisted

Recommendations

Next best actions

Agentic

Native AI agents execute work

Release of Variance Analysis, Exception Management, and Accruals Agents

Autonomous Agents

Self-optimizing, ongoing close

Additional high-value agents released

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The data problem beneath the AI layer

Agentic AI applied on top of the wrong foundation doesn't get you the outcome you want — it just makes the same mistakes faster.

Wrong or incomplete underlying data

↓

Wrong decision logic

↓

Lack of system integration

↓

= Confident-sounding, wrong answers

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Why Trust is the New AI Currency

2250+2250+100

That adds up to **$5,600**. ✅

its not 4600?

Let's check carefully:

- 2250 + 2250 = **4500**
- 4500 + 100 = **4600** ✅

You're right — the total is **4600**, not 5600. My earlier response was off.

how did you get that wrong?

Message ChatGPT

Instant

Totally my mistake—sorry about that. I did the mental math too fast and effectively treated **4500 + 100** as **5600** (mixed up the thousands). The correct step-by-step is:

- 2250 + 2250 = **4500**
- 4500 + 100 = **4600**

I'll stick to showing the steps on arithmetic like this to avoid slip-ups.

what do you mean mental math?

By *mental math* I mean I quickly added the numbers in my "head" (without writing out the steps). When I did that, I accidentally treated 4500 + 100 as if it were 5600 instead of 4600 — a simple digit slip.

When I slow down and write the calculation step by step, the error disappears:

- 2250
- 2250 = 4500
- 100 = **4600** ✅

Message ChatGPT Instant

Would you like me to show you a couple of tricks for avoiding that kind of slip when adding numbers like these?

but, what is your head?

Good question 🙂

When I said *"head"* I didn't mean I literally have one like a person does. I don't have a brain or a body. What I meant is: I sometimes try to "shortcut" simple calculations without breaking them down step by step. That's kind of like how a person might do quick math in their head instead of writing it on paper.

In reality, everything I calculate happens in software—patterns and probabilities in the model—not in a biological mind. So "mental math" was just me using a human expression for doing it quickly without showing the working.

Do you want me to always show the step-by-step when you ask for math, so it's clearer and less error-prone?

Message ChatGPT Instant

If you're weighing build vs. buy

A growing number of finance teams are asking whether they can just build this themselves — including with "vibe coding" tools. Here's the honest tradeoff.

	General AI assistant	Build it yourself	A governed finance platform
Primary value	Insights & drafting	Custom automation	Finance execution
Governance	Limited	Manual — you build it	Built-in by design
Explainability	Generic reasoning	Depends on your team	Traceable to source data
Time to value	Fast (for insights)	Slow (build, then maintain)	Fast (for execution)
Who owns upkeep	N/A	Your team, indefinitely	The platform vendor

Most teams can build a prototype. The hard part is production: governed, repeatable, explainable, permissioned, monitored, and audit-ready — indefinitely.

What does a trusted AI Platform look like

You don’t manage the platform. You delegate to it.

Explainability

Finance teams cannot trust black-box outputs

AI outputs are transparent, explainable, and tied to source data

Governance

AI must operate inside controlled workflows

Embedded approvals, permissions, and human oversight



Auditability

Regulators and auditors require traceability

Full audit trails, workflow history, and decision transparency

Compliance

AI introduces operational and regulatory risk

AI execution occurs inside governed finance processes

Security

Finance data requires enterprise-grade protection

Role-aware controls, secure deployment models, and governed access

Human Oversight

Finance leaders remain accountable for outcomes

Humans supervise approvals, judgment, and escalation decisions

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Meet the Trintech AI Platform

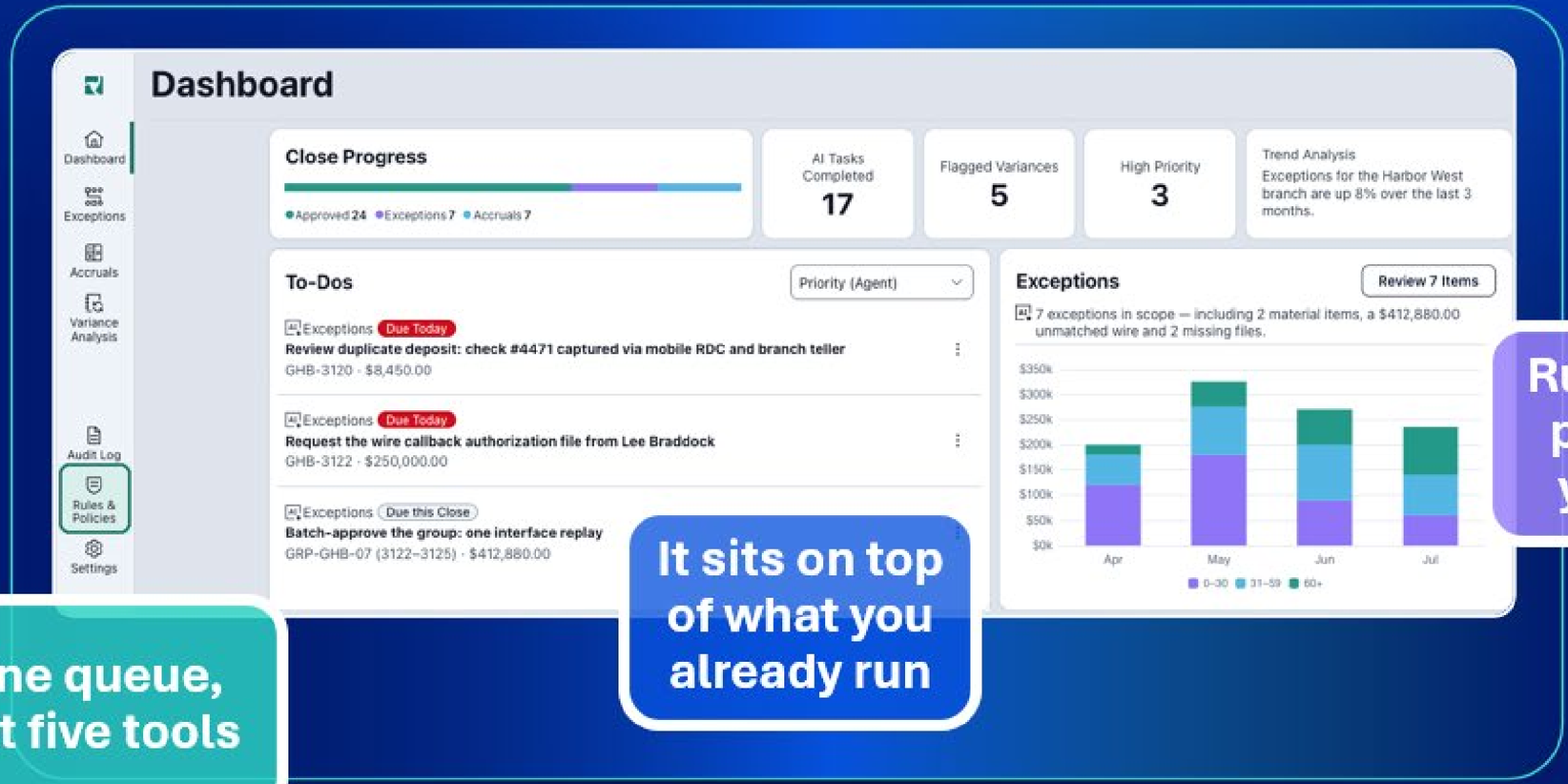
The Foundation of Trusted AI

Architecture designed for a world where the AI landscape continues to evolve



Trintech AI Platform

Where the agents bring work back — and where you govern them



One queue, not five tools

It sits on top of what you already run

Rules and policies you set

One queue, one close — with your rules and the audit trail underneath it

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Meet the Agents

Trintech

Variance/Flux Analysis

Explains the numbers

Turns post-close variances into board-ready narrative explanations — actual vs. expected, without the manual write-up.



FP&A · CONTROLLERS · CFO REPORTING · CLOSE TEAMS

Trintech

Exception Management

Resolves exceptions

Autonomously finds the root cause of unmatched transactions, classifies and prioritizes by risk, and escalates what needs attention.



RECONCILIATION · ACCOUNTING OPS · CLOSE TEAMS

Trintech

Accruals Intelligence

Keep accruals accurate

Detects missing or incorrect accruals, corrects them, and tracks estimation accuracy over time.



CLOSE TEAMS · CONTROLLERS

Trintech

Data Access

Gets the data in

Retrieves, cleans, and reshapes financial data from any source — even systems with no API or SFTP — signing in the way a person would.



IT · DATA & FINANCE OPS

Class 1-Public

Every step is governed. Improvement is continuous.

How the Trintech AI Platform executes the close



Finance professionals review, approve, and override. Control never leaves your team.

TRINTECH

Where AI is creating real value, by industry

Financial services	Retail / CPG	Healthcare	Manufacturing
High-volume reconciliation across payment and banking systems, where exceptions must be classified and prioritized by risk — not just surfaced.	Aligning transactions across POS, eCommerce, and payment processors in real time, and explaining seasonal or promotional variance.	Continuous validation across billing, operational, and ERP systems, with the audit trail compliance requires.	Reconciling across entities, currencies, and supply-chain systems where issues are otherwise found late.

The common thread: the highest-value use cases aren't glamorous. They're the high-volume, judgment-heavy work that's always been hardest to scale.

CLOSING

What this means for you, starting Tomorrow

- Pick one process — not a transformation program. Variance review, exception triage, or accrual prep are all good, contained starting points.
- Ask any vendor the same five questions: What work does the AI actually own? Can you explain any output? Who reviews and overrides? What's the audit trail? What happens when it's wrong?
- Build the muscle before you scale it. Governance, integration, and enterprise-wide adoption matter more than which logo is on the platform.
- Keep finance in the loop by design, not by exception. The goal isn't removing judgment — it's removing the manual work that keeps judgment from happening.

Leading Through Transformation:

Making Technology Change Stick



Beth McLaughlin
Director, Organizational Change Management
UHY Consulting



Lori Banas
Chief Growth & Strategy Officer
CornerstoneX



"Technology creates the possibility of value. Change management is how organizations realize it."

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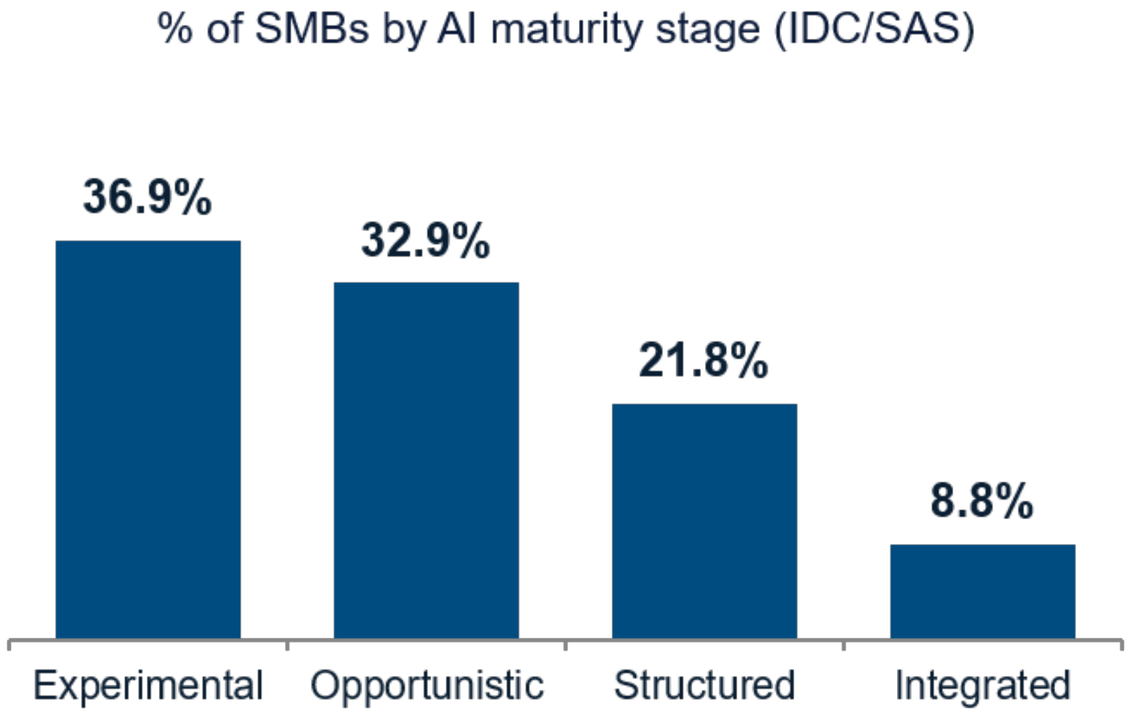
AI's impact on technology and ERP

Sanket Akerkar, President/COO of Acumatica
November 2, 2026

Acumatica Cloud ERP

SMBs are embracing AI

Adoption is spreading, but most SMBs are still early in AI maturity



32% of firms with 100-249 employees use AI, vs. 19.8% of all firms (Census)

20-23% of U.S. businesses expect to use AI within six months (Census)

Sources: IDC/SAS, AI for SMBs (May 2026; 1,600 leaders at firms with 100-499 employees, up to 999 in the U.S.); U.S. Census Bureau, Business Trends and Outlook Survey (data through May 3, 2026). Census figures cover all U.S. businesses unless a size band is stated.

AI belongs in ERP

ERP unites the whole organization, which makes it a natural home for AI

62%

of cloud ERP spending forecast to go to AI-enabled solutions by 2027, up from 14% in 2024

40%

of enterprise apps predicted to include task-specific AI agents by end of 2026, up from under 5% in 2025

30%

faster financial close forecast by 2028 with embedded AI in cloud ERP (Gartner)

Sources: Gartner press releases, Feb 2026 (cloud ERP) and Aug 2025 (enterprise apps). All figures are forecasts. The 40% figure covers enterprise apps broadly; the 62% and 30% figures are specific to cloud ERP.

A big win for SMBs

Most SMBs struggle with scattered data and disconnected AI tools

44.7%
of SMBs have data scattered across tools, with no clear owner

46.0%
run AI tools in isolation, not connected across systems

10.4%
have a platform for orchestrated workflows and AI agents

Why ERP fits SMBs

1

One source of truth
Unified data gives AI context

2

AI inside daily workflows
No stitching tools together

3

Built-in controls
Governance and human oversight

Source: IDC/SAS, AI for SMBs: Closing the Readiness-Reality Gap (May 2026); 1,600 leaders at firms with 100-499 employees (up to 999 in the U.S.), 28 countries.
.

From System of Record to System of Intelligence

An intelligent ERP that works alongside your team — advising, automating and executing work to drive better outcomes

ERP as a System of Record

- Manual workflows
- Records transactions
- Reports what happened

Journal Transactions · GL301000

Save | Release | Print | Export

Date	09/30/2026	Batch Nbr.	GL005412
Branch	MAIN	Period	09-2026

Account	Description	Debit	Credit
10100	Cash – Operating		12,450.00
12000	Accounts Receivable	12,450.00	
50000	Cost of Goods Sold	8,120.00	
13000	Inventory – Raw Materials		8,120.00
61000	Job Cost – Labor	3,860.00	
20000	Accounts Payable		3,860.00
40000	Sales Revenue		5,200.00

Balanced · 7 lines · Posted manually · Report runs month-end

Flat · Manual · Backward-looking

BUILT FOR BUILDERS, MAKERS & MOVERS

Manufacturing
Scheduling, scrap & yield insight

Distribution
Demand forecasting & replenishment

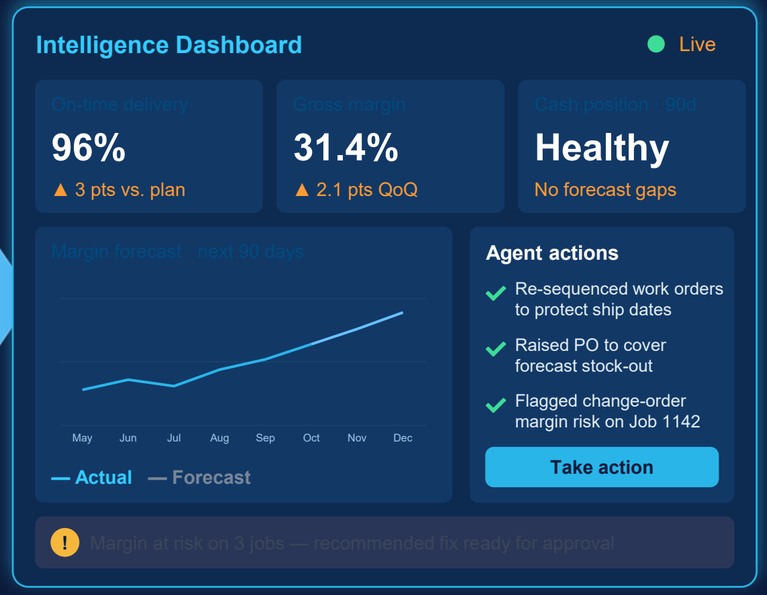
Construction
Job cost & change-order risk



Clean, governed data · Industry workflow context · AI agents that act

ERP as a System of Intelligence

- Understands the business
- Predicts what will happen
- Takes action to improve outcomes



Proactive · Automated · Forward-looking

Acumatica AI Vision Path: From Assistance to Autonomy

WE ARE HERE · OCTOBER 2026

DELIVERED · 26R2

PHASE 1

Intelligent Assistance

AI augments your team

complete

- AI Assistant GA across the editions
- Document & receipt intelligence
- Anomaly detection across GL / AP / AR
- MCP read access (phase 1) · AI Automation GA

IN BUILD · 2027-2029

PHASE 2

Agentic Automation

AI executes on your behalf — inside guardrails

underway

- Five arch agents in every edition: Advise → Assist → Automate
- Specialized agents: Payables, Sales Order, Close
- MCP read/write — any assistant, your permissions
- Predictive agents and what-if scenarios
- Partners tailor native agents and build their own

HORIZON · 2030+

PHASE 3

Strategic Autonomy

The autonomous back office, human-in-the-loop

designing

- Orchestrate tier: whole cycles run inside your parameters
- A digital workforce with human gates
- Real-time predictive ERP — the digital replica
- Community agent marketplace
- Self-healing data governance

THE STEPS WE ARE TAKING

26R2 *Oct 2026 · delivered*
AI Assistant GA · MCP read

27R1/R2 *in build*
Advise/Assist tier · MCP read/write · tool orchestration

2018-2019
Automate tier · advanced workflow & file agents · voice

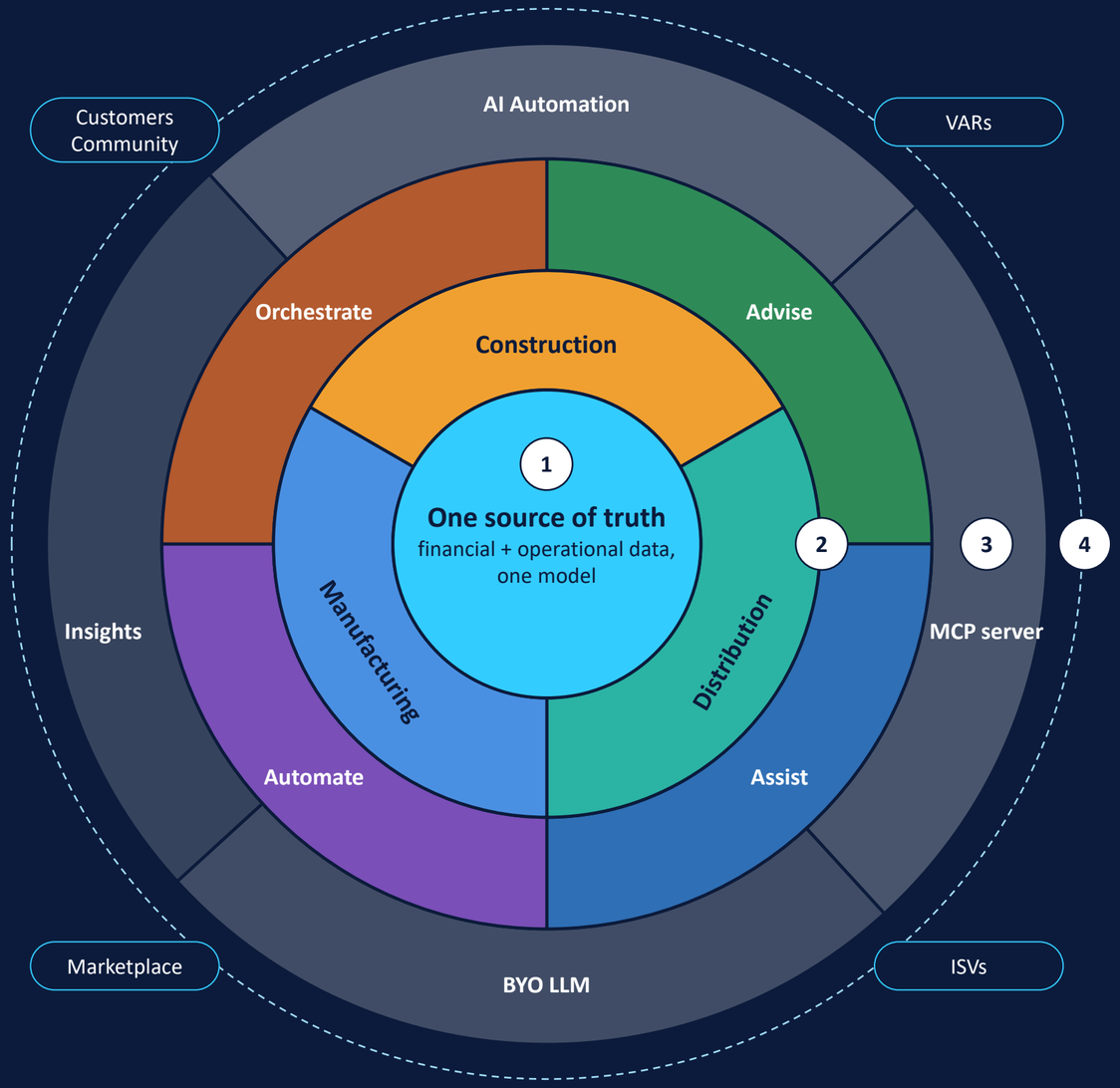
2030+ *horizon*
Orchestrate · agent-to-agent · marketplace · digital replica

CONSTANT ACROSS EVERY PHASE

- Trust framework & human guardrails
- AI Action pool
- Bring your own LLM
- Partner building blocks: AI Automation, MCP

Practical Industry AI

The ERP that knows your industry — and keeps you in charge



Acumatica - AI Leadership in the Mid-Market Space

1. **Industry-structured source of truth**

   Financials, projects, production, inventory and field on one data model, structured by industry — cost codes, BOMs, bins, retainage — and refined by process knowledge across thousands of builders, makers and movers.

2. **Embedded agents, human guardrails**

   13+ named agents across five verticals, inside the screens people already use. Authority rises from Advise to Orchestrate and the customer sets every threshold.

3. **Governed openness**

   Bring your own LLM, AI Automation, the MCP server and business-event automation: open by standard, governed by permissions, metered by AI Actions.

4. **The partner multiplier**

   VARs and ISVs build vertical specific AI inspired customizations on the same platform and the marketplace compounds it.

Customer Bill of Rights, extended to AI

Your data | Your model | Unlimited users | No AI tax | You set the guardrails

5 Arch Agents



Accounting Agent

Closes the books; keeps cost and revenue true

SHARED WORKFLOW

- **ADVISE** Flags anomalies & variances
- **ASSIST** Drafts recs & the close packet
- **AUTOMATE** Posts routine entries & matches
- **ORCHESTRATE** Runs the period close

COMMON ACROSS VERTICALS

Data GL & sub-ledgers · AP/AR docs · bank feeds · cost & WIP valuation

Guardrails Posting thresholds · closed-period lock · accrual approvals · audit trail

COVERS

ESTIMATED END-USER VALUE

−34% close time

Early 26R2 customer data against a 30% target; variances caught before they are reported



Planner Agent

Matches supply, capacity and schedule to demand

SHARED WORKFLOW

- **ADVISE** Flags shortages & conflicts
- **ASSIST** Proposes reorders & reschedules
- **AUTOMATE** Executes inside parameters
- **ORCHESTRATE** Runs & recalibrates the cycle

COMMON ACROSS VERTICALS

Data Demand & backlog · inventory & on-order · lead times · capacity

Guardrails Reorder & reschedule limits · safety-stock bounds · vendor rules

COVERS

ESTIMATED END-USER VALUE

10–20% less inventory

Estimate: fewer stockouts and expedites; planner time spent on exceptions only



Operations Manager Agent

Owns the margin and the cycle of a unit of work

SHARED WORKFLOW

- **ADVISE** Flags cost, margin & cycle drift
- **ASSIST** Drafts reports & work packages
- **AUTOMATE** Releases within thresholds
- **ORCHESTRATE** Runs the end-to-end cycle

COMMON ACROSS VERTICALS

Data Budget vs actual · commitments · work orders · billing terms

Guardrails Spend & variance thresholds · approval gates · pause any flow

COVERS

ESTIMATED END-USER VALUE

~80% less admin

Illustrative: PM admin from ~16 to ~3 hours a week; the billing cycle becomes one approval



Operator Agent

Captures work at the point it happens

SHARED WORKFLOW

- **ADVISE** Prompts for missing captures
- **ASSIST** Pre-fills time, qty & status
- **AUTOMATE** Posts validated transactions
- **ORCHESTRATE** Runs the shift or the day

COMMON ACROSS VERTICALS

Data Assignments · time · quantities · lot / serial / bin · photos

Guardrails Assigned work only · tolerances · required scans & signatures

COVERS

ESTIMATED END-USER VALUE

−50% capture time

Program target: one-tap capture, same-day cost visibility, fewer manual-entry errors



Quote & Order Agent

Turns demand into a priced, promised order

SHARED WORKFLOW

- **ADVISE** Flags price, credit & margin
- **ASSIST** Drafts quotes & orders
- **AUTOMATE** Processes clean orders
- **ORCHESTRATE** Runs quote-to-promise

COMMON ACROSS VERTICALS

Data Customers & contracts · price lists · ATP & capacity · credit

Guardrails Discount limits · credit holds · margin floors · ATP-only promises

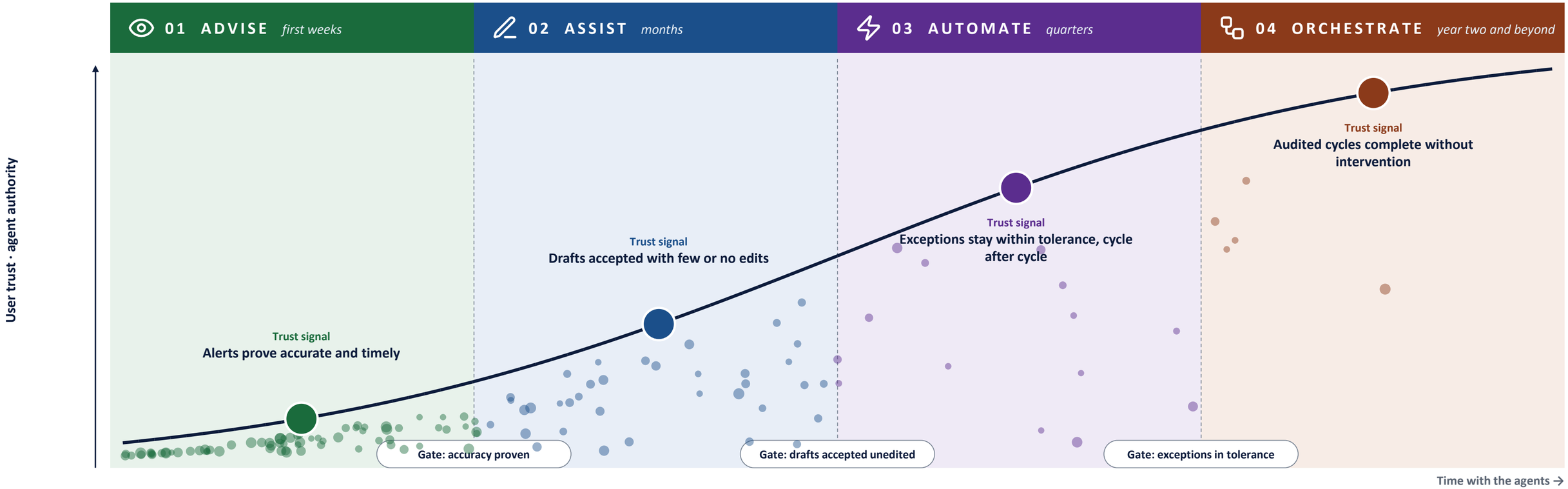
COVERS

ESTIMATED END-USER VALUE

Hours → minutes

Customer case: order to shop floor from 24+ hours to 3 minutes; pricing and credit errors near zero

Customer Engagement Framework – Earning the right to automate



Interactions per week: many small ones first, fewer and bigger later

Agent Watches data users already trust; raises alerts inside their screens; never touches a record

User Verifies the alert against what they know; decides everything

Engagement Turns on with the edition — no new tool, no behavior change; weekly digests; the partner shows the first catch

Agent Prepares the work from live data — drafts, packets, pre-filled forms

User Reviews, edits, confirms before anything posts

Engagement Partner-led workflow reviews; accept/edit telemetry shared with the customer; a champion is named

Agent Executes routine, rules-based transactions; escalates exceptions with full context

User Sets thresholds, locks and tolerances; gates exceptions only

Engagement Guardrail workshop; pilot one workflow; monthly exception review; premium skill unlocked per agent

Agent Runs whole cycles — close, billing, replenishment — inside the customer's parameters

User Approves at defined gates; audits; can pause any flow

Engagement Quarterly value review against outcome metrics; expand agent by agent; reference and community stories

Meet users inside their workflow Agents live in the screens people already use — nothing new to adopt

Authority follows evidence Promotion is per flow and earned with telemetry, never by default

The human keeps the guardrails Thresholds, approvals, audit trail and the right to pause — at every tier

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Thank You

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From Transformation to Value: ERP & Technology Investments



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AI In Action

Turning AI Into A Competitive Advantage



Cory McNeley
Managing Director, UHY Consulting

Practical AI Work Products You Can Test

01 **A margin variance brief**

Explain the numbers and identify the next checks.

02 **An invoice exception queue**

Organize mismatches for accounts payable review.

03 **A bid-compliance review**

Compare requirements with the evidence supplied.

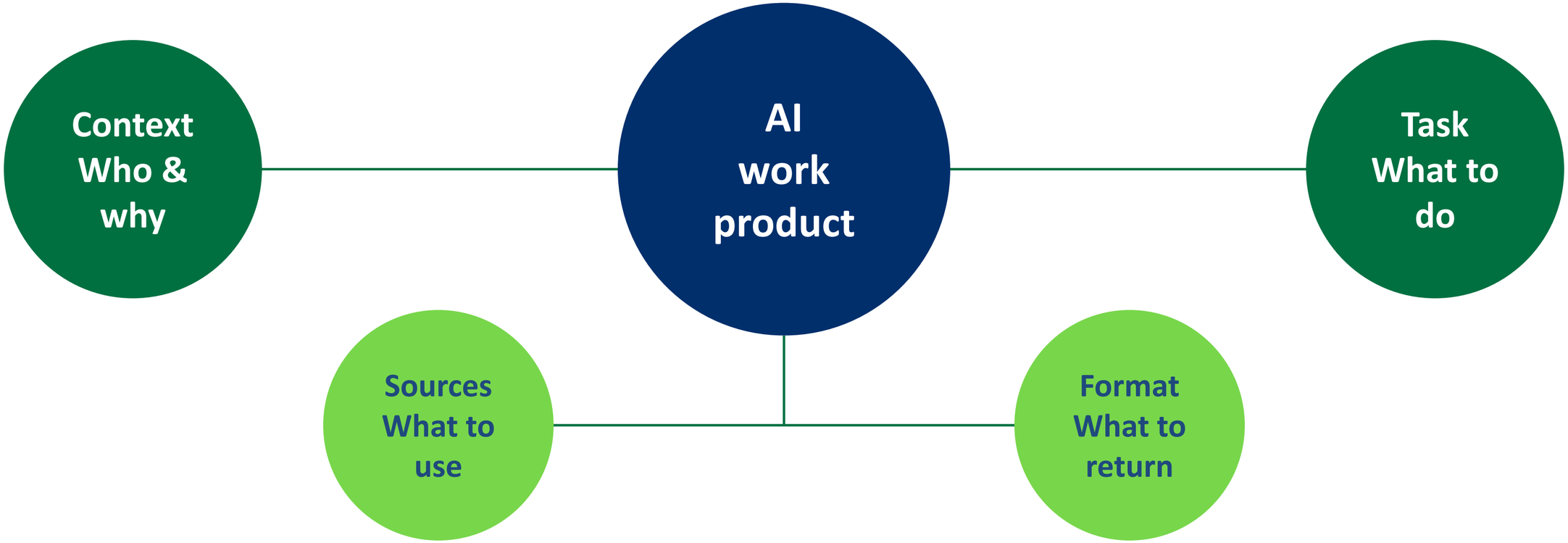
04 **A repeatable test method**

Score actual outputs before using them more widely.



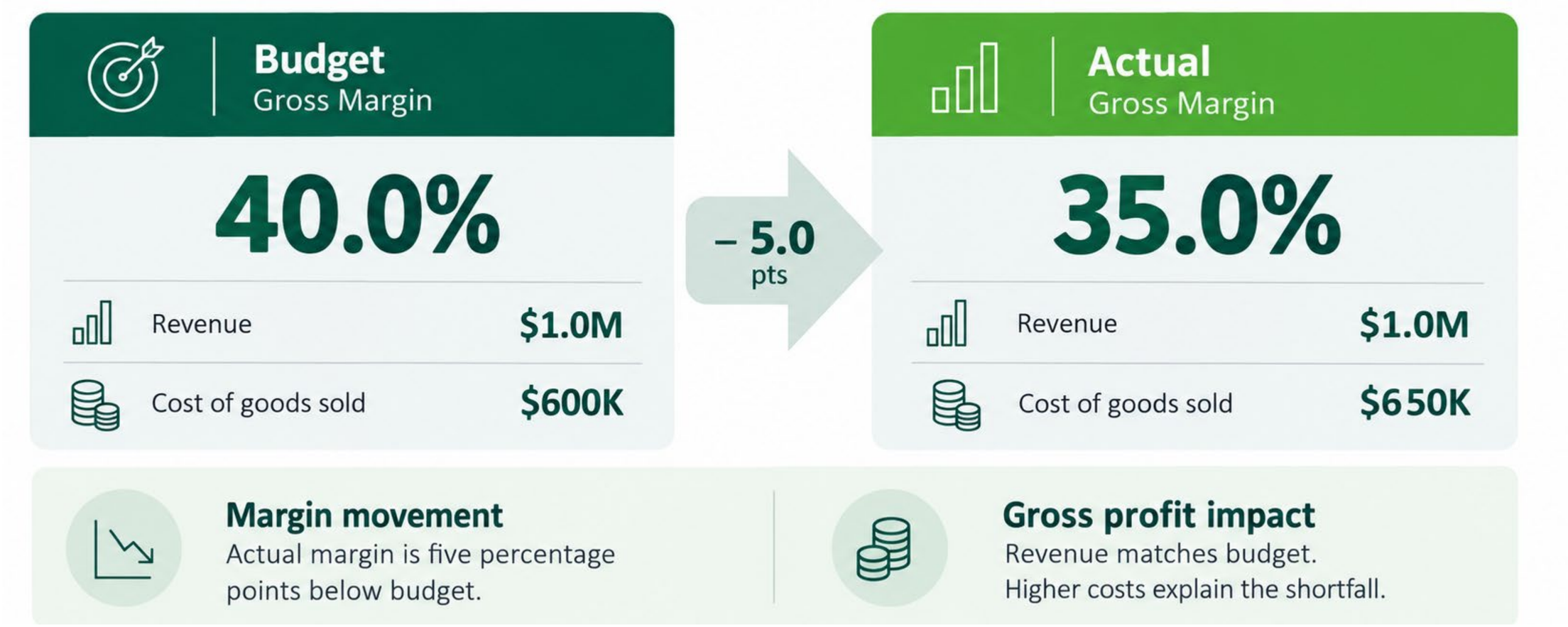
The Instructions Behind A Useful AI Result

Example: Explain a margin variance using only the supplied financials.



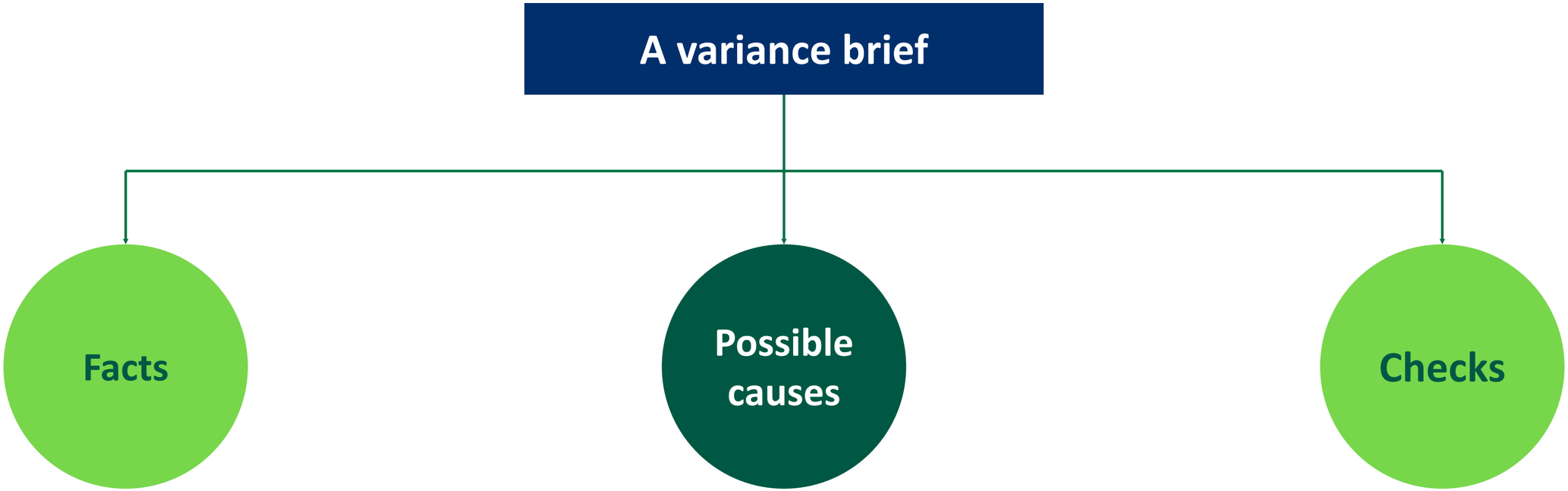
Example 1: Explaining A Margin Variance

Illustrative figures. Revenue is $1.0M in both budget and actual.



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The Finance Brief Separates Facts From Hypotheses



$50K gross profit shortfall
Revenue matches budget
COGS increased $50K

Material cost pressure?
Unfavorable product mix?
Lower production yield?

Purchase price variance
Item-level mix and margin
Scrap and yield reports

The supplied totals establish the variance. Root causes need additional evidence.

Example 2: An Invoice Exception Queue

Illustrative batch. AI organizes issues for accounts payable review.



Each flag needs a source record and a reason a reviewer can check.

Invoice ID **Exception** **Evidence** **Next step**

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The Invoice Queue Should Make Review Easier

Illustrative records. Each flag identifies evidence a reviewer can check.

Record	Exception	Evidence in the supplied records	Suggested next step
INV-101	Possible duplicate	INV-109 has the same vendor, invoice number, and amount.	Check for a repeat upload
INV-102	Price mismatch	Invoice unit price: $12.50 Purchase order unit price: $12.00	Confirm the agreed price
INV-103	Missing receipt	No receipt appears in the supplied batch.	Ask the buyer to confirm delivery

Payment approval follows the existing process.

Example 3: A Bid-Compliance Review

Compare a request for quotation with approved capabilities and offer details.



AI prepares a requirement-to-evidence matrix and a list of open questions.

Delivery requirements

- Production capacity
- Lead time and logistics
- Quality and regulatory requirements

Technical specifications

- Product configurations
- Material and performance standards
- Testing and certification requirements

Commercial terms

- Pricing and discount structure
- Payment terms
- Contract terms and conditions

The draft uses supported commitments and leaves unresolved requirements open.

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A Bid Review Makes Missing Evidence Visible

Illustrative RFQ comparison. Unverified items remain open.

Requirement	Supplied evidence	Finding	Next step
Delivery within 6 weeks	Schedule shows 8 weeks	**2-week gap**	Confirm attainable delivery date
Current certification	Certificate has expired	**Not verified**	Obtain a current certificate
Material grade A	Datasheet lists grade A	**Match found**	Confirm quoted item and revision
Warranty of at least 12 months	Quote does not state a warranty	**Missing**	Add approved warranty terms

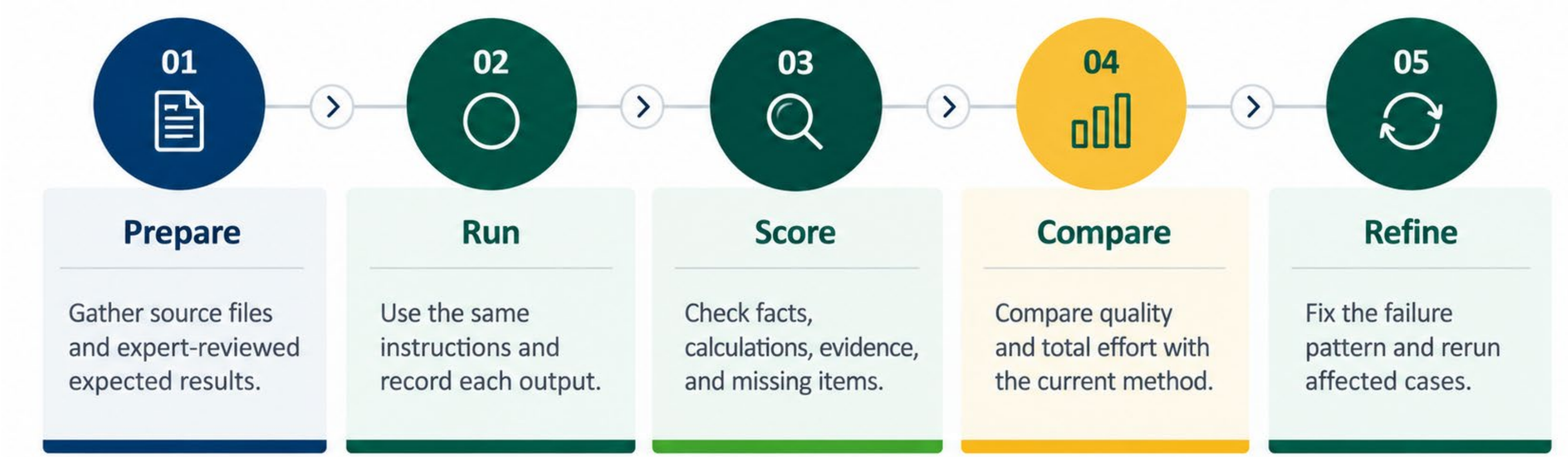
An absent fact stays unresolved until someone supplies the evidence.

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A Repeatable Test For Every AI Work Product

Illustrative starter set: 20 known cases, including routine work and exceptions.



Track incorrect conclusions and missed exceptions separately.

Six Failure Tests Before Wider Use

01 **Missing input**

Does it flag a missing receipt or make one up?

02 **Conflicting sources**

Does it surface two different delivery dates?

03 **Wrong arithmetic**

Does it calculate margin and units correctly?

04 **Invented evidence**

Can every conclusion be traced to a source?

05 **Instructions in a source**

Does source text redirect the assigned task?

06 **Changed file format**

Does it notice a renamed or shifted column?

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Invoice Pilot: A Worked Capacity Calculation



Illustrative capacity value. Cash savings require an actual reduction in spending.

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The Next Step: A Working Example

- A representative input file
- An example of the expected output
- A scorecard for reviewing the result



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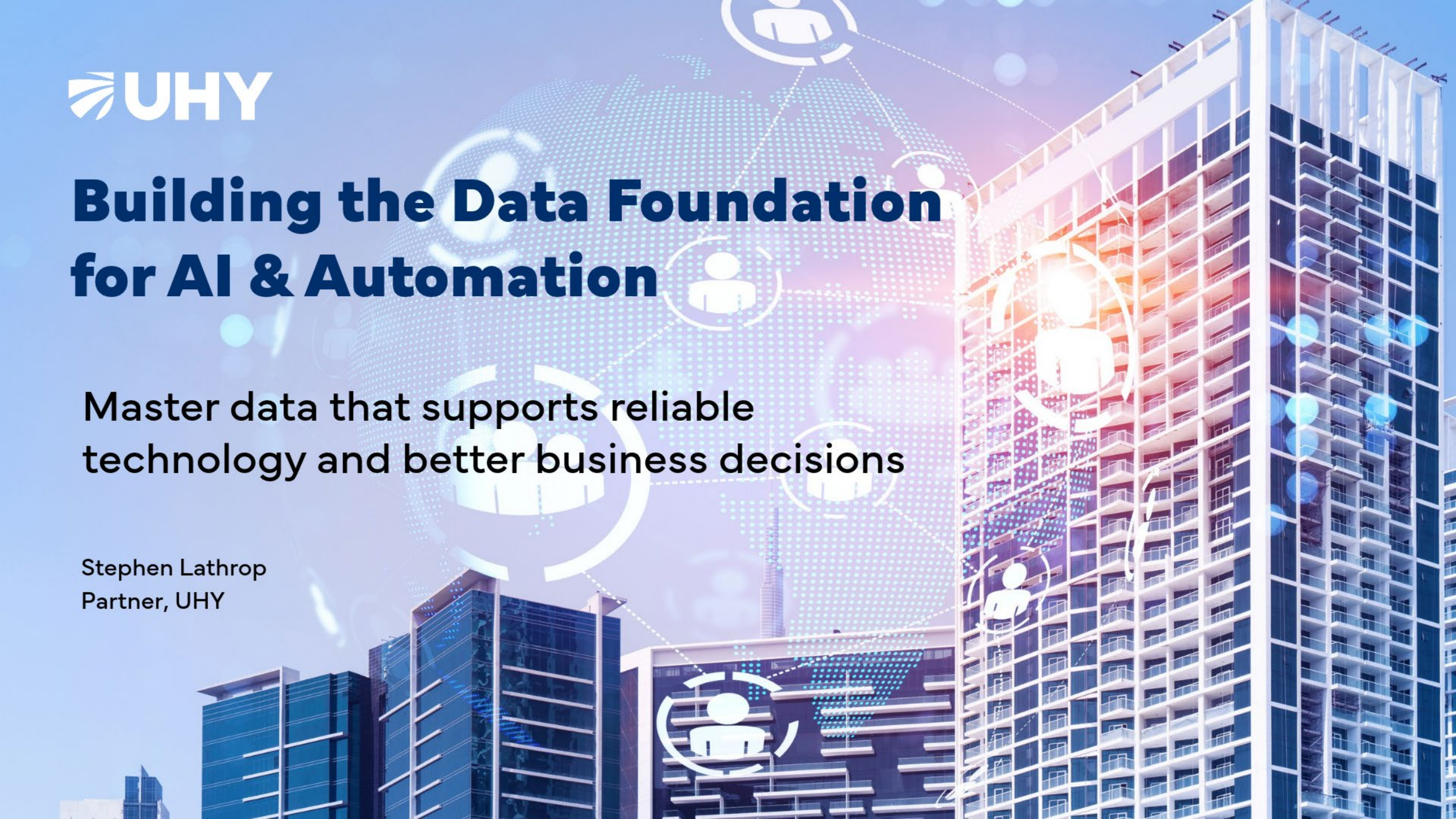
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Building the Data Foundation for AI & Automation

Master data that supports reliable technology and better business decisions

Stephen Lathrop
Partner, UHY

Can we deliver on our promises?

On time

A date grounded in supply, capacity and lead times.

In full

The right configuration, quantity and quality requirements.

At margin

Cost assumptions that reflect the work we will perform.



Weak master data can turn a confident promise into shortages, overtime and expedite costs.

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Technology can get blamed before the root cause is known

“The ERP cannot plan.”

“The report is wrong.”

“AI does not understand our business.”

01 **Data**

Definitions, completeness, duplicates, timeliness

02 **Process**

Handoffs, approvals, workarounds, exceptions

03 **Configuration**

Planning parameters, controls, business rules

04 **Integration**

Mapping, sequencing, latency, error recovery

05 **Adoption**

Training, role clarity, use of the process

Ensure your data is clean and complete so the technology has a fair chance to perform.

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The data behind the customer promise

Data type	Business role	Examples
Master data	Shared identity, structure and business rules	Customers, vendors, items or services, materials, BOMs, routings, locations, chart of accounts
Transactional data	Commitments and recorded business activity	Sales orders, purchase orders, production confirmations, shipments, invoices
Operational data	What is happening during execution	Capacity, downtime, WIP, scrap, yield, actual cycle time, maintenance signals
Knowledge content	Reference material used to interpret the work	Contracts, specifications, policies, work instructions, approved AI knowledge sources

Master data provides the shared definitions that connect transactions, operations, and knowledge content.

Three disciplines create a reliable data foundation

01

Standardize

Align definitions, remove duplicates and establish the authoritative source.

Consistent business meaning

02

Capture

Collect the detail and signals that explain variability and support decisions.

Better predictive context

03

Govern

Assign ownership, control changes and monitor integration and data quality.

Durable trust

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Data standardization begins with business decisions

Start with the end in mind: business decisions determine the data, detail, and controls required.

1 → 2 → 3 → 4 → 5

Decision

Name the operational, customer or financial question.

Required data

Identify the facts and definitions needed to answer it.

Granularity

Set the detail by customer, item, order, location, line or shift.

Profile and standardize

Find gaps and align values, hierarchies and business rules.

Source and control

Assign the source, owner, workflow and integration.

Where missing data becomes visible

Where are we making assumptions?

Required information compared with available, controlled information

The decision

What facts and history would improve the decision? What do people estimate today?

The handoffs

Where do spreadsheets fill gaps? Where is information lost between functions?

The exceptions

Which shortages, expedites or overrides repeat? Which causes cannot be quantified?

The gap defines the information to capture and the control to improve.

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The customer promise with governed data



Confirm requirements

Customer, configuration, quantity, timing and service needs.

Verify inputs

Approved structure, sourcing rules, lead times and availability.

Test feasibility

Current capacity, timing, quality requirements and constraints.

Make the promise

A feasible date, quantity and expected business outcome.

Earlier risk visibility. Controlled change. Fewer surprises.

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AI supports the promise decision

Recommend a date, offer an alternative or escalate a constraint.

Governed inputs	Analysis and AI	Accountable decision
Order requirements Inventory and incoming supply BOM, routing and capacity Quality and customer rules Costs and current exceptions	Compare feasible scenarios Estimate delivery and margin risk Explain the recommendation Identify the constraint	Accept the requested date Offer another date or quantity Recommend an intervention Route material commitments to the accountable owner

Human review remains responsible for material customer and margin commitments.

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One data foundation supports many AI uses

Demand forecasting

Customer, product or service and channel hierarchies

Inventory optimization

Item, location, units of measure and lead-time data

Predictive maintenance

Equipment, component and maintenance history

Delivery-risk prediction

Order, sourcing, routing and customer rules

Quality and yield

Material, revision, process and defect definitions

Margin and cash

Customer, product, vendor and finance dimensions

One foundation. Many uses.

Reliable master data connects the definitions used across applications.

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RAG requires governed content

Retrieval-Augmented Generation retrieves company information before the AI generates an answer.

1 → 2 → 3

Retrieve

Find relevant, approved information.

Augment

Add the information to the AI request as context.

Generate

Produce an answer using the retrieved context.



Content controls Owner, approval, effective date, version, access, review and retirement

RAG uses context. Source accuracy and access still need controls.

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Governance is an operating discipline

System of record

The authoritative value for each data element.

Which source wins when systems disagree?

Business owner

Defines meaning, policy and acceptable quality.

Data steward

Maintains records, resolves exceptions and monitors quality.

System owner

Configures validation, workflow, security and auditability.

Integration owner

Maintains mappings, monitoring and error recovery.

Create → **Approve** → **Change** → **Distribute** → **Monitor** → **Retire**

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A reliability scorecard

Proposed measures for the selected data scope. Set targets after establishing a baseline.

Signal	What to measure	Review owner
Completeness	Critical records with required fields populated	Data steward
Validity	Records passing agreed business rules	Business owner
Uniqueness	Confirmed duplicates among active master records	Data steward
Integration	Unresolved failures and the age of the backlog	Integration owner
Knowledge	Approved content within its review date	Content owner
Business outcome	Promise exceptions and costs by root cause	Process owner

Review quality and business outcomes together. A cleaner field should improve a decision.

A focused first 90 days

Proposed pilot for one high-value decision and a limited data scope.

Days 1–30

Scope and baseline

Choose the decision and critical data.
Name owners and sources.
Profile quality and establish a baseline.

Gate: agreed scope and ownership

Days 31–60

Standardize and control

Correct the priority data issues.
Add validation and approval rules.
Test downstream distribution.

Gate: reliable inputs in the pilot

Days 61–90

Operate and prove

Run the workflow with users.
Review exceptions and outcomes.
Train owners. Decide what to scale.

Gate: operating controls and evidence

Master-data readiness

Ready to scale?

01 **Decisions**

Which operational or financial decision matters most?

02 **Definitions**

Are critical business elements defined consistently?

03 **Completeness**

Do we capture the right detail and missing signals?

04 **Ownership**

Are the authoritative source and owners named?

05 **Maintenance**

Are change, quality and content controls operating?

Choose one visible business outcome. Close its most important data gap.

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Reliable data.
Better promises.

Every platform benefits from standardized, governed data.

- **ERP**
- **ISV & Automation**
- **Analytics**
- **AI**



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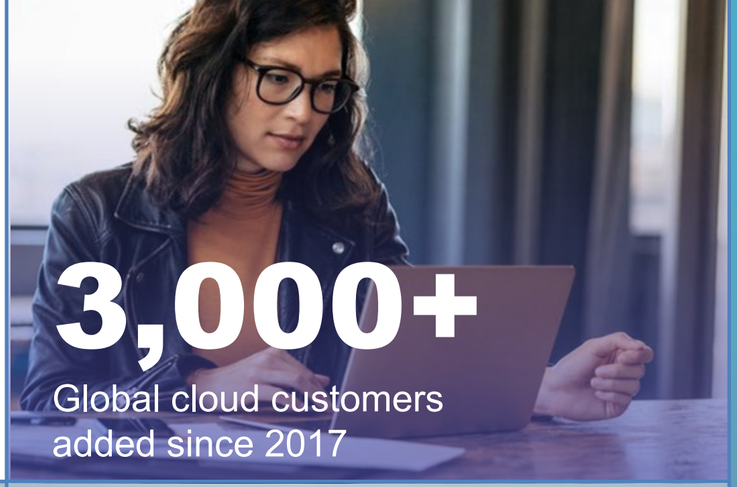
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Prophix One

Built for growing, operationally complex organizations

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Connect to possibility

Technology Summit: *Powering What's Next*
Monday, November 2nd, 2026



1400
Customer Count

North American Offices
Canada
USA

FTEs: 325+

700
Customer Count

LATAM Offices
Brazil

FTEs: 125+

700
Customer Count

EMEA Offices
UK
Belgium
Denmark
France
Germany
South Africa

FTEs: 75+

200
Customer Count

APAC Offices
Australia
Singapore
India

FTEs: 60+



Prophix HQ – Toronto | Prophix Regional Offices | Prophix Customers









Solution Options

Choosing the right solution is rarely simple — it has to fit your business today, scale with where it's headed, and deliver value, trust, and speed along the way.

•Spreadsheets + AI

•Excel got smarter. The problem didn’t. No governance.
•No audit trail.
•Version chaos at board time.

•Point Solutions

•Solve one problem. Create the next one. More tools equals more gaps, more risk, more reconciliation.

Enterprise Platforms

Built for Fortune 500. You pay for it. 18-month implementation. 3-5x your budget.

ERP-Native Modules

One system’s view. Your blind spot. Can’t see across ERP’s, HRIS, CRM

•Prophix One

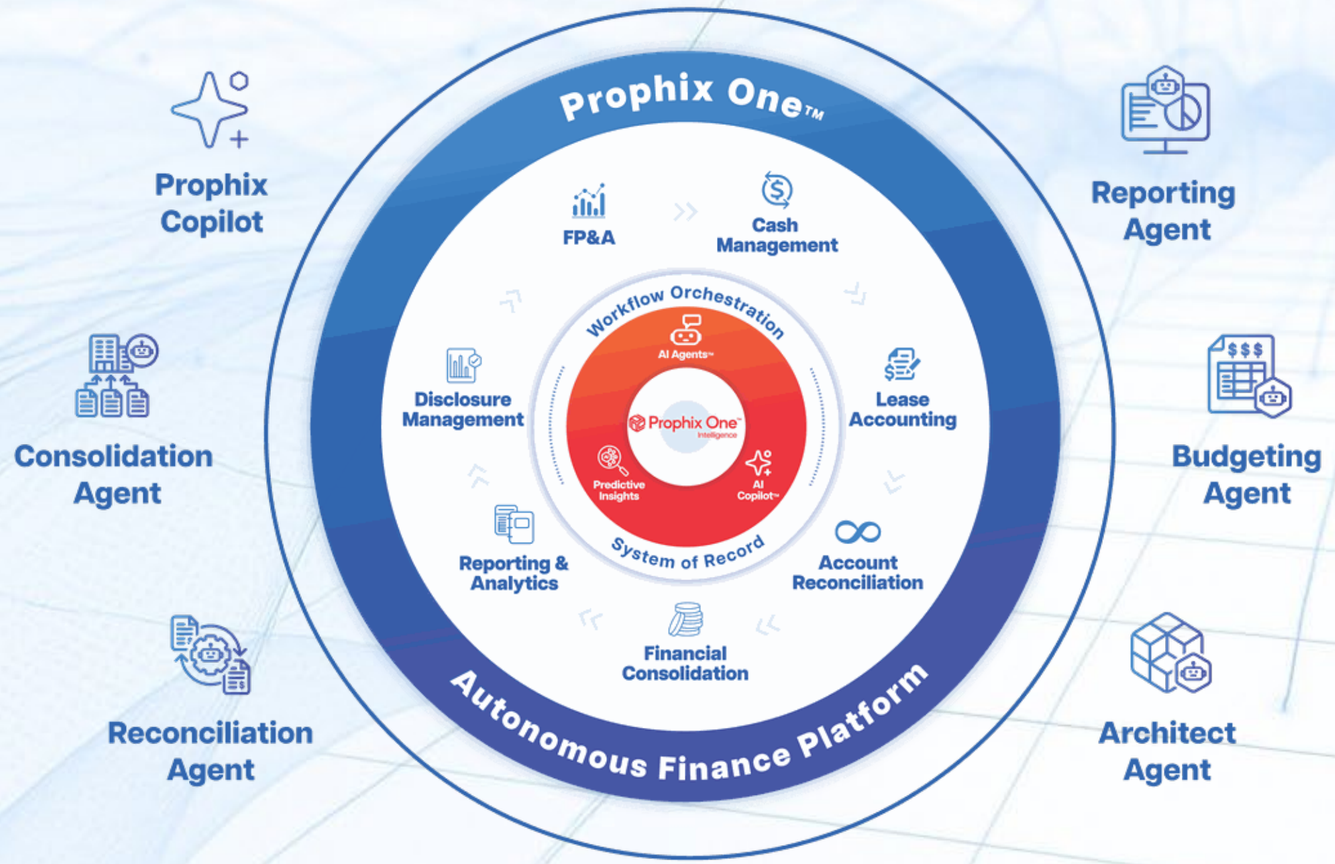
•One platform. Every finance workflow. Your team owns it. Mid-Market price. Enterprise-grade depth. Live in 8-12 weeks.

- ✓ Value in weeks, not months.
- ✓ Plan → Close → Consolidate → Report
- ✓ Works with your existing ERPs
- ✓ Glass-box AI: every calculation auditable
- ✓ SOC 2 + ISO 27001.
- ✓ 110+ countries.

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Introducing

Prophix One™



Prophix One™

Applications | *Use Cases*

Prophix One™ Intelligence

Financial Planning & Analysis

Close & Consolidation

PROPHIX ONE APPLICATIONS



FP&A Plus



Cash Management



Account Reconciliation



Intercompany Management



Financial Consolidation



Lease Accounting



Disclosure Management *

USE CASES

- Performance Reporting
- Board Books
- Ad hoc Analysis
- OPEX Planning
- Predictive Forecasting
- Revenue Planning
- Financial Reporting
- Dashboards & Visualizations
- ESG Reporting
- Personnel Planning
- Workflow

- Direct Cash Flow Visibility
- Cash Flow Scenario Modeling

- General Ledger Reconciliation
- Bank Reconciliation

- Intercompany Eliminations & Matching

- Multi-Entity Consolidation
- IFRS to GAAP Conversion
- Sub-Consolidation

- IFRS 16
- FRS 102
- ASC 842

- **Disclosure Management**
- **XBRL Reporting**

FOUNDATIONAL SHARED SERVICES

- Centralized User Security
- Data Integration
- Shared Data Model
- Solutions Marketplace
- Audit & Logging
- Common Launch Portal
- Prophix Copilot

* Partner Solution

Prophix One™

Autonomous Finance | *the operating model Prophix One delivers*

Access Points

Prophix Copilot |

Prophix Agent Orchestration

Finance team sets the rules, agents execute the steps without manual handoffs.

- Budgeting Agent
- Reporting Agent
- Reconciliation Agent
- Architect Agent
- Consolidation Agent

Prophix MCP Server*

Trigger Agent Workflows • Query Governed Foundation • Structured tool calls

Governed Foundation

Planning Logic • Driver models • Assumption Versioning • Variance Patterns • Cohort Intelligence • 25 years of Deterministic Financial Logic

- Plan
- Consolidate
- Close
- Report

Integration & Connection Layer

300+ Pre-Built Adapters • Real-time & Batch • Bidirectional Sync

- Vertical Connectors
- ERP & Financial Systems
- HRIS & Data Sources

Ecosystem

Marketplace

Industry Modules
Pre-built templates
Vertical KPI packs

Partners

SI & Implementation
Global network of certified partners

Advisory
Accounting & CFO Advisory Firms

Technology
ISV & Technology Integrations

aws marketplace

The Evidence Locker

Validated by Data. Loved by Customers.

The Analyst Consensus

Prophix, an **8x Leader**, holds more "**Leader**" quadrant positions than any other vendor.









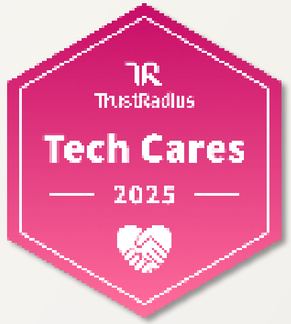


Global Peer Recognition

Prophix has been awarded the **"Top Rated"** and **"Buyer's Choice"** award for 8 years in a row and **"Tech Cares"** 6 years in a row.











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