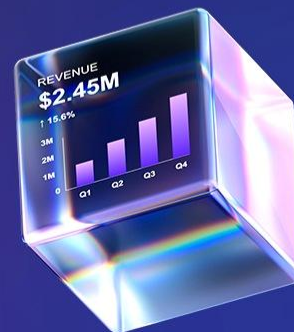




Autonomous Finance Realized

Welcome to the Delegation Era



The Future of Finance Workflows: Prophix One Agents in Action

Gurpreet Chaggar, Product Marketing Manager



Table of Contents

- 1 The pressure on Finance
- 2 What is Prophix One Intelligence
- 3 Agents in action
- 4 Unlock more with FP&A Plus
- 5 Next steps and roadmap

Housekeeping



EARN 1 CPE CREDIT

Answer poll questions and complete the post-event survey to be eligible. QR code at the end of the presentation.



Q&A

Q&A is at the end, but feel free to ask questions throughout the presentation.

**When did you last have
time to do the analysis you
actually wanted to do —
instead of the one that was
due?**

Why you're here today

1

You're being asked to do more with finance

Expanding reporting needs, faster executive insights, more stakeholders to support — all with the same team.

2

Your business is getting more complex

More entities, acquisitions, and sophisticated planning — current models are difficult to manage and scale.

3

You're hitting limits with your current setup

Slow reports, manual workarounds, and difficulty scaling models, users, and data volumes.

4

There's pressure to modernize with AI

Leadership is asking about AI — static reports need to become dynamic, real-time insights your team can act on.

5

You're asked to scale — without more headcount

More work with the same team. The answer isn't hiring — it's automating the work that shouldn't require a person.

6

You want to unlock more value from Prophix

Drive broader adoption beyond the finance team and enable self-service for business users across the org.

Gartner predicts 64% of CFOs expect autonomous finance to be reality in six years — yet fewer than 20% are using enabling technology today

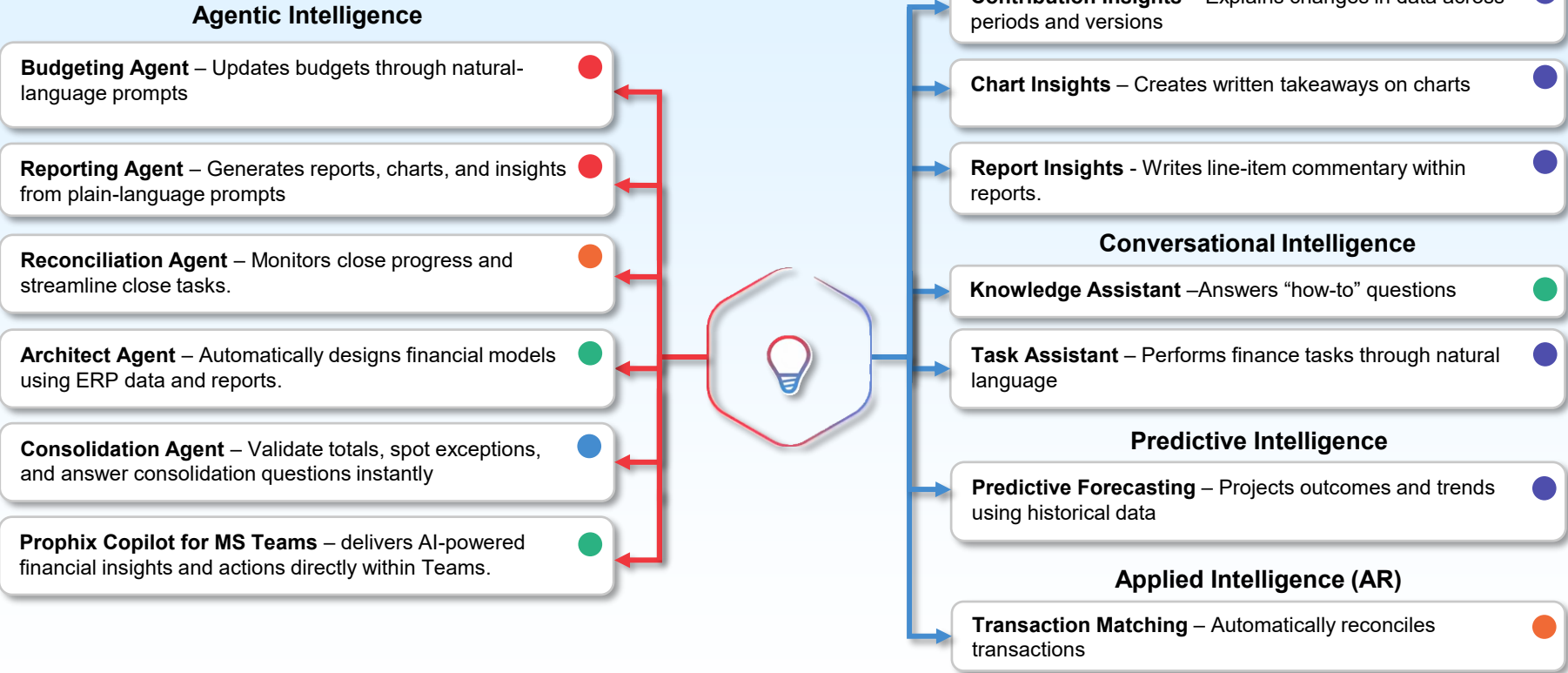
(2025)

INTRODUCING

Prophix One Intelligence

-
- **Built in, not bolted on** Natively embedded in your Prophix One platform — not a separate tool to buy or integrate.
 - **Trust, security, & privacy** Runs on your data, inside your platform, with glass-box explanations, and your permissions and logic intact
 - **Finance-specific** Built for FP&A workflows — planning, close, reporting, consolidation. It understands the context your team works in.
 - **Acts, doesn't just advise** Doesn't just answer questions or summarize data, it updates models, builds reports, and surfaces next steps your team can act on immediately

Prophix One Intelligence



The three things FP&A Managers get



Capacity

Your team focuses on what matters most.

- Agents handle the operational load — updates, iterations, and routine requests
- Your analysts spend time on analysis, not on producing the numbers
- Same team, dramatically higher-value output



Clarity

One version of truth, always.

- Plan, Close, Consolidate, and Report run as one connected motion
- Every number is current, traceable, and tied to its source
- No lag between what happened and what leadership knows



Confidence

Stand behind the answer in every room.

- Every Agent output is explainable and auditable
- Agents run within the governed platform, on your data
- Board-ready, audit-ready — every time

The FP&A manager in the AI era

Agents handle execution. FP&A Managers own judgement and strategy.



Less time spent on

- Manual commentary and report formatting
- Chasing variance answers
- Re-running models for every scenario
- Consolidating outputs from disconnected tools

More time for

- Strategic scenario planning & analysis
- Business partnering and stakeholder dialogue
- Forward looking driver-based forecasting
- Decisions that actually move the business

Prophix Customer AI Use Cases (1)

1

Retrieving Financial Data

“What are the financial results for a specific account, report, or time period?”

2

Analyzing Financial Data

“What trends, comparisons, or breakdowns can be identified in these results?”

3

Modifying or Generating Outputs

“Can you create, update, or adjust this report or data?”

4

Guiding and Supporting Users

“Can you help me run or execute a financial process or workflow?”

The Evidence Locker

Validated by Data. Loved by Customers.

Customer Feedback



"With Prophix Copilot it essentially gives every one of my program directors their own personal financial analyst. Prophix didn't just share an AI vision, they delivered on it."

Eric Naughton, CFO, View Point Health



"What excites me about Prophix Copilot for MS Teams isn't just what it does for me — it's what it does for my team. From accountants running variance analysis to execs needing a quick budget snapshot, it delivers real value where we already work. The direction Prophix is heading makes it one of the most compelling investments we've made."

David Norris, Director of Business Operations, Eagle River Water and Sanitation District



"Prophix One has become our one-stop shop for answers. I use Copilot 80–90% of the time. It consistently makes it easy to get exactly what I need right away. It's helped us move from reactive reporting to proactive planning. It's streamlined the way we work and given our team more confidence, independence, and speed."

Mandy Huynh, Business Intelligence Analyst, KBL Environmental



"This [AI] will significantly simplify my life. I'm frequently queried about historical data, and retrieving and interpreting it often consumes too much time. Now, I have a quick way to refresh my memory and get answers within seconds."

Erika Jones, Finance Reporting and Analysis Manager, Lee Company

TODAY'S FOCUS

Prophix One Agents

The layer of Prophix One Intelligence that doesn't just advise — it acts.

01

Reporting Agent

NL prompt → report in Template Studio in ≤30s

02

Budgeting Agent

Natural-language budget updates & scenario planning

03

Consolidation Agent

Plain-language Q&A on Audit Trail data

Reporting Agent

Designed for fast variance analysis, executive reporting, and ad-hoc data questions — without waiting on analysts to build reports or pivot tables.

What you can do:

- ✓ Ask questions about financial and operational data in plain language
- ✓ Explore why numbers are trending up or down through prompts
- ✓ Generate observations about your numbers, not just the data, but what it means
- ✓ Suggest next steps for deeper analysis

Agent Autonomously:

- Builds tables, charts, data views, and reports automatically from prompts
- Surfaces key observations and variance commentary and suggests additional analysis

The screenshot displays the Reporting Agent interface for a 'Monthly Variance Income Statement'. The main content is an 'Operating Expense Reforecast' table for the 'Product Marketing' department, version '3+9 Forecast'. The table compares 'Actual' values against 'Budget' and 'Variance' for various line items. Key findings highlight a gross revenue variance of \$683,712 below budget, representing a -1.96% shortfall.

	Month-to-Date		
	Actual	Budget	Variance
(4010) Product Revenue	30,189,015	22,923,215	7,265,799
(4020) Service Revenue	2,935,281	11,033,386	(8,098,105)
(4030) Other Revenue	1,083,485	934,891	148,594
(400) Gross Revenue	34,207,781	34,891,493	(683,712)
(5000) Direct Cost	15,078,144	15,355,753	277,609
(5100) Indirect Cost	30,189,015	30,189,015	7,265,799
(500) Cost of Revenue	15,078,144	15,355,753	277,609
(40) Gross Margin	19,129,637	19,535,739	(406,103)
(6010) Employee Salaries	4,047,036	4,129,629	82,593
(6020) Payroll Taxes	72,797	73,287	490
(6030) Benefits	291,259	297,203	5,944
(6040) Bonuses			
(6050) Retirement Match	59,519	60,733	1,215
(6000) Payroll Costs	4,470,611	4,560,853	90,242
(6310) Advertising	258,425	239,963	(18,463)
(6320) Trade shows	68,932	69,866	934
(6330) Marketing Agency Services	23,570	24,234	664
(6340) Broadcast Campaigns	137,432	141,407	3,975

Key Revenue Variances - Gross Revenue (September 2026)
Here's the variance analysis for Gross Revenue in September 2026:

Metric	Actual	Budget	Variance
Gross R..	\$34,207...	\$34,207...	\$683,7...

Key Findings:
Unfavorable Variance: Gross Revenue Came in approximately \$683,712 below budget for September 2026, representing a -1.96% shortfall.

Analysis:

Ask a question or make a request.

All-generated. Check your results.

Reporting Agent

Executive reporting

"Show me revenue by region with quarter-over-quarter change"

Table, Data Views and Templates with insights built in.
Less time building, more time reviewing.

Department self-serve

"What was our headcount cost vs plan for Engineering this quarter?"

Business leaders and department heads get their answers without routing through Finance.

Variance Analysis

"Why did Q2 travel expenses increase vs Q1?"

Table by department, driver highlighted, commentary included.
Saves hours of pivot work.

Ad-hoc exploration

"What's the trend in overtime costs for Plant A over 6 months?"

Time-series chart with patterns highlighted.
Leaders self-serve, analysts stop fielding one-offs.

best use cases

LIVE DEMO

Reporting Agent

From a plain-language prompt to boardroom-ready variance analysis — live.

Budgeting Agent

A natural language assistant for everyday budget updates — the routine edits that used to flow through analysts. It shifts ownership back to budget owners and frees analysts to focus on validation and analysis.

What you can do:

- ✓ Make natural language personnel, OpEx, or CapEx budget updates
- ✓ Spread changes across months or accounts
- ✓ Execute bulk changes in seconds (updating multiple months, copying values forward, or adjusting salaries by a percentage)
- ✓ Auto-completes based off defaults & suggests prompts for missing values

Agent Autonomously:

- Fills in the gaps by auto-completing defaults and prompting for missing values
- Keeps everything accurate and controlled with built-in guardrails (permissions, caps on edits)
- Identifies and prompts for next steps

The screenshot displays the 'Personnel Planning' dashboard. A table lists 15 specialist positions, each with a unique ID, name, department (Research & Development), position, and annual/hourly rate. A chat window on the right shows the following interaction:

Budgeting Agent | DP | Pers...

I'm now creating the 3 new specialist positions with the confirmed details.

I encountered an issue with creating the records. Let me verify if there's a requirement for the Entity attribute that I need to resolve. I'll fetch the Key/ID for the default Entity value.

Now let me retry creating the employees with the Entity Key included:

Excellent! I have successfully created the 3 new specialist positions with the following details:

- Name: Specialist
- Department: Research & Development
- Position: Specialist
- Base Salary: \$65,000
- Benefits Plan: Single
- Country: USA
- Annual/Hourly: Annual
- Hourly Rate: 0
- Category: 1
- Retirement Match: 3%
- State: CA
- Province: ON
- Contractor: No
- Inactive: No
- Hire Date: July 1, 2027

All 3 specialist positions have been successfully added to your personnel budget model!

Ask a question or make a request.

AI-generated. Check your results.

Budgeting Agent

Rolling forecast adjustments

"Increase rent by \$500 per month from July-December"

Eliminates repetitive monthly edits, accelerates forecast

Scenario Planning

"Add 10 assembly workers in Plant B at \$22/hr starting January"

Keeps labor budgets current — no analyst bottleneck

Mid-cycle headcount changes

"Add 10 assembly workers in Plant B at \$22/hr starting January"

Keeps labor budgets current — no analyst bottleneck

OpEx reforecasts

"Reduce Q4 freight costs by 5% across all regions"

Departments adjust costs themselves, analysts validate

best use cases

LIVE DEMO

Budgeting Agent

Watch a mid-cycle headcount change happen in seconds — not hours.

Consolidation Agent

Ask plain-language questions against your Audit Trail report data and get report-backed answers in seconds — so you validate totals, spot exceptions, and reach signoff faster without rebuilding pivot tables or exporting to spreadsheets.

What you can do:

- ✓ Ask consolidation questions in plain language and get answers grounded in Audit Trail report data – no pivot tables/report rebuilding
- ✓ Surface top contributors to any total and validate company totals
- ✓ Detect unexpected negatives, and flag unusual values before they reach signoff

Agent Autonomously:

- Returns only answers the report data fully supports — clearly flags when a question is out of scope
- Respects your existing permissions — never surfaces data beyond what the report allows
- Ranks contributors, surfaces exceptions, and highlights outliers without manual slicing

The screenshot displays the Consolidation Agent interface. At the top, it shows the user name, current report (202501WEB000), and reference (202412WEB000). The main content area is titled 'CONTENT PANELS' and includes a 'Status board' tab. Below this, there is a table of contributors with columns for Code, Company name, and Currency. The table lists 9 contributors, including B-Green SA, GothemSA, LuxWind, Aqua Ltd, GreenExport, Blue Danube Power sri, High Tides Inc, and Savannah Inc.

A blue callout box asks: "Are there negative balances where we wouldn't expect them?" Below it, a red flag icon indicates a "RED FLAG #1: Turnover (Revenue) with Negative Consolidated Contribution". A detailed analysis follows, showing a table with columns for Account, Description, Local Amount, and Consolidated Contribution. The table shows a turnover of CHF 0.00, resulting in a consolidated contribution of -€60.00.

The analysis includes the following points:

- Local amount is zero (no revenue recorded in CHF books)
- Manual/Event adjustments: -€60 (reducing revenue)
- Consolidated contribution: -€60 (appears as expense, not income)

Why this is wrong:

- Turnover (credit account, defaultSign = 1) should show positive consolidated contribution (income increases net profit)
- A negative €60 means this is...

At the bottom, there is a 'Validation' section with a 'Run validation' button and a 'Change S' section with radio buttons for 'Confirm', 'Approve', and 'Audit'.

Consolidation Agent

Exception spotting

"Are there negative balances where we wouldn't expect them?"

Surface unexpected negatives earlier in the cycle so nothing reaches signoff as a surprise

Currency & translation review

"Which accounts show the largest translation impact this month?"

Rank FX-driven variances directly from Audit Trail data — focus review time on the accounts that actually moved.

Close review

"Which accounts contribute the most to total assets at the group level?"

Validate group totals and explain what's driving them — no pivot rebuilding or spreadsheet exports

Audit support

"Which accounts have unusually large balances?"

Answer auditor questions from the same governed Audit Trail data Finance uses — fewer PBC requests and spreadsheet exports.

best use cases

LIVE DEMO

Consolidation Agent

Ask consolidation questions in plain language.
Get report-backed answers from your Audit Trail data in seconds.

Prophix One Intelligence Roadmap ⁽¹⁾



FP&A Insights

- ✓ Comment Creation
- ✓ Variance Analysis
- ✓ Predictive Forecasting



FP&A Plus Copilot

- ✓ Data Insights
- ✓ Knowledge Assistant



Platform Wide AI

- ✓ Transaction matching for Account Reconciliation
- ✓ Account Reconciliation & Financial Knowledge Assistant
- ✓ MS Teams & Excel Integration



Agentic AI For FP&A Plus

- ✓ Budgeting Agent
- ✓ Reporting Agent
- ✓ Reconciliation Agent
 - Logic Tracing
 - Formatted Report Creation
 - Planning agent
- Agentic Forecasting
- Modelling Agent: Create & Maintain Models



Autonomous Finance

- ✓ Reconciliation Agent
 - Consolidation Agent
 - MCP connection
 - Board Deck (PPT) Creation
 - Proactive Anomaly Detection & Insights
- Budget Workflow Orchestration
- Close Automated
- Self-managing integrations

Capabilities and Features

What you can do next

Each of these steps will move you closer to the experience you saw today.

Expand your platform

Explore FP&A Plus

Unlock advanced driver-based modelling, expanded scenario planning, and deeper workflow automation — built directly on top of what you use today. **Same data. Same team. Significantly more capability.**



[Download the FP&A Plus comparison guide](#)

Expand your platform

Connect your full platform

Prophix connects planning, consolidation, and reporting into a single environment. Each application you add reduces the number of systems your team has to manage.



[Book a call with your account manager](#)

Have a voice

Join the early access group

Give direct input on the roadmap, test new capabilities before general release, and ensure the product is built around how your team actually works.



This week

Visit the product & design team

We're here at the conference. Come find us, share your experience, and tell us what would make this indispensable for your team.

Your feedback directly shapes what we build next.

You can help shape what is coming next

Your voice helps determine what comes out next.

We're inviting customers to be part of what comes next — not as observers, but as contributors. The experiences you have, the friction you feel, and the outcomes you need are exactly what this product should be built around.

Your experience shapes the product. We're here to listen.

At the conference

Visit the product & design team

Come talk to us directly. Tell us what you need, what's missing, and what would make this indispensable for your team.

Early access group

Influence what gets built next

Join our early access group to give direct input on the roadmap, test new capabilities before general release, and ensure the product is built around how your team actually works.





**Any
questions?**



Thank you



Scan the QR code and complete
the course evaluation to earn
your CPE credit

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Appendix



The Prophix Commitment to Responsible AI

Delivering responsible, transparent, and human-centric AI for finance leaders



Transparency

Clear when AI is used, benefits and limits explained.



Trust

Safeguarding customer data using global security and privacy standards.



Customer Control

You decide when and how to use AI.



Fairness & Equity

Bias testing, guardrails, and equitable outcomes.



Compliance

Certified by TrustArc Responsible AI — aligned with EU AI, NIST, ISO 42001, OECD

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Prophix AI Architecture Overview

"Compare expenses across departments for the last 3 years"



Prophix One Users



Sure, Here is a chart that explains...

Prophix One User Experience

Natural language interface for knowledge, data insights and tasks

aws

Prophix One™
Intelligence

User query resolution and response construction

Prophix One Applications

Provide authorized data in consumable format

Prophix One Data

Secure, private, not used for training models



Bedrock

Managed, pre-trained Foundational Models

Models running AWS used for inference only, pre-trained models provide plan and orchestration to respond to user queries. No data leaves Prophix AWS account.

Privacy



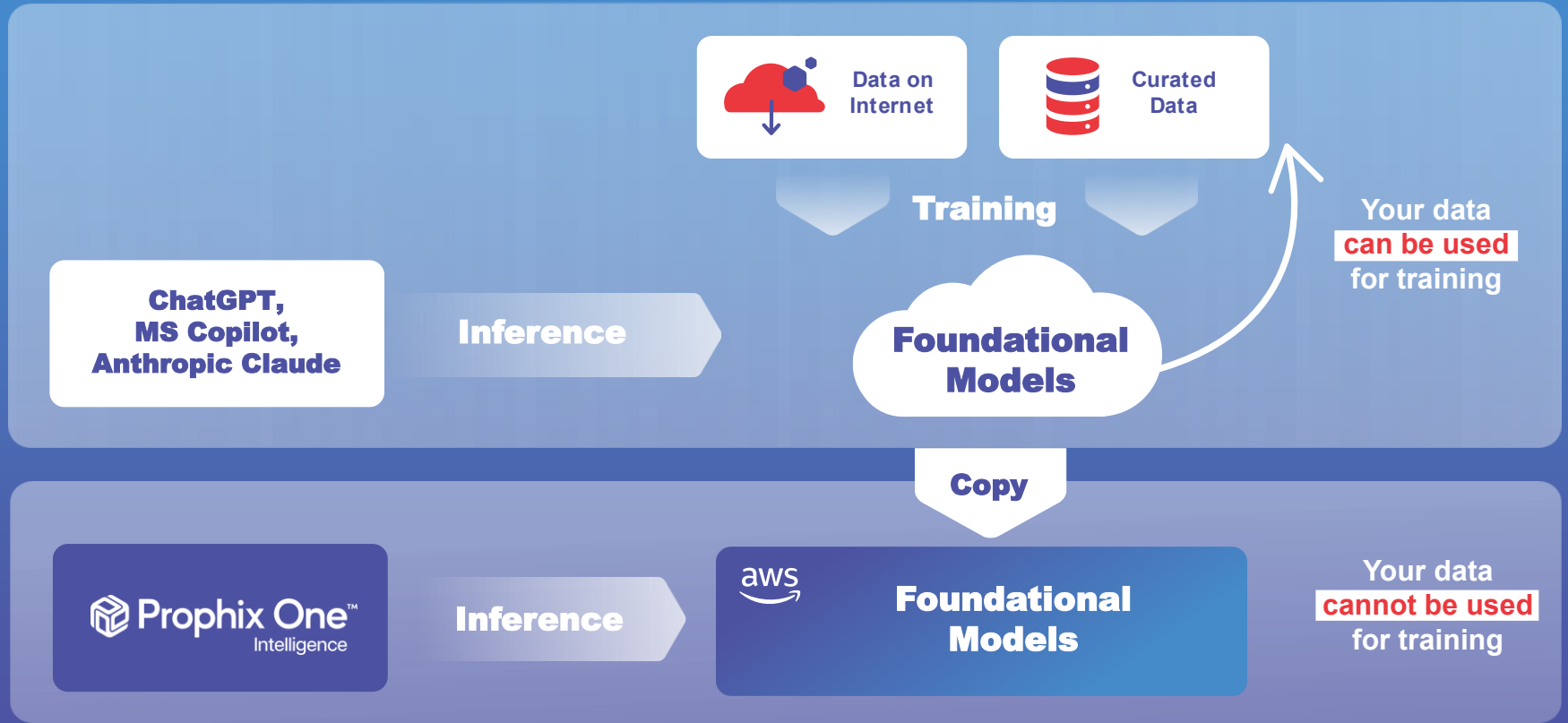
Security



Accuracy

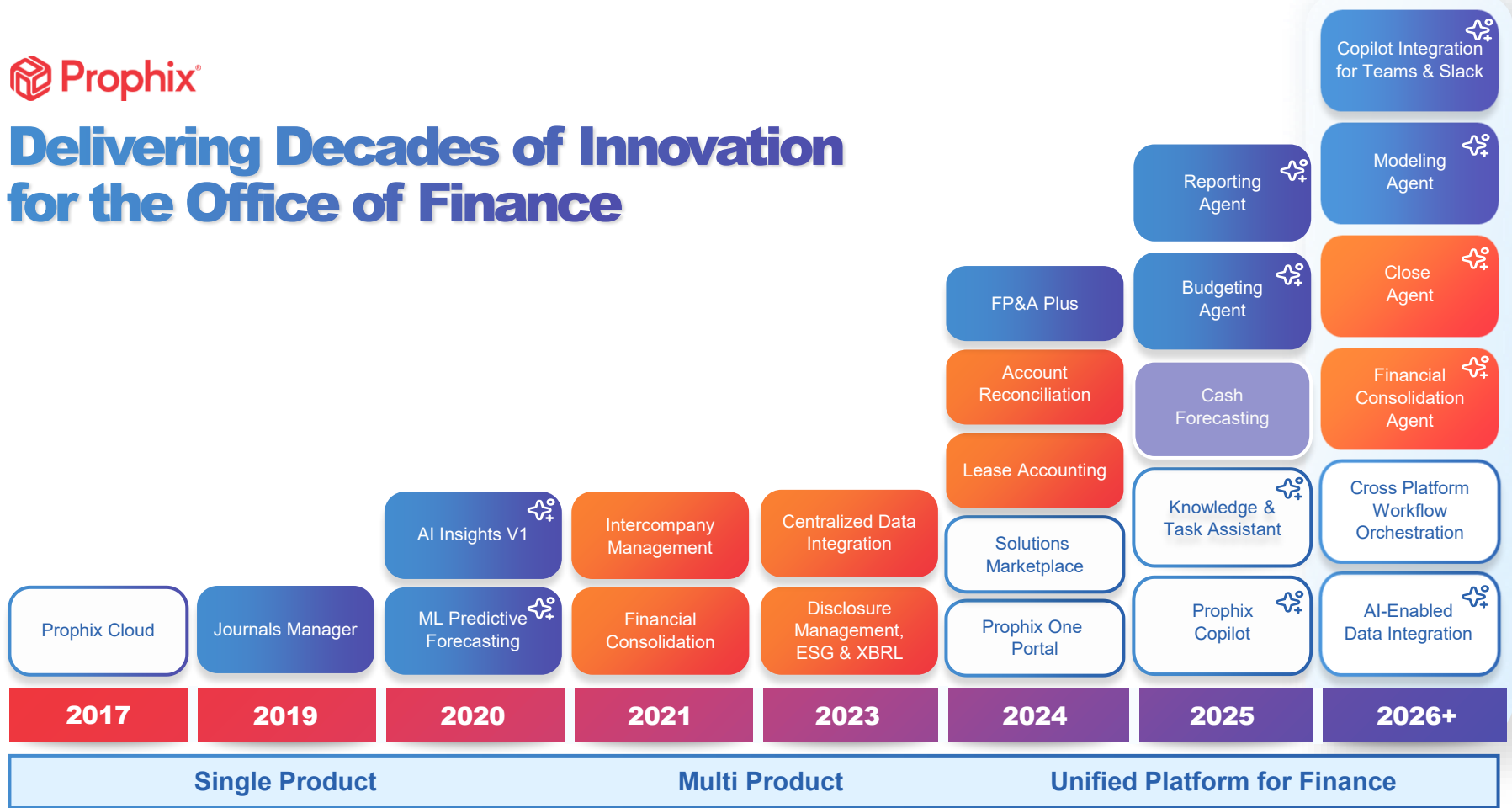


AI in the cloud vs AI in Prophix One





Delivering Decades of Innovation for the Office of Finance



Single Product Multi Product Unified Platform for Finance