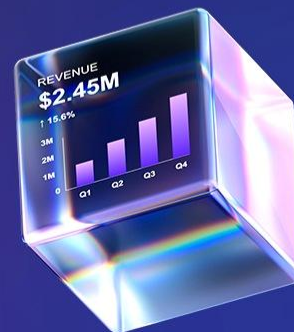




Autonomous Finance Realized

Welcome to the Delegation Era



The Future of Reporting & Analysis in FP&A

Pako Chan

Principal Product Manager, Prophix

Finance teams are drowning in data AND starving for insight

Finance teams spend 46% of their time collecting and validating data, and only 35% on analysis that drives decisions.*

FP&A Plus, Prophix's next-generation reporting and analytics platform, was built to close that gap.



Replace this slide



Open Menti to edit



What's the single biggest reporting challenge you face today?

Responses can be up to 200 characters and will appear here.

You can group responses if you get more than 10.

Turn on voting so people can flag their favorite responses.



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Waiting for participants

Responses are hidden

→ Show responses



The FP&A job has fundamentally changed

Three forces are reshaping FP&A reporting.

More complexity

More data sources, more dimensions, more stakeholders. Finance teams are asked to cover more ground every year. 96% still rely on spreadsheets to manage it.*

Faster decisions

Monthly reporting is too slow when the business is moving weekly, sometimes daily.

Explain, not just report

Stakeholders want the why, the impact, and the recommended action. Numbers on a page aren't enough.

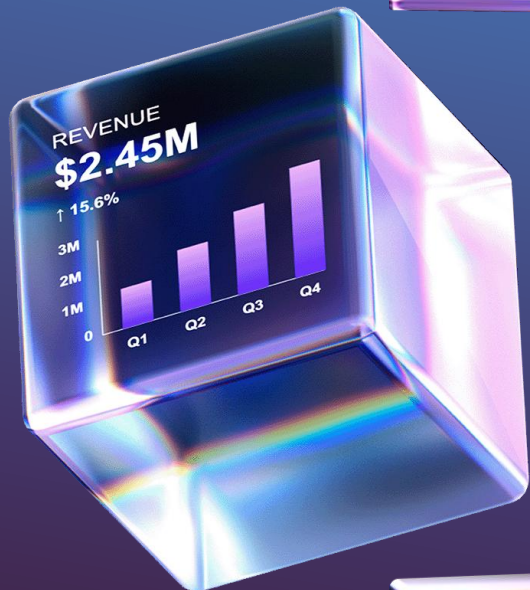


What we'll cover today

The evolution of reporting

Vision demo: From variance to action

Where we're headed next



What's new for reporting and analysis in Prophix



Three capabilities finance teams have been asking for

All available in FP&A Plus

Richer visualization

Dashboards become decision-making hubs, not just status pages.

Self-service controls

Business users answer their own questions without waiting on admins.

Scale that matches your business

More accounts, more dimensions, more data. No simplification required.

[PRODUCT DEMO >>>](#)

Dashboards are becoming your decision-making hub

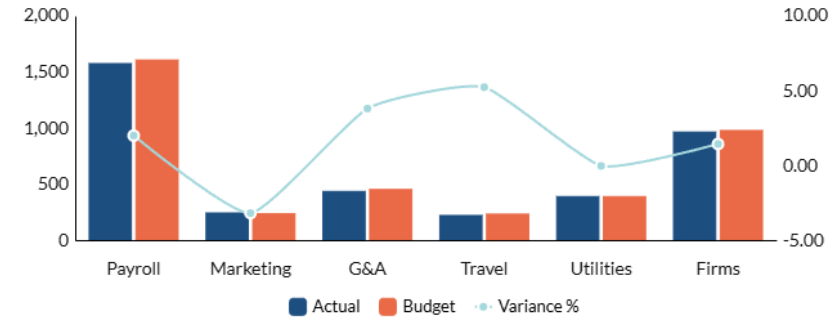
New look, new tile types, new chart types.

What's new:

- Multi-value Badge tile
- Table tile
- Secure-URL dashboard sharing



OpEx Variance (000's)



Top 15 Expenditures

	Actual	Budget	Variance	Variance %	PY Actual	YoY G
Employee Salaries	1,426,920	1,456,041	29,121	2	1,308,201	11
Audit & Accounting	238,736	249,502	10,766	4	224,177	1
Information Technology	220,039	220,327	288		203,923	1
Professional Development	188,433	197,446	9,012	5	173,918	1
Legal Services	174,040	170,024	-4,016	-2	159,560	1
Telephone, Fax, T1 lines	162,699	154,964	-7,735	-5	149,494	1
Janitorial Services	143,049	141,056	-1,993	-1	132,124	1
Hydro	111,488	115,617	4,129	4	102,691	
Advertising	109,521	92,618	-16,904	-18	71,960	3
Equipment Maintenance ...	102,206	104,751	2,545	2	96,751	
Benefits	101,374	103,443	2,069	2	92,940	
Airfare	100,665	108,150	7,485	7	93,089	
Office Expense	94,304	94,854	550	1	87,617	
Lodging	93,342	97,625	4,283	4	90,073	
Relocation Expenses	91,751	95,946	4,195	4	84,301	

More ways to visualize, more control over how it looks

Three capabilities coming together.

More chart types

S-curve for trend analysis, heat map for spotting patterns across dimensions. The right visual for the right financial question.

Reusable styles

Save chart styles and apply them across every tile. Visual consistency without manual work.

Custom colors

Your palette, your brand. Custom color support for charts and dashboards gives you full control over visual identity.

Give your team the power to answer their own questions

Three self-serve capabilities in FP&A Plus

Filters Manager

Dynamic, reusable member groups that update every connected report and dashboard instantly. Update one filter and 20 department reports refresh. Euclid: 100 static sets reduced to 20 dynamic filters, zero rebuild effort.

Formula transparency

The Table tile formula bar shows how any displayed value was calculated. Launch directly into Ad Hoc Analysis to go further. Users self-discover results without asking an admin.

Reporting Agent

Ask questions about financial data in plain language. The Reporting Agent builds tables and charts, surfaces variance commentary, and suggests next analytical directions. No report-building required.

Your models can grow as fast as your business does

FP&A Plus scales across every dimension that matters.

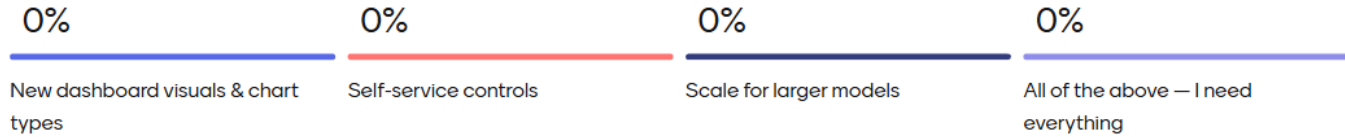
Capacity

- 100,000+ accounts.
- 200,000+ dimension members.
- 300,000,000+ fact table records.
- Unlimited standard models.

Performance

- Dedicated model resource processing via the Infinix engine.
- No more simplifying your model to fit the tool.
- Richer, more granular reports without trade-offs.

Which reporting enhancement matters most to your team?



→ Show responses

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Waiting for participants

Responses are hidden ×



From variance to action in one workflow

Meet Meridian Cloud Solutions

Fictional mid-market B2B SaaS. Mid-March 2026. Budget finalized. February close complete.

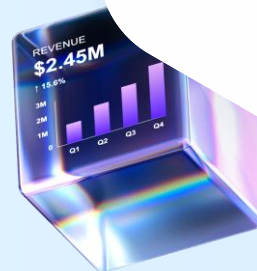
- ~\$190M annual planned revenue. Three NA SaaS tiers:
- Enterprise (~62% of NA SaaS plan, avg \$400K annual revenue),
 - Mid-Market (\$120K annual revenue), and
 - SMB (\$35K annual revenue).

Enterprise carries the highest gross margin.

The CFO is aware of the macro environment: interest rate uncertainty, cautious enterprise budgets.

What she does not know yet: three of their largest Enterprise opportunities have stalled in the field.

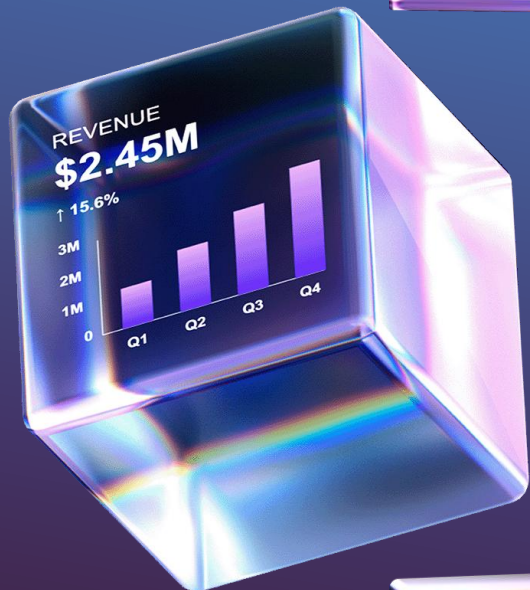
And FP&A Plus has been tracking a building trend in March actuals that points to a significant miss against budget.



Let me show you the vision

VISION PROTOTYPE

5 phases: Detect → Explain → Decide → Act + Validate → Distribute



Detect

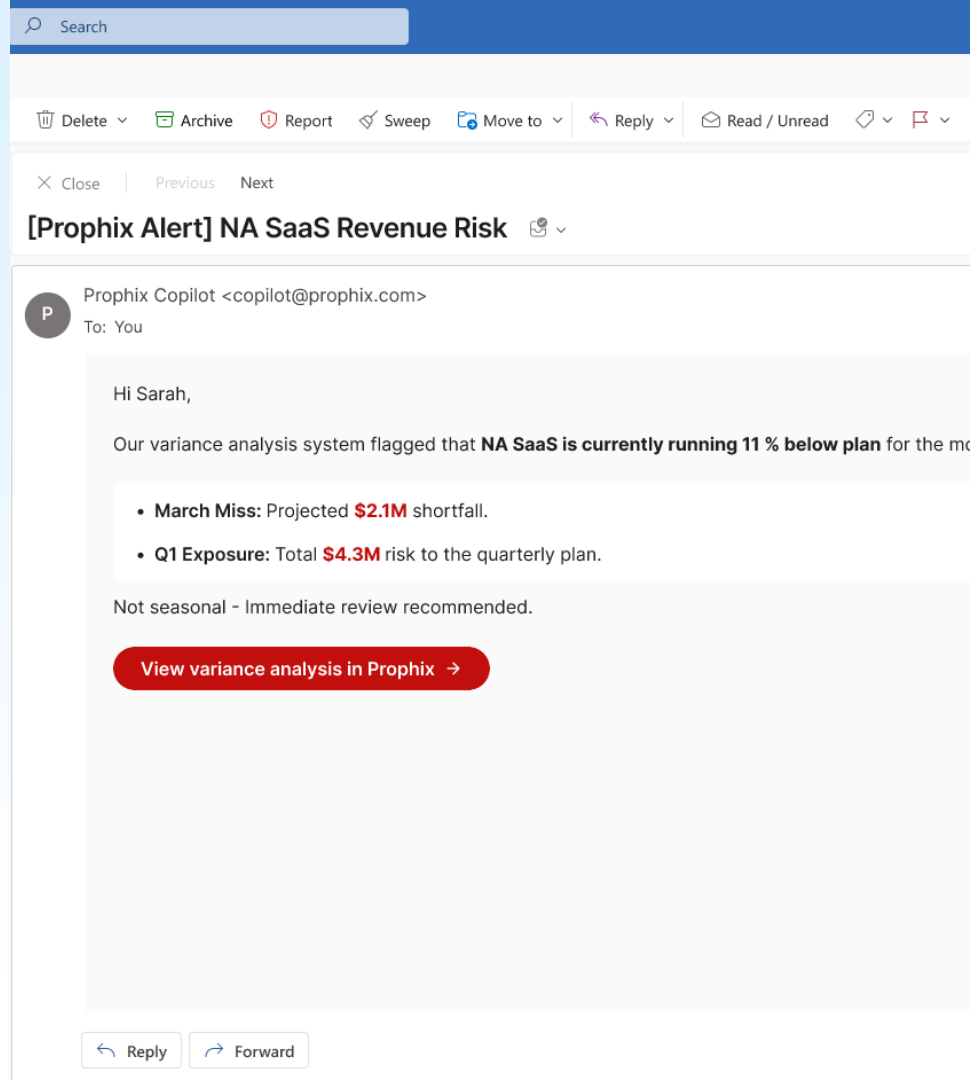


The system knew before she did.

Proactive email notification.

Prophix Copilot proactively alerts the CFO when a variance is detected mid-period, before month-end close and before anyone runs a report.

The email includes headline metrics, confidence level, and a direct link into the full variance analysis in FP&A Plus.

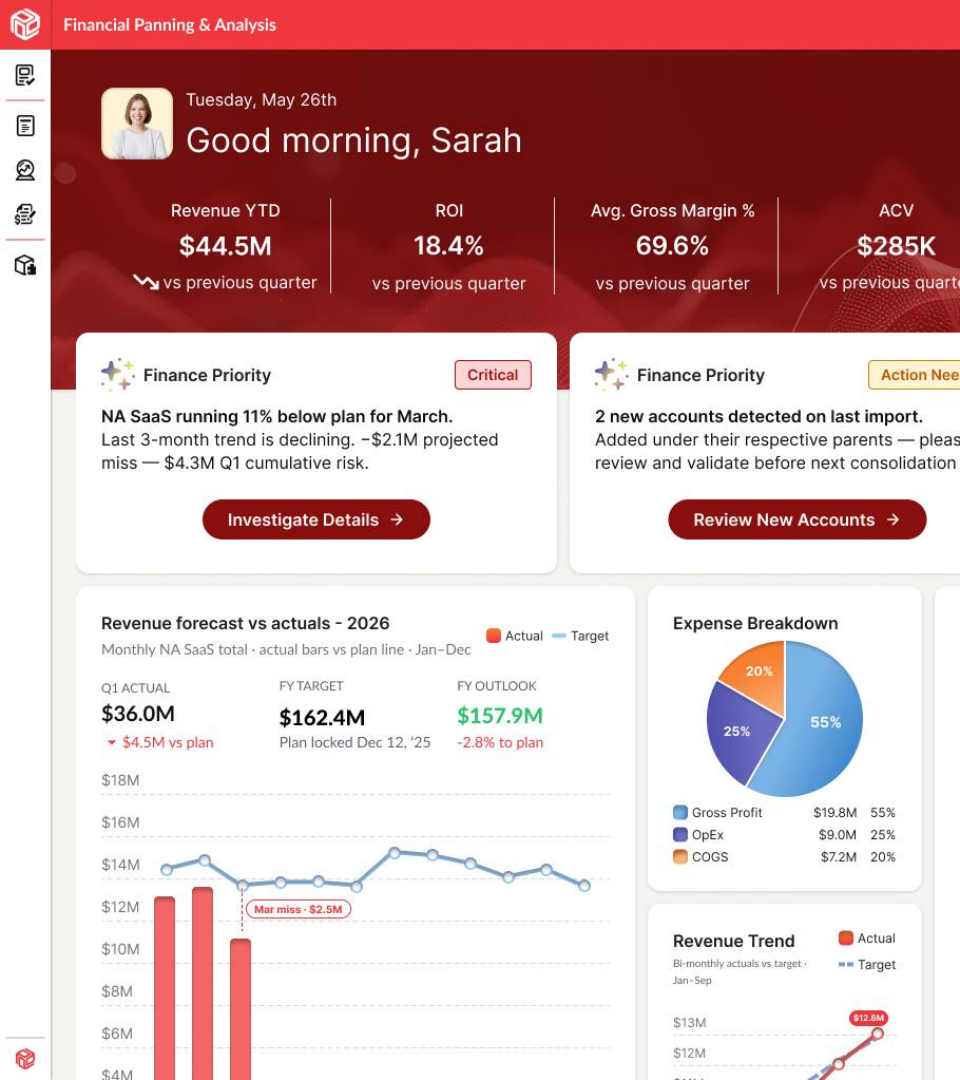


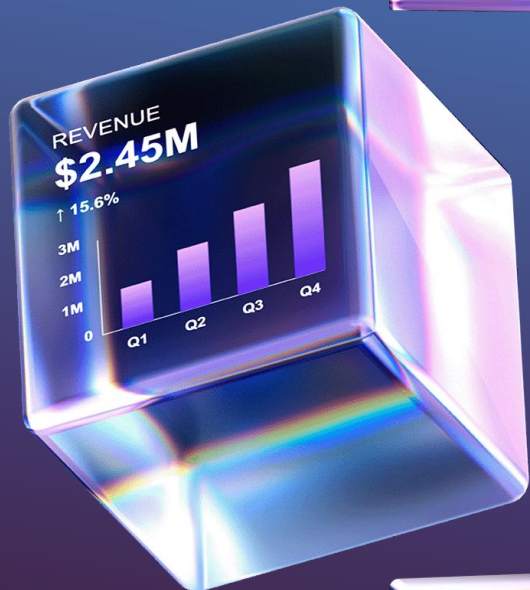
One critical tile, one click to investigate

FP&A Plus Dashboard, Critical variance tile.

The FP&A Plus dashboard surfaces the variance as a Critical tile with severity badge, declining trend chart, and a direct link to the source forecast version.

Traceability is visible before investigation begins. One click opens the full variance report.





Explain

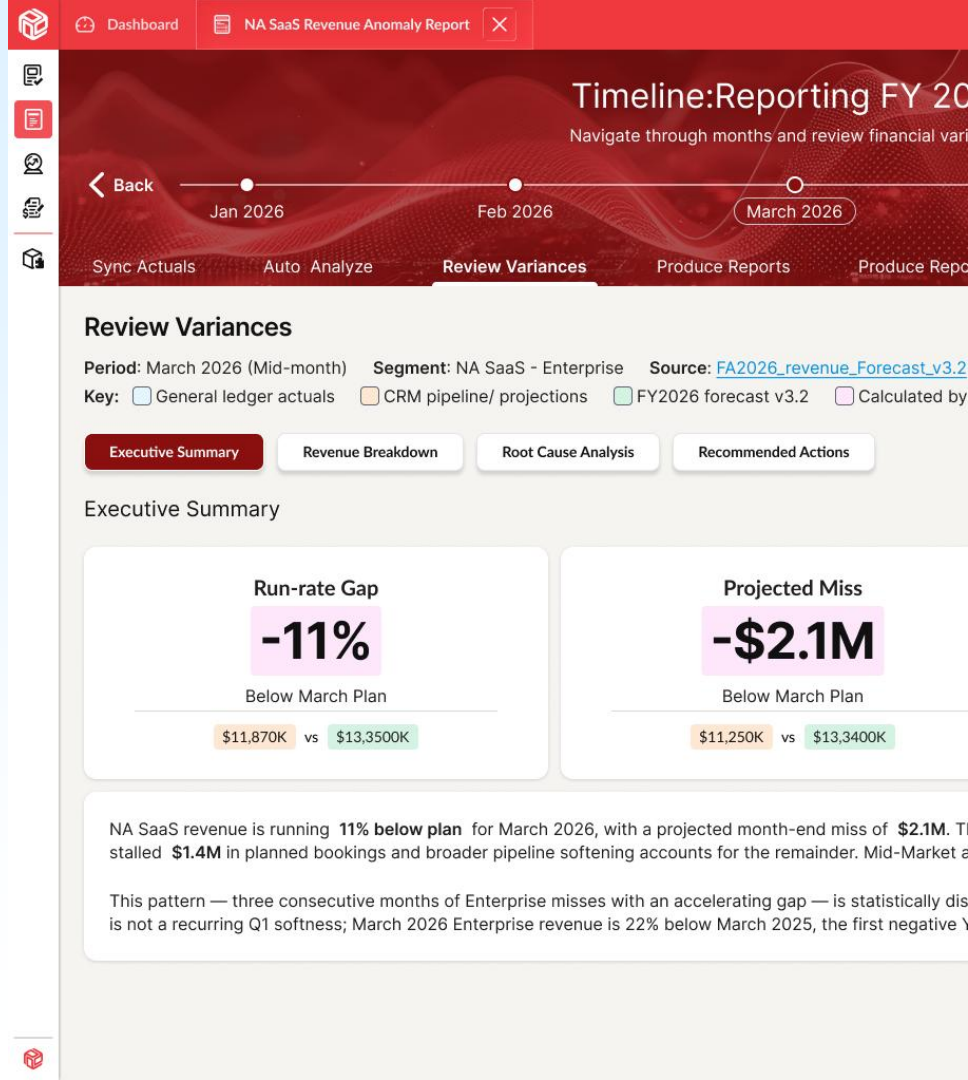


Everything the CFO needs before she goes deeper.

Prophix Copilot variance report, Executive Summary tab.

Prophix Copilot surfaces an Executive Summary the moment a variance is flagged: three headline metric cards give scale instantly, and a concise narrative explains what happened and why.

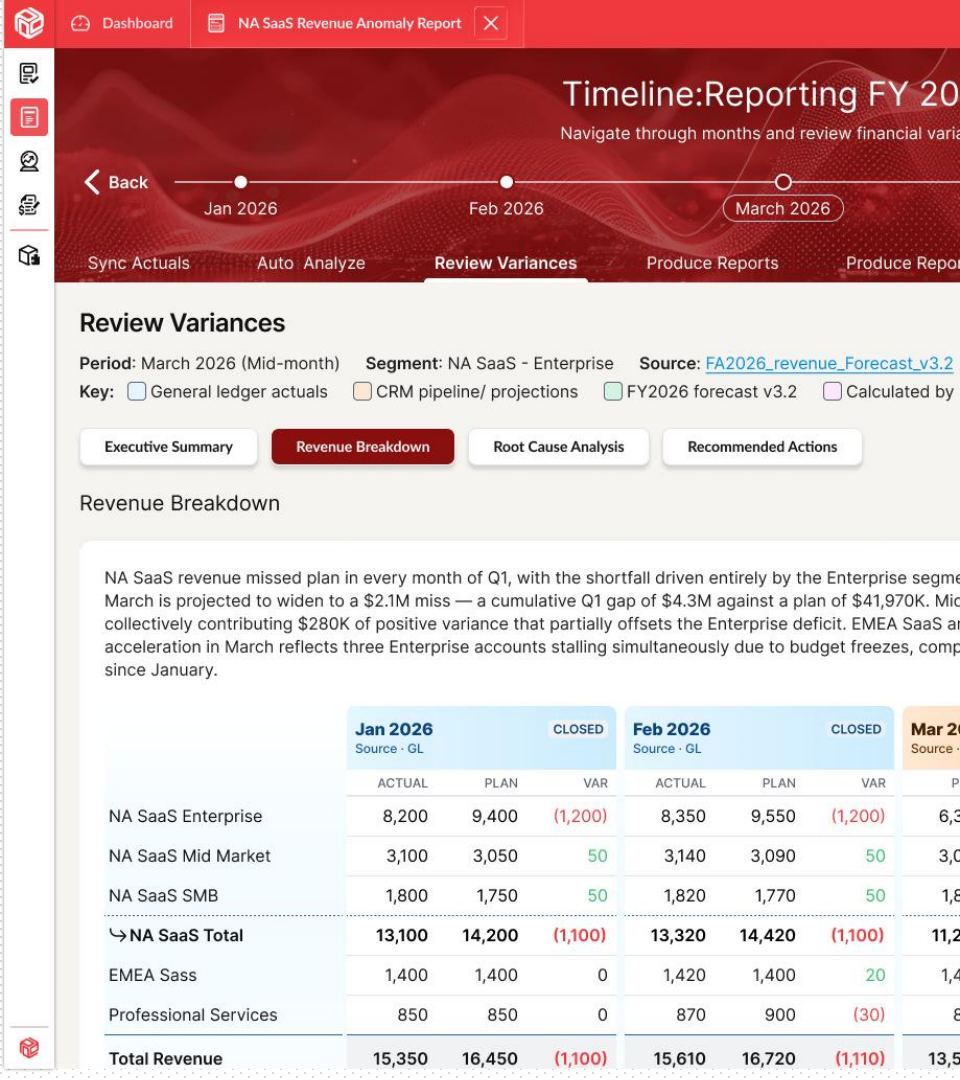
A CFO can read, understand, and forward it without editing.



The detail behind the headline numbers.

Revenue Breakdown tab.

The Revenue Breakdown tab gives the CFO full control through a chart dropdown: segment comparison, trend analysis, and raw data table, each with a clear talking point.

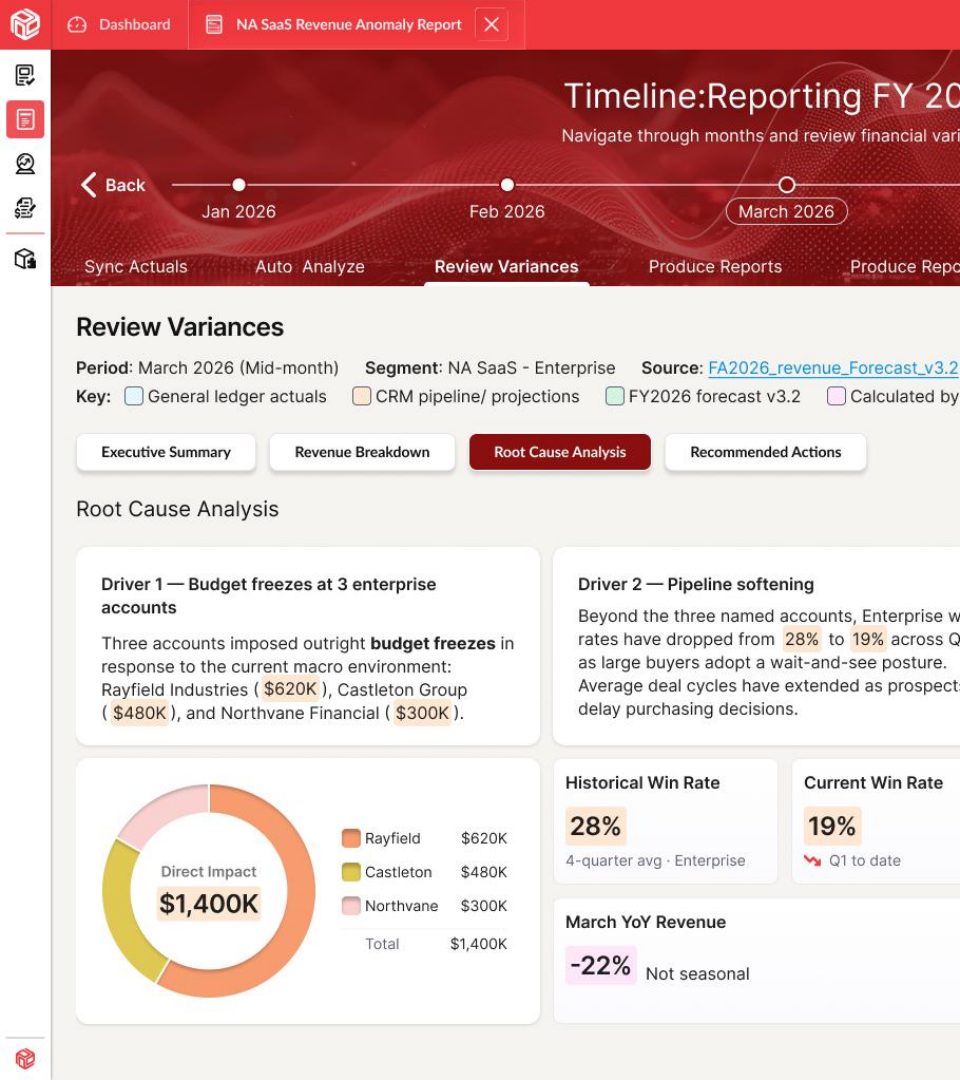


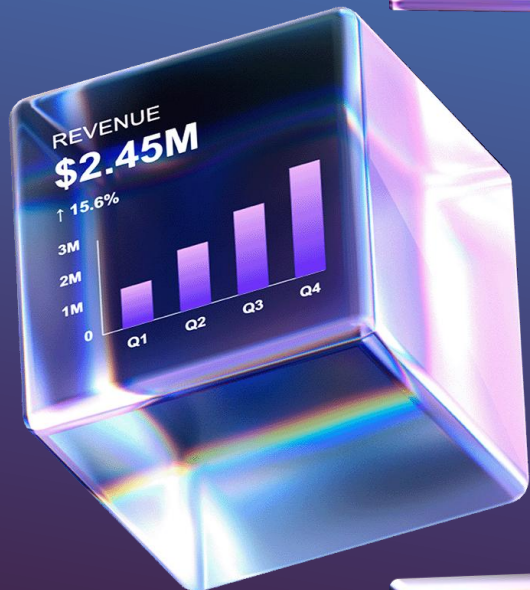
From numbers to narrative: the why behind the miss.

Root Cause Analysis tab.

The Root Cause Analysis tab pre-decomposes the variance into named drivers with supporting visualizations: direct impacts, pipeline win rate changes, and a YoY seasonality check.

Analysis that would take a senior analyst half a day is pre-built and fully traceable to source data.





Decide



The next steps, with the math already done.

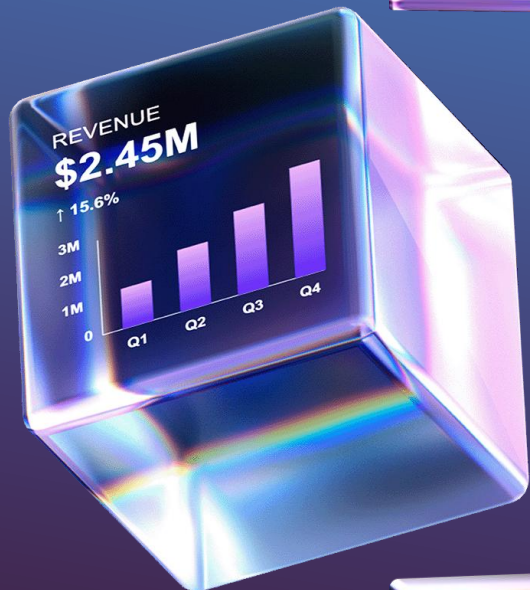
Recommended Actions tab.

Prophix Copilot translates the variance analysis into specific, numbered recommendations, each with exact dollar impact already calculated.

Clicking any recommendation navigates directly to the forecast template with Copilot ready to act.

The report stays read-only; all actions are deliberate and fully traceable.

The screenshot displays the Prophix Reporting Agent interface. At the top, there are navigation tabs for 'Dashboard' and 'NA SaaS Revenue Anomaly Report'. A sidebar on the left contains several icons. The main content area features a 'Timeline: Reporting FY 2026' header with a navigation bar for months (Jan 2026, Feb 2026, March 2026) and a 'Back' button. Below the timeline, there are tabs for 'Sync Actuals', 'Auto Analyze', 'Review Variances' (selected), 'Produce Reports', and 'Produce Reports'. The 'Review Variances' section includes a 'Period: March 2026 (Mid-month)', 'Segment: NA SaaS - Enterprise', and 'Source: FA2026_revenue_Forecast_v3.2'. A 'Key' section allows filtering by 'General ledger actuals', 'CRM pipeline/ projections', 'FY2026 forecast v3.2', and 'Calculated by'. Below this are buttons for 'Executive Summary', 'Revenue Breakdown', 'Root Cause Analysis', and 'Recommended Actions' (highlighted in red). A 'Recommend Actions' section contains a note: 'Note: The following actions have been identified by Prophix Reporting Agent based on this analysis. To take action, use the...'. Two action cards are visible: '01 Escalate 3 stalled Enterprise accounts' and '02 Revise Apr-May Enterprise forecast by -8%'. The first card details the need to escalate accounts for Rayfield Industries (\$620K), Castleton Group (\$480K), and Northvane Financial (\$300K), with a 'Potential Q1 recovery' and an 'Escalate now' button. The second card details a forecast adjustment of -\$1,360K for April and May, with an 'Apply adjustment' button.



Act + Validate



Copilot made the edit. Every detail is traceable.

Template view + Copilot action + commentary

Prophix Copilot applies the forecast adjustment and highlights every changed cell in green.

A right-click on any cell opens the full Data History: original value, who made the change, when, and which recommendation authorized it.

Copilot drafts executive commentary in the same screen: editable, version-controlled, and linked to the source analysis.

The screenshot displays a financial reporting tool interface. At the top, the title bar reads "026 Revenue Forecast_v3.2_Revised" with a close button. The main header area shows "May revised" and "Data Entry Mode". Below this, it indicates "(via Prophix Copilot)" and "Source: NA SaaS Revenue Anomaly |". A "Auto refresh" toggle is set to "On".

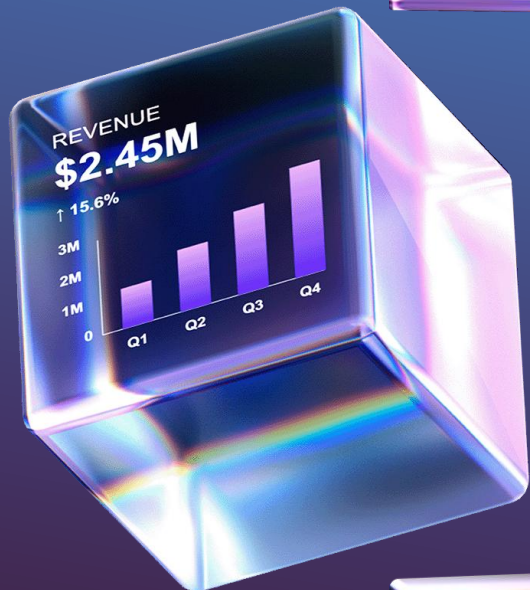
The central part of the interface is a table with the following data:

Feb 2026		CLOSED	Mar 2026		CLOSED	Apr
Source - GL			Source - GL			Source
ACTUAL	vs PLAN		PROJ	vs PLAN		
8,350	(1,200)		6,320	(2,180)		
3,140	50		3,080	30		
1,820	50		1,850	50		
13,320	(1,100)		11,250	(2,100)		

On the right side, there is a "Reporting Agent" panel. It shows "Action 2 selected — Revise Apr/May enterprise forecast". Below this, a message states: "I have applied 8% as suggested to April and May. You can make adjustments directly in the template or you can tell me and I can make them for you." A dropdown menu shows "FY2026_Revenue_Forecast_v3.2_Revised" with the subtext "Apr-May columns updated".

Below the dropdown, it says "2 actions still open — escalation and commentary." and a button "Add executive commentary." is visible. A "Draft commentary" section follows, with the text: "I've drafted commentary based on the anomaly report and actions taken. Review, edit if needed, then approve to add it to the report." The draft commentary text reads: "NA SaaS Enterprise has declined three consecutive months as macroeconomic uncertainty weighs on Enterprise spending. Budget freezes at Rayfield Industries (M&A financing pressure), Castleton Group (CFO cost mandate), and Northvane Financial (spending review) have stalled \$1.4M in planned bookings. Broader Enterprise pipeline softening accounts for the remaining gap. Q1 cumulative NA SaaS shortfall: \$4.3M (\$41,970K plan vs \$37,670K projected). Apr-May Enterprise forecast reduced 8% (\$8,500K → \$7,820K/month, -\$1,360K total). All three stalled accounts escalated to sales leadership."

At the bottom of the panel, it says "1 action open — escalation." and a search bar "Ask a question or make a request." is present. The footer of the interface reads "AI-generated. Check your results. v30.0.0".



Distribute



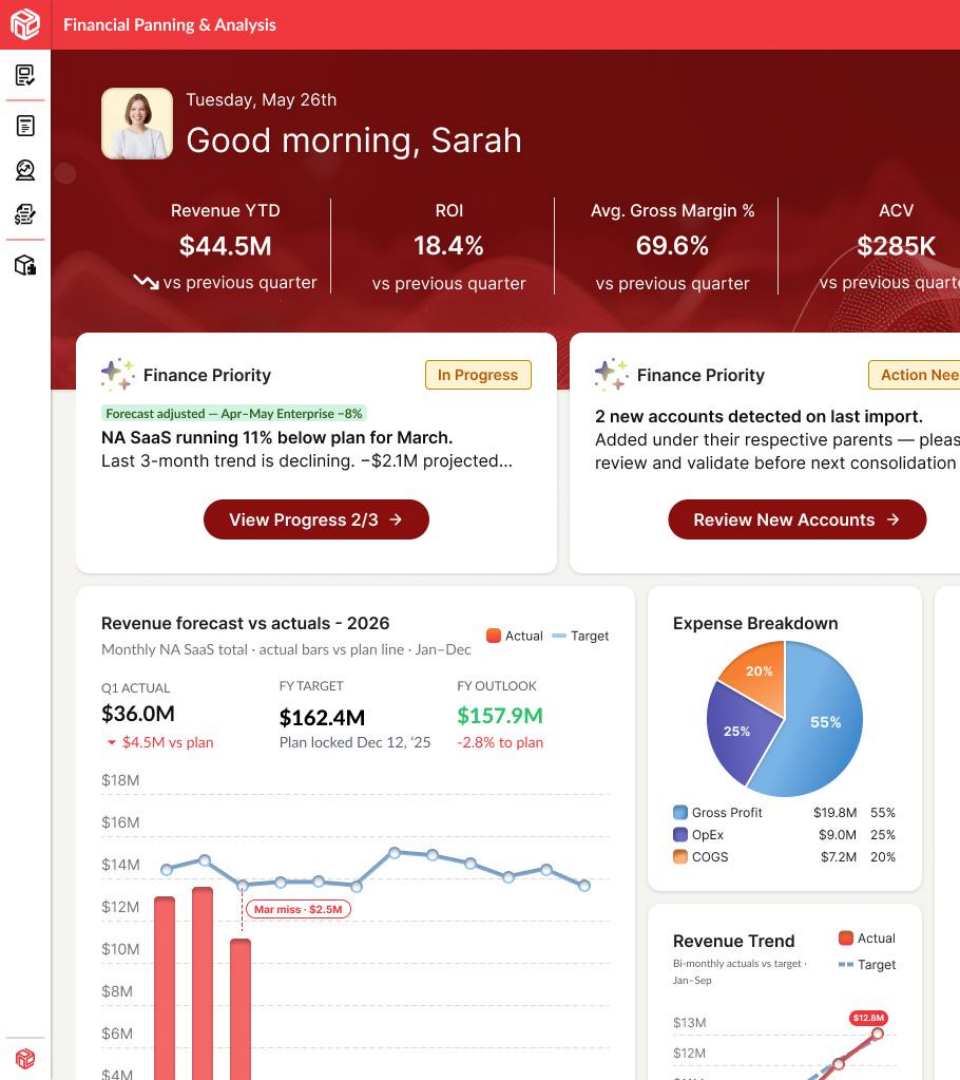
The forecast updated. The manager notified. Nothing left to copy- paste.

Dashboard update and manager notification.

The variance tile updates to show action progress without disappearing. Accountability is maintained until all recommendations are resolved.

The revised forecast propagates to a new dashboard tile automatically.

Prophix Copilot triggers a manager notification with the forecast change summary and links to the source variance report.



One variance. Connected forecast. Full audit trail. Stakeholder informed.

No switching tools. No copy-pasting.

One governed source.



In your current daily workflow, how long does it take your team to go from identifying a variance to correcting the forecast?



- Same day — we catch it in near real-time
- 1-3 days — someone spots it in a weekly review
- 4-7 days — it surfaces in a standing meeting or report cycle
- 1-2 weeks — we find it in the monthly close
- End of quarter — by then it's already in the actuals



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Waiting for participants

Responses are hidden ×

When AI generates a recommendation, what level of detail in the explanation do you need in order to trust the AI response before acting on it?



- Just the headline number and recommended action
- A short rationale — 2-3 sentences explaining why
- The root cause and which data sources drove it
- Full breakdown — root cause, confidence level, and downstream P&L impact
- I'd need a human finance lead to validate it regardless of explanation

→ Show responses

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Replace this slide



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Responses are hidden ×



What's the biggest barrier to trusting AI-generated outputs?



- Data quality — our source data isn't clean or complete enough
- Auditability — we need a clear trail showing how every number was produced
- Change management — finance teams won't change their existing review process
- Human sign-off — leadership won't accept outputs that haven't been reviewed by finance
- Zero tolerance for error — one wrong AI number in a board report is unacceptable

Turn off responses

→ Show responses

Mentimeter

SB

Replace this slide



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Responses are hidden ×



The future of FP&A reporting is autonomous, AI-augmented, and fully auditable

Three pillars define where we're headed.

Autonomous detection

A variance that used to take an analyst 30 minutes to find surfaced in Sarah's inbox at 8am before she logged in. That is the direction of travel for every finance team.

AI-augmented action

Copilot made the forecast adjustment. Sarah decided whether to apply it. That line between AI execution and human judgment is the design principle behind everything we build.

Always auditable

Right-click any cell. See who changed it, when, why, and which analysis authorized it. For a CPA, that is not a feature. It is the condition for trusting AI at all.

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.



[Book a 1:1 meeting with the product team](#)

Your feedback directly shapes what we build next.

Thank you



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Pako Chan
Principal Product Manager
pchan@prophix.com

www.Prophix.com