



Transforming Finance, Tax & Accounting

With AI, Automation, & Agentic Workflows

Your Guide to Resource Optimization, AI Governance, & Workflow Efficiencies

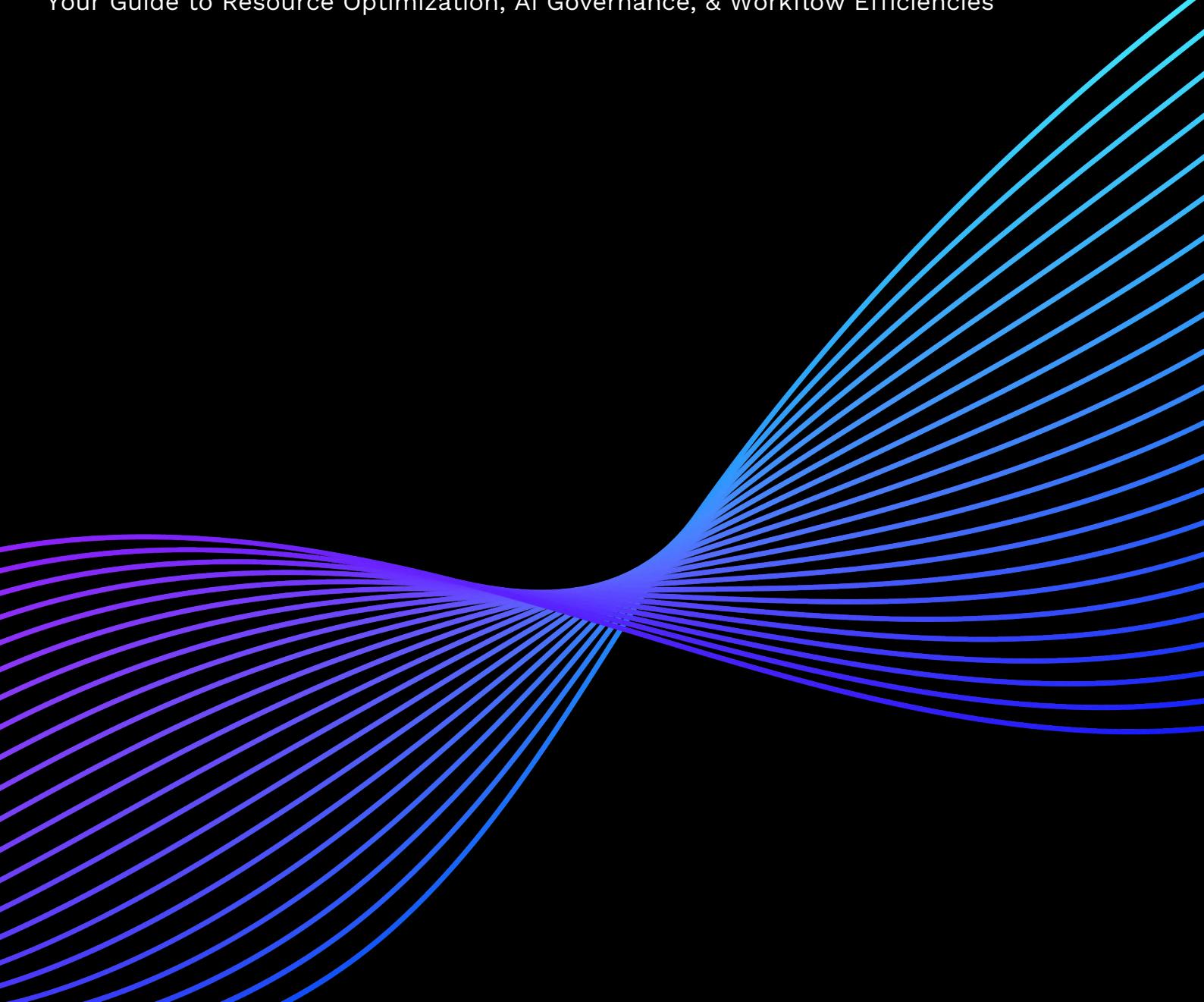


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Transforming Your Finance Workflows With AI, Automation and AI Agents

If you're a VP or Director of Finance, Tax, or Accounting, your mandate is clear: Do more with less. Stay compliant. Move fast. Adopt AI — responsibly.

But your team is buried in spreadsheets, reconciliation challenges, and outdated tools. The real risk? Falling behind competitors who are already automating.

62% of finance leaders say automating reconciliation and anomaly detection is the most important step toward smarter, faster accounting

KPMG, 2024.

Nearly 60% of finance organizations are automating core processes to stay competitive

Gartner, 2024.

Manual processes aren't just inefficient — they're a liability.

Forward-thinking finance and accounting teams have cracked the code and treat automation and agentic workflows as a mandate. They improve efficiency, control costs, optimize resources, and strengthen compliance with AI, automation, and agentic workflows.

This guide highlights five real-world use cases where Fortune 1000 teams replaced bottlenecks with Savant's AI, automation and agentic platform — and saw transformational results.

Top Finance Workflows Ideal for Modernization

1

Accelerate intercompany reconciliation

Automate account assignments, transaction categorization, and reporting to streamline reconciliations across entities.

2

Simplify asset and liability reconciliation

Merge, consolidate, and validate data from varied sources—Excel, NetSuite, Oracle, and more — using structured workflows.

3

Automate month-end cost assurance

Reduce time spent on month-end processes by automating key tasks like data mapping and processing to ensure accuracy and compliance.

4

Streamline sales tax calculation and compliance

Simplify multi-jurisdictional tax calculations for consistent, accurate reporting and reduced compliance risks.

5

Resolve sales tax discrepancies

Identify and resolve discrepancies by state or city, ensuring accuracy and simplifying multi-regional reporting.

Fast-Track 5 Finance Workflows With AI



Let's review the five common finance, accounting, and tax workflows that improve when automation replaces manual effort and legacy platforms. Intercompany reconciliations finish sooner. Asset and liability reconciliations move with less friction.

Month-end cost assurance closes on schedule. Multi-jurisdiction sales-tax calculations stay accurate. Sales-tax discrepancies often surface early and are resolved quickly. Individually or together, these examples demonstrate how AI-powered analytics automation shortens cycle times, lowers risk, and frees teams for higher-value analysis.

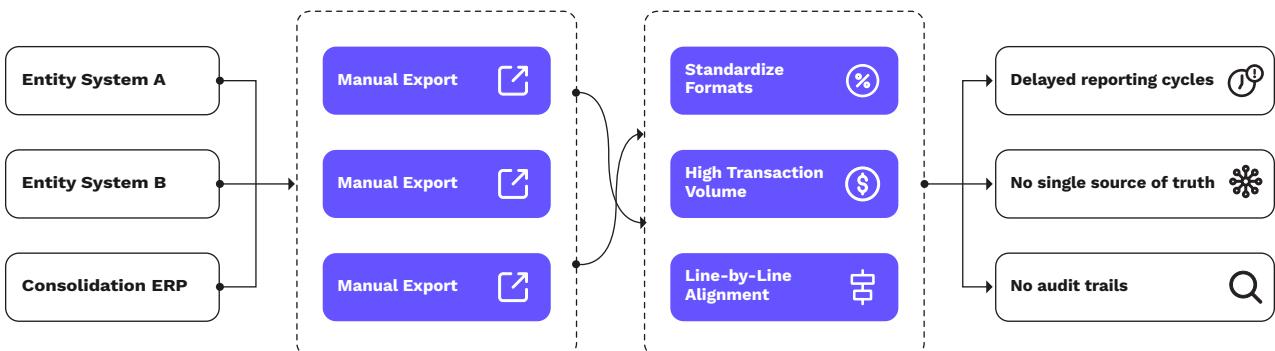
USE CASE

INTERCOMPANY RECONCILIATION

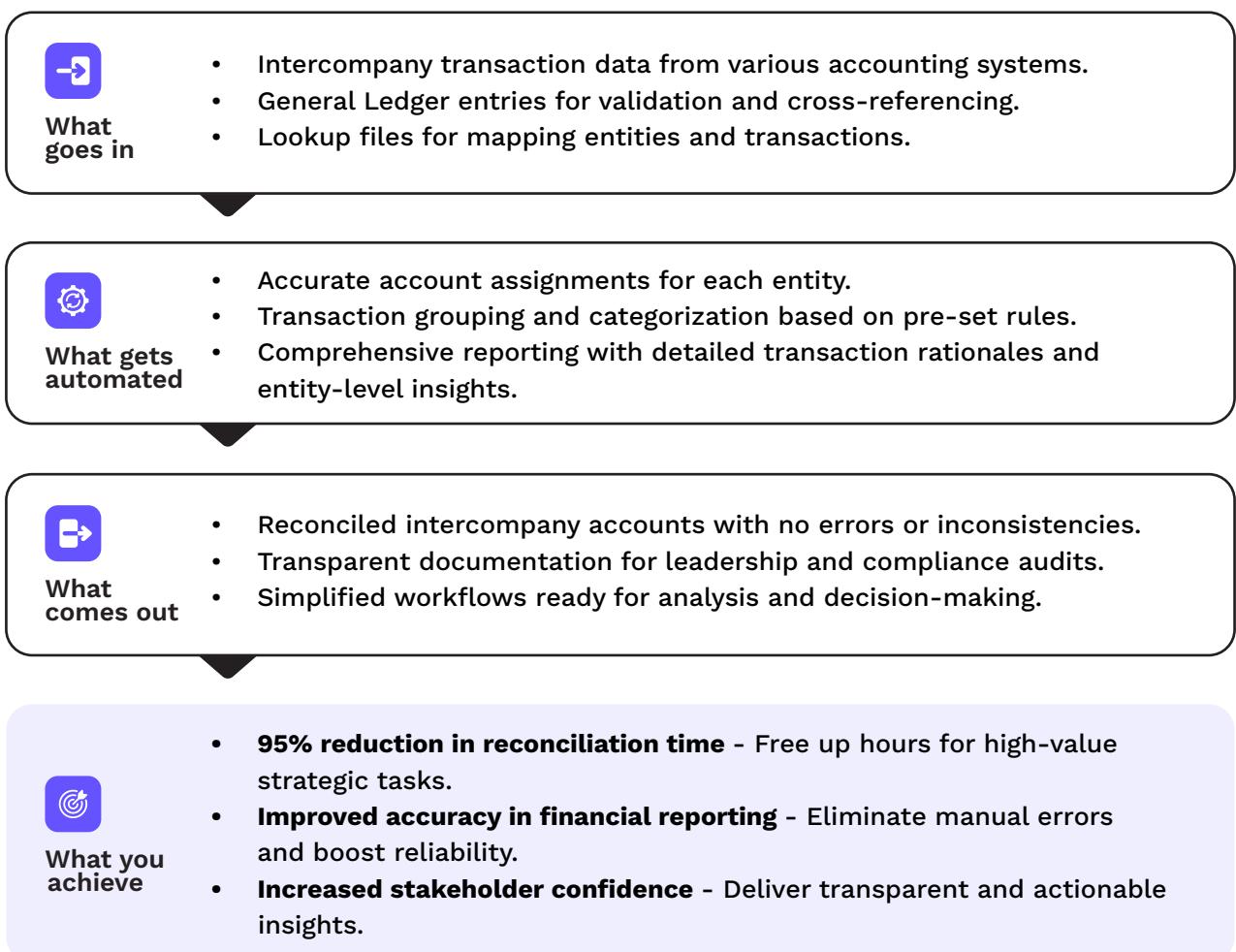
INTERCOMPANY RECONCILIATION

Reconciling intercompany transactions is a complex process, often hindered by fragmented data systems, mismatched entries, and compliance pressures. Teams must navigate inconsistent formats, high transaction volumes, and delayed reporting cycles, all while ensuring accuracy for audits and financial statements.

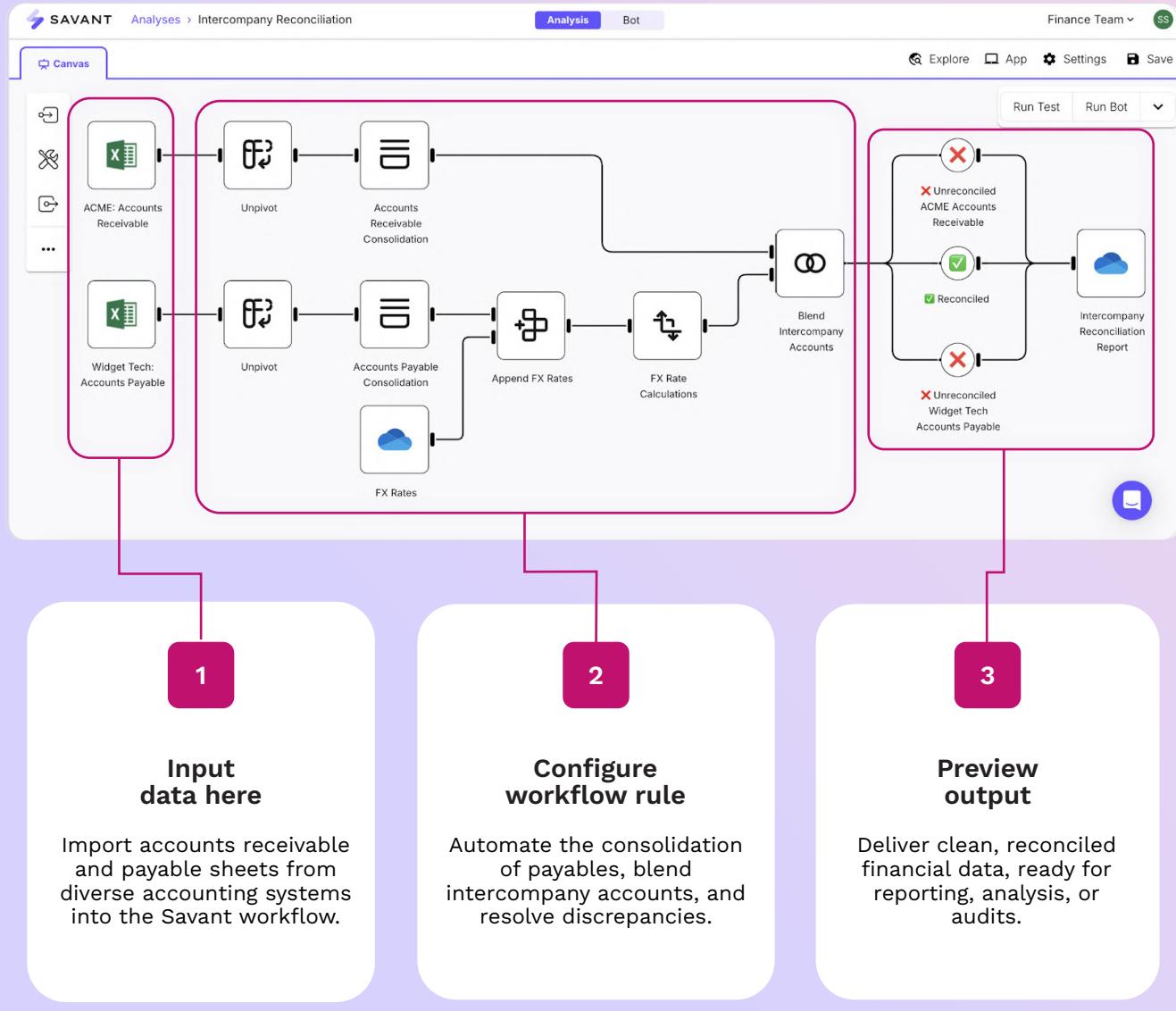
Savant addresses these pain points by automating reconciliation workflows, resolving inconsistencies, and delivering transparent, audit-ready reports.



Savant Transforms Intercompany Reconciliation



Savant Reduces Intercompany Reconciliation Time and Risk



Savant's Key Features:

- **Data ingestion** from ERPs, subledgers, data lakes, and files from multiple entities (SAP, Oracle, Workday, NetSuite, etc.).
- **Transform tool** normalizes and standardizes data across different formats, currencies, and chart-of-account structures.
- **Matching Logic Builder** performs lookup logic.
- **Exception handling and workflow automation** routes unmatched items to correct users for review with contextual metadata.

- **Intelligence Graph™** creates a shared metadata layer that links intercompany transaction attributes, entity relationships, and logic across workflows.
- **Currency conversion & time zone adjustments** automate FX rate application for reconciling intercompany balances in different currencies.
- **AI Agents** explain variances, summarize reconciliation outcomes, or recommend matching rules based on past resolutions.
- **Push results** to Excel, Tableau, Power BI, Snowflake, or journal entry modules in ERPs.
- **Audit-ready governance layer** has full versioning, approval workflows, and access control.

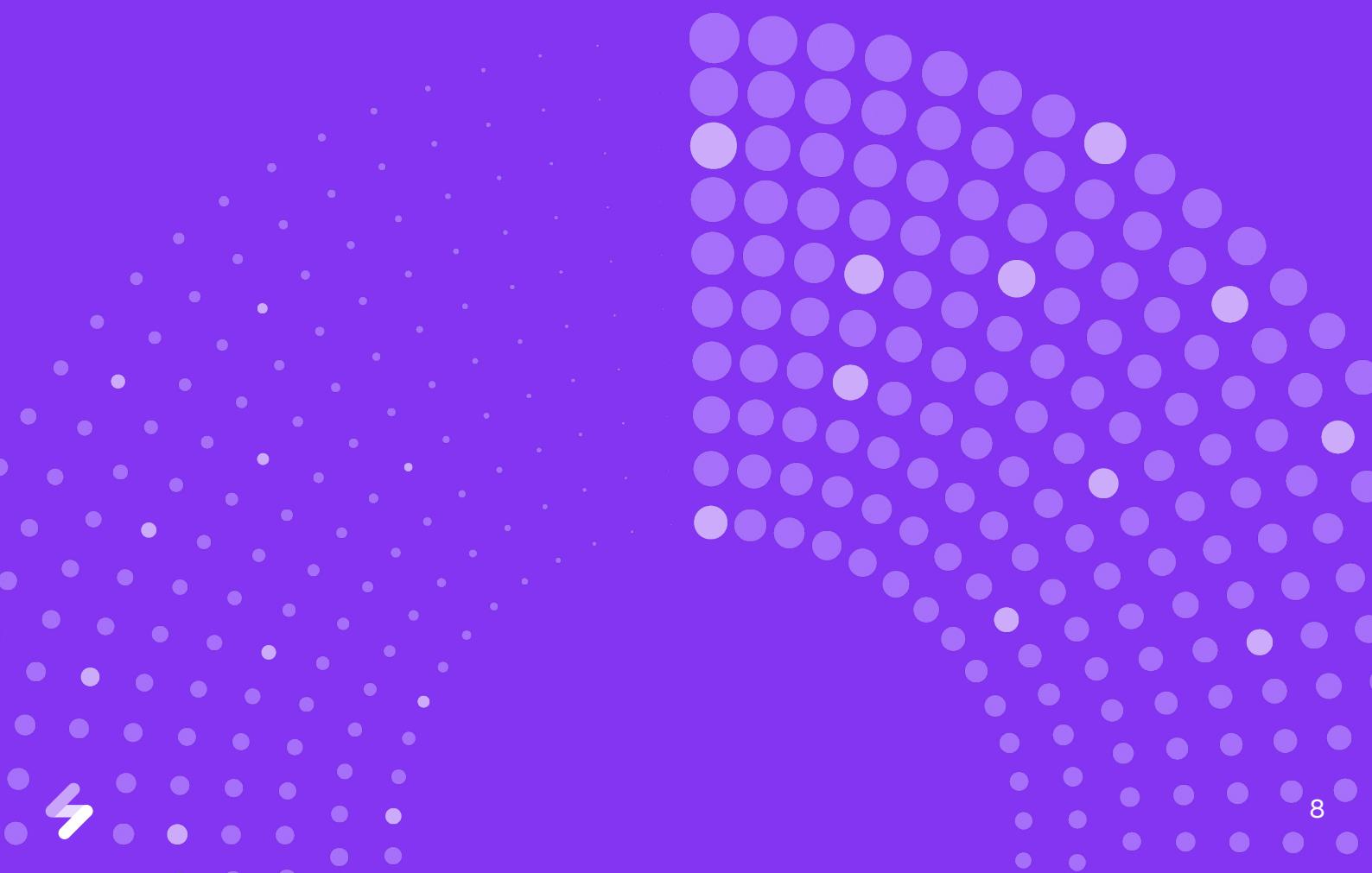


Savant's solution streamlines the complexity of intercompany reconciliations by automating workflows, ensuring data consistency, and reducing manual intervention. It resolves mismatched entries, delivers transparent reports, and enhances accuracy for audits and financial statements.



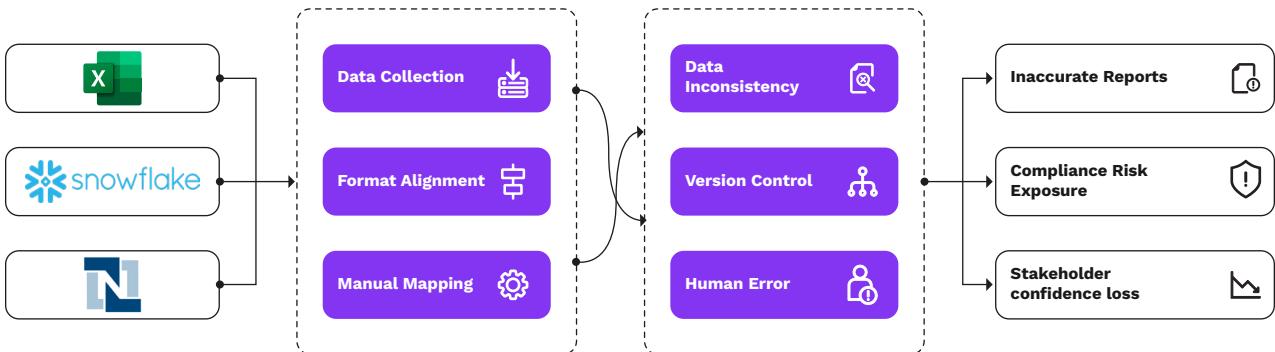
USE CASE

ASSET & LIABILITY RECONCILIATION



ASSET & LIABILITY RECONCILIATION

Reconciling assets and liabilities is critical to ensuring accurate financial reporting. Traditional reconciliation methods often involve manual data consolidation from multiple sources - typically subledgers, vendor statements, purchase orders, spreadsheets, CRMs, databases, even emails - increasing the risk of errors and inefficiencies. Savant streamlines the process with automated workflows that ensure accuracy, consistency, and time savings during audits and reporting cycles.



How Savant Transforms Reconciliation Workflows



What goes in

- Asset and liability data from systems like Excel, NetSuite, Oracle, or Snowflake.
- Audited financial statements for verification and cross-checking.
- Reference files for account classifications and streamlined categorization.



What gets automated

- Consolidation of data from multiple sources.
- Detection of discrepancies, including mismatches and missing entries.
- Application of pre-set rules for validation, categorization, and calculations.



What comes out

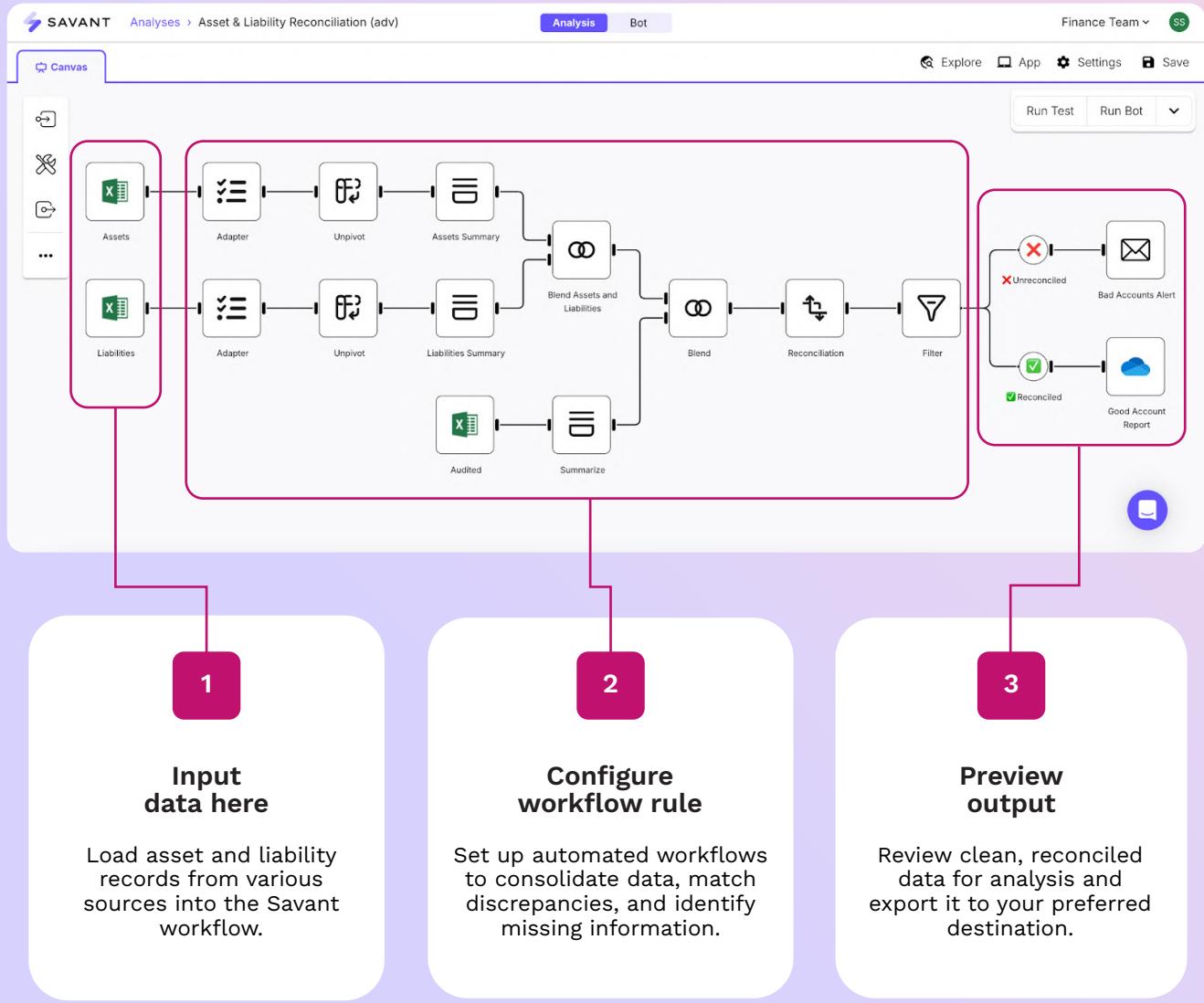
- Clean, reconciled reports ready for analysis.
- Insights to identify gaps, errors, and inconsistencies.
- Audit-ready summaries for faster, more efficient reviews.



What you achieve

- 70% faster reconciliations** - Free up time for strategic tasks.
- Enhanced reporting accuracy** - Reduce errors and build stakeholder confidence.
- Streamlined audits** - Save days of prep time with clean, consolidated data.

Savant Streamlines Reconciliations at Any Scale



Savant's Key Features:

- **Build automated, no-code/low-code workflows.**
- **Extract unstructured data** from PDFs, emails, and other files.
- **Connect directly to ERPs, GL systems, bank feeds, and data warehouses.**
- **Apply matching rules**, calculations (e.g., aging, netting), and reconciliation logic at scale using SQL Pushdown tool or visual logic blocks.

- **Intelligence Graph™** maintains contextual relationships across data (e.g., account hierarchies, mapping rules).
- **AI Agents capture variances**, spot anomalies, or summarize reconciliations.
- **Automatically push reconciled balances**, exception reports, or journals to Excel, PowerBI, Tableau or NetSuite.



Savant simplifies month-end cost assurance processes by automating General Ledger queries, mapping data, and categorizing expenses. It reduces manual workload, ensures compliance with regulatory requirements, and provides actionable insights for better financial analysis and reporting.

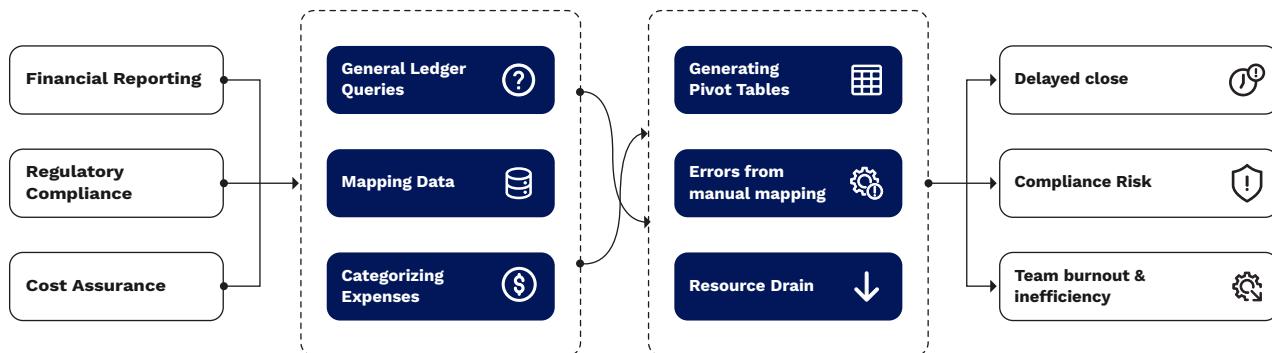


USE CASE

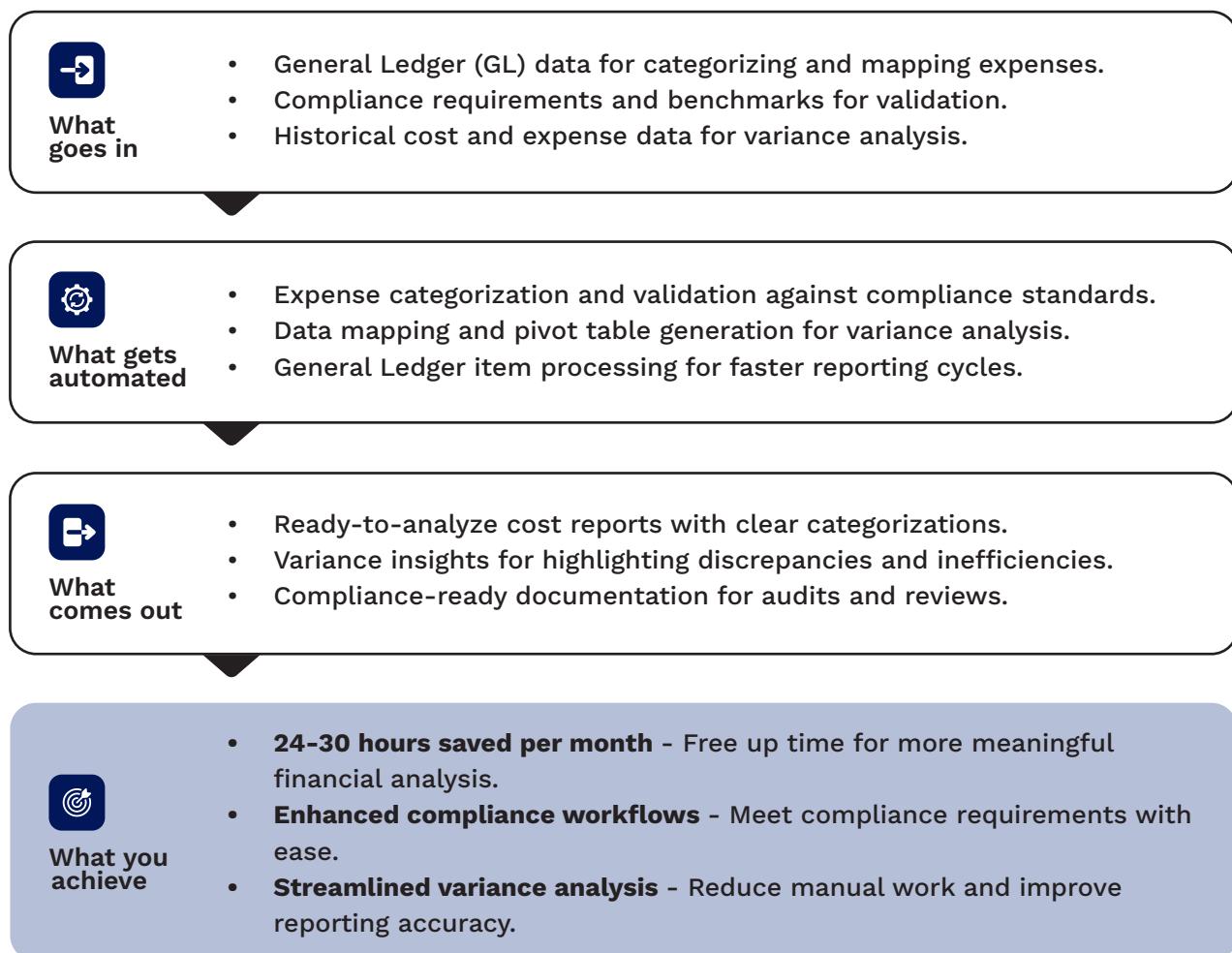
MONTH-END COST ASSURANCE

MONTH-END COST ASSURANCE

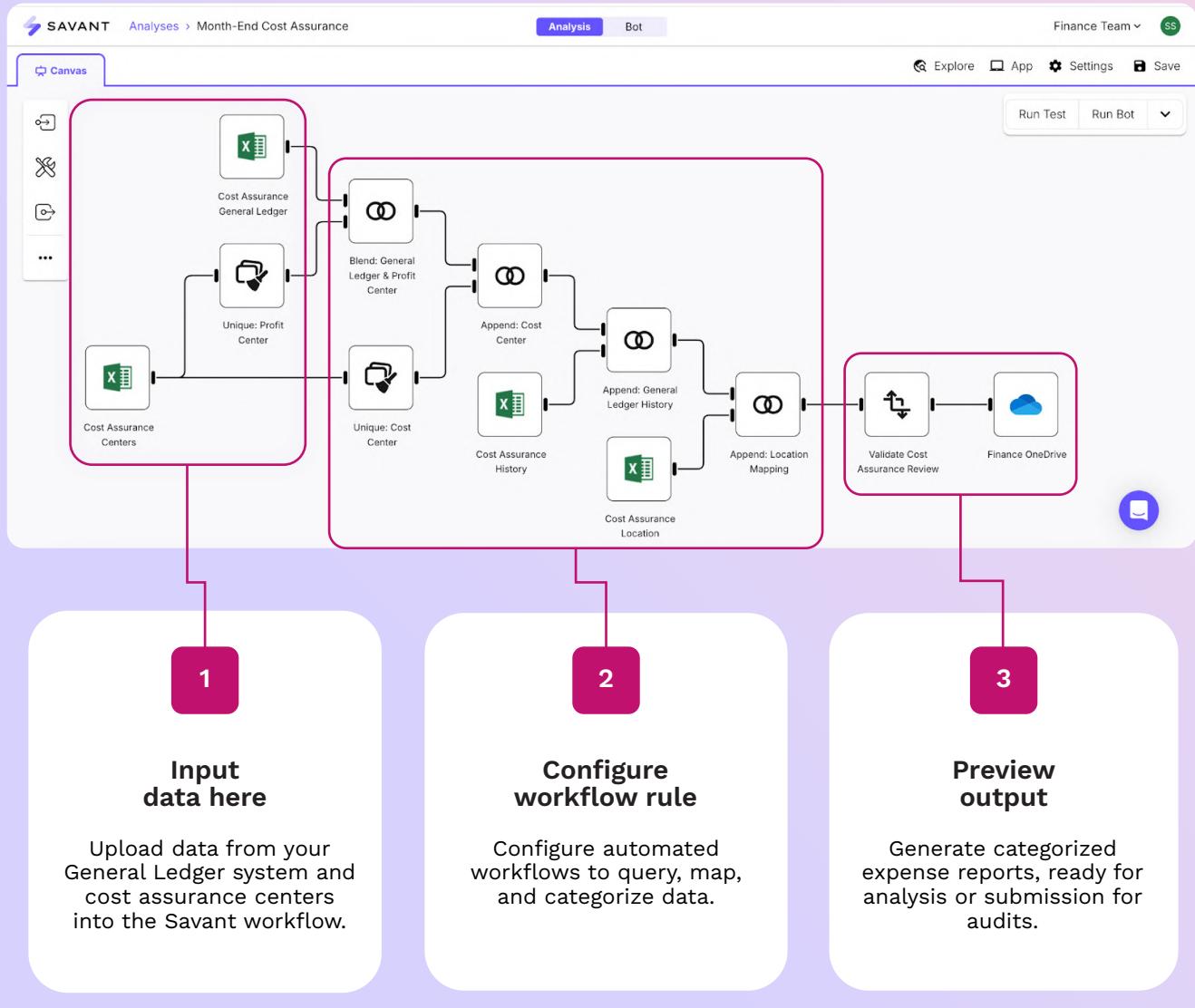
Month-end cost assurance processes are essential for ensuring accurate financial reporting and compliance with regulations. However, many accounting teams face the challenge of repetitive tasks such as running GL queries, mapping data, categorizing expenses, and generating pivot tables. Savant streamlines this workflow and helps teams meet compliance standards while focusing on high-value analysis and decision-making.



How Savant Transforms Month-End Cost Assurance Workflows



Savant Delivers Accurate Month-End Cost Assurance



Savant's Key Features:

- **Pre-Built data connectors** ingest data from ERP systems (SAP, Oracle, NetSuite), cost centers, procurement systems, and operational platforms (e.g., inventory, freight, production logs).
- **Cost Assurance Flow templates** automate validation of actuals vs. forecast, detect cost anomalies or spikes, and reconcile purchase orders vs. invoices vs. received goods.
- **Logic Blocks + SQL Pushdown** reconcile logic, tolerances, variance thresholds, and cost classification rules using no-code tools or embedded SQL.

- **Intelligence Graph™** creates a shared metadata layer that links intercompany transaction attributes, entity relationships, and logic across workflows.
- **Currency conversion & time zone adjustments** automate FX rate application for reconciling intercompany balances in different currencies.
- **AI Agents** explain variances, summarize reconciliation outcomes, or recommend matching rules based on past resolutions.
- **Push results** to Excel, Tableau, Power BI, Snowflake, or journal entry modules in ERPs.
- **Audit-ready governance layer** has full versioning, approval workflows, and access control.



Savant's solution helps businesses handle large volumes of reconciliation data with ease. It improves operational efficiency by reducing manual tasks, highlights discrepancies to ensure data integrity, and streamlines audits by providing actionable insights.

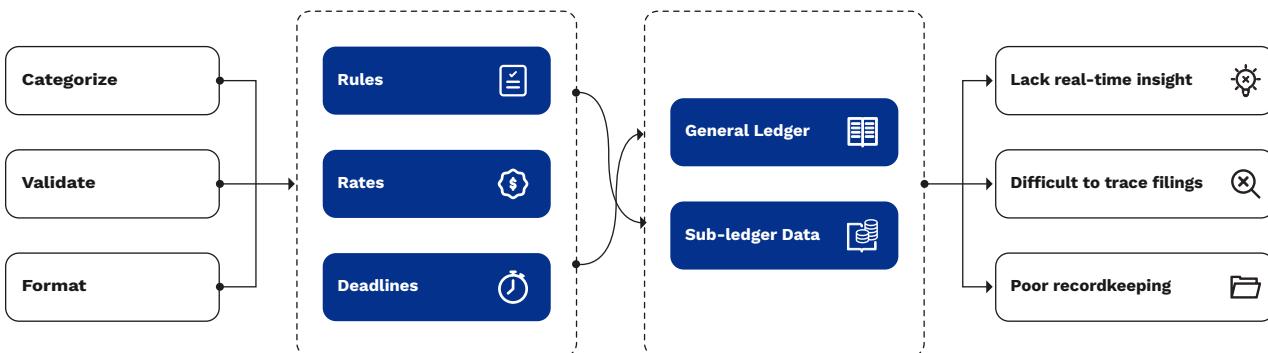


USE CASE

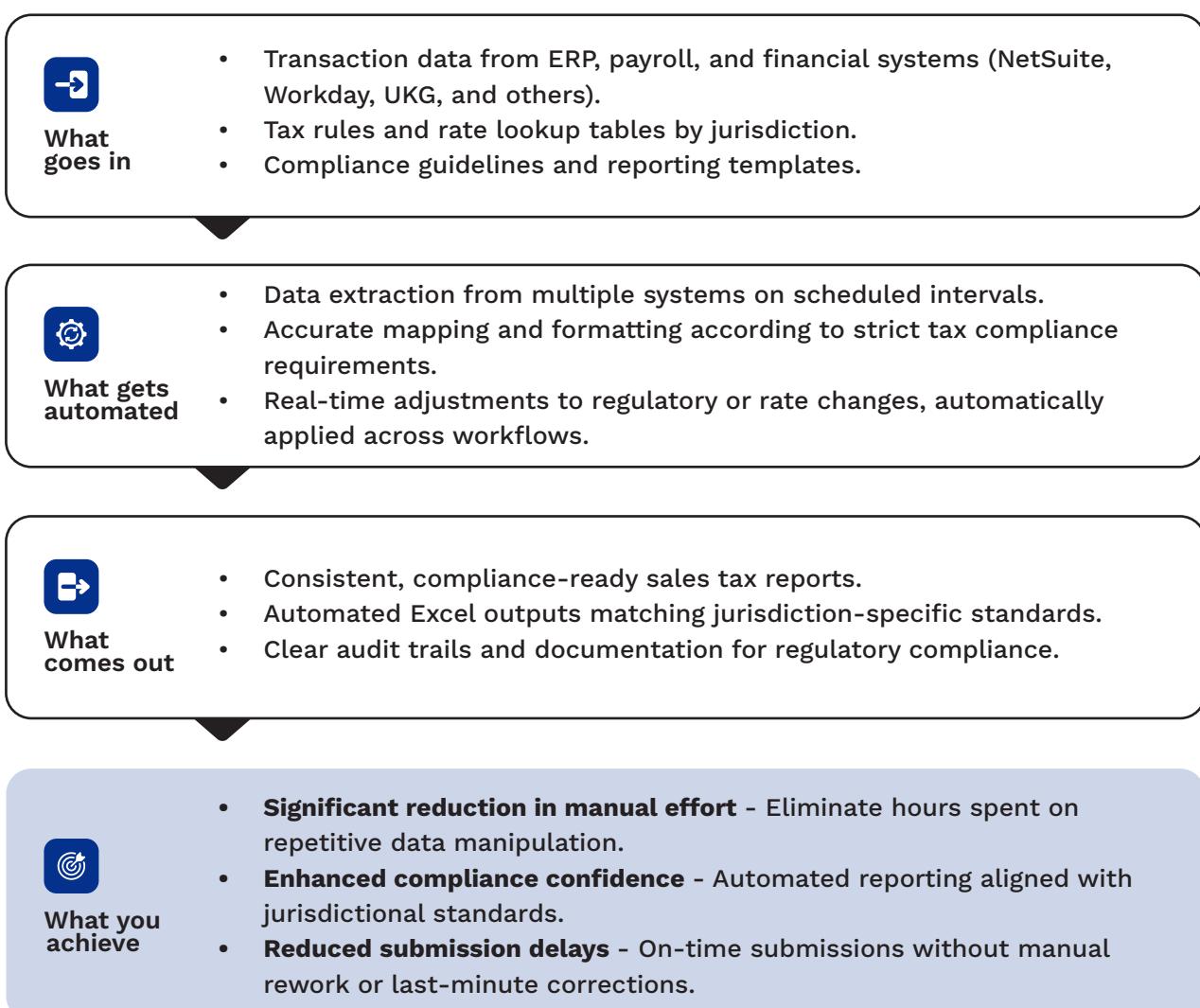
SALES TAX CALCULATION AND COMPLIANCE

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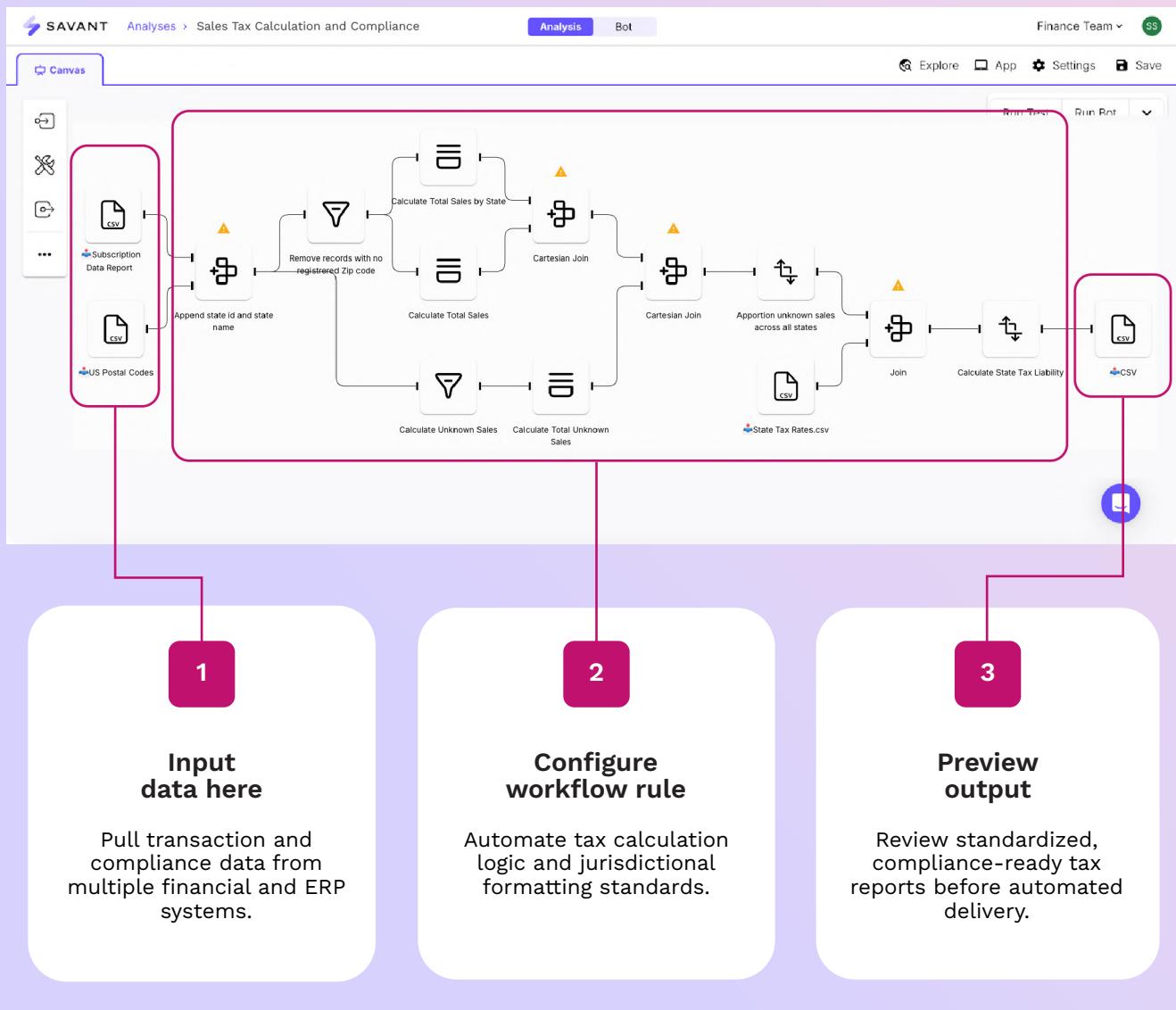
Accurate sales tax reporting across multiple jurisdictions can be complicated. Traditional processes involve pulling data manually, frequent formatting adjustments, and navigating strict compliance standards. Savant simplifies sales tax workflows, automating data extraction, standardizing tax calculations, and ensuring accurate, timely reporting across all jurisdictions.



How Savant Transforms Sales Tax Calculation Workflows



Savant Streamlines Sales Tax Calculation and Compliance



Savant's Key Features:

- **Automatically pull transactional data** from ERPs (e.g., SAP, NetSuite, Oracle), E-commerce platforms, billing systems and CRMs.
- **Sales Tax Rules Engine (Logic Blocks + SQL)** for jurisdictional rates (state, county, city), product/service taxability, and Nexus status and thresholds.
- **Real-Time Tax Calculation Flows** calculate correct tax per transaction, flag missing or conflicting data (e.g., location mismatch, no exemption certificate).
- **Exemption Certificate Matching & Validation** captures exempt transactions against uploaded certificates and rules.

- **Savant Intelligence Graph™** links tax rules, customers, SKUs, and regions contextually across workflows.
- **Automated Reconciliation & Variance Analysis** reconciles calculated tax vs. posted GL tax entries or external returns.
- **Audit Trail & Governance** maintains full version history of tax rules, calculations, overrides, and user actions.
- **Output to Filing Systems, vendors or systems** pushes final calculations or reports to Avalara, Sovos, Vertex (for filing) or internal BI tools or tax dashboards.
- **Deliver reports** to Tableau, Power BI, or export back into ERP modules (e.g., JE adjustments, variance reports).



Savant removes manual bottlenecks from multi-jurisdictional tax workflows. By automating data extraction, mapping to regulatory standards, and delivering ready-to-submit reports, Savant ensures consistent compliance, reduces risk, and lets your team focus on strategic financial management.

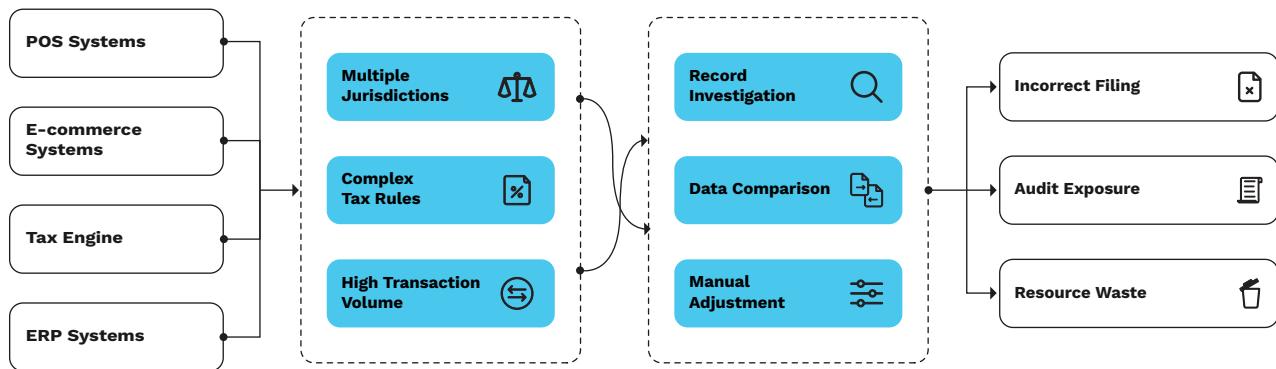


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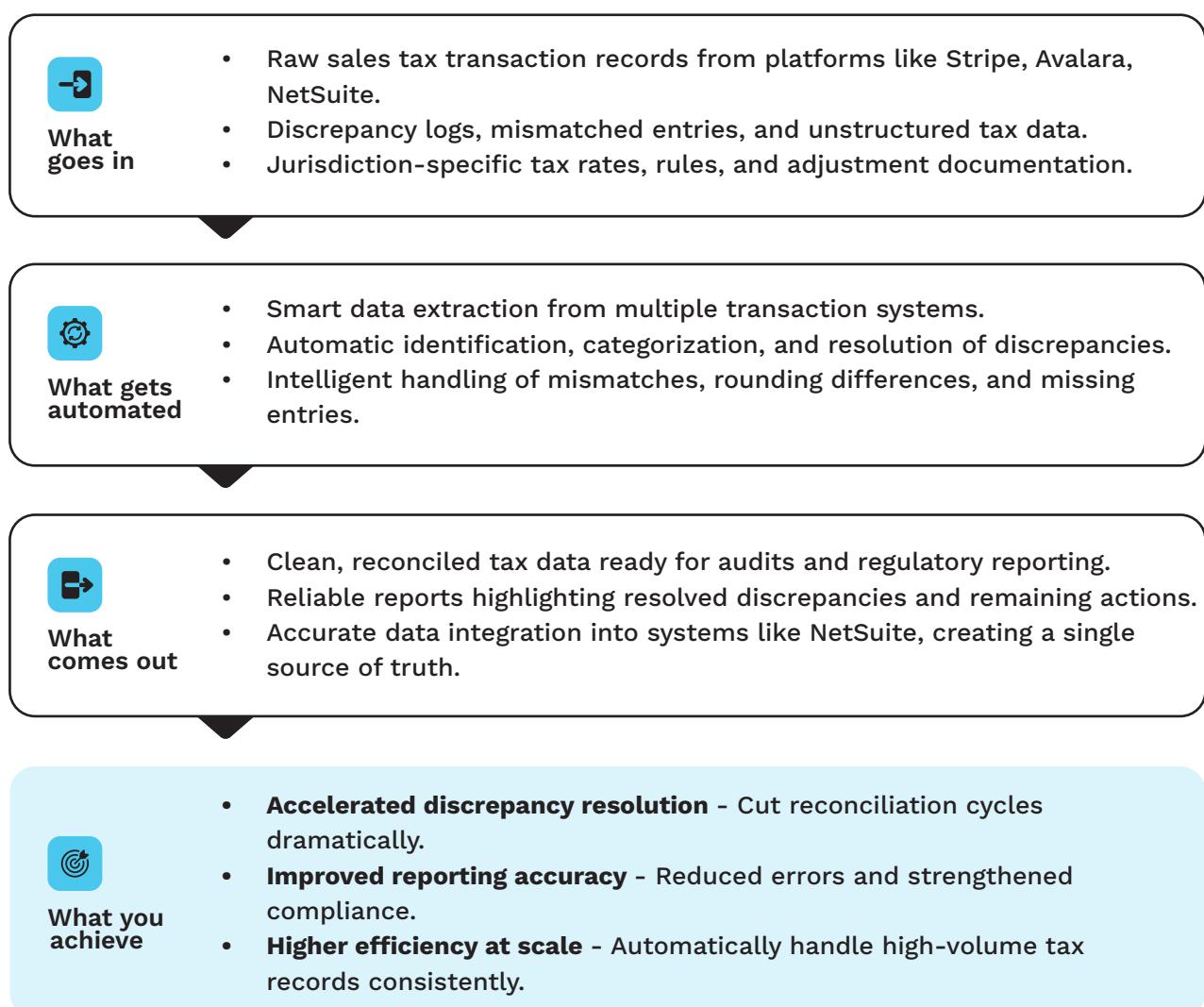
SALES TAX DISCREPANCIES

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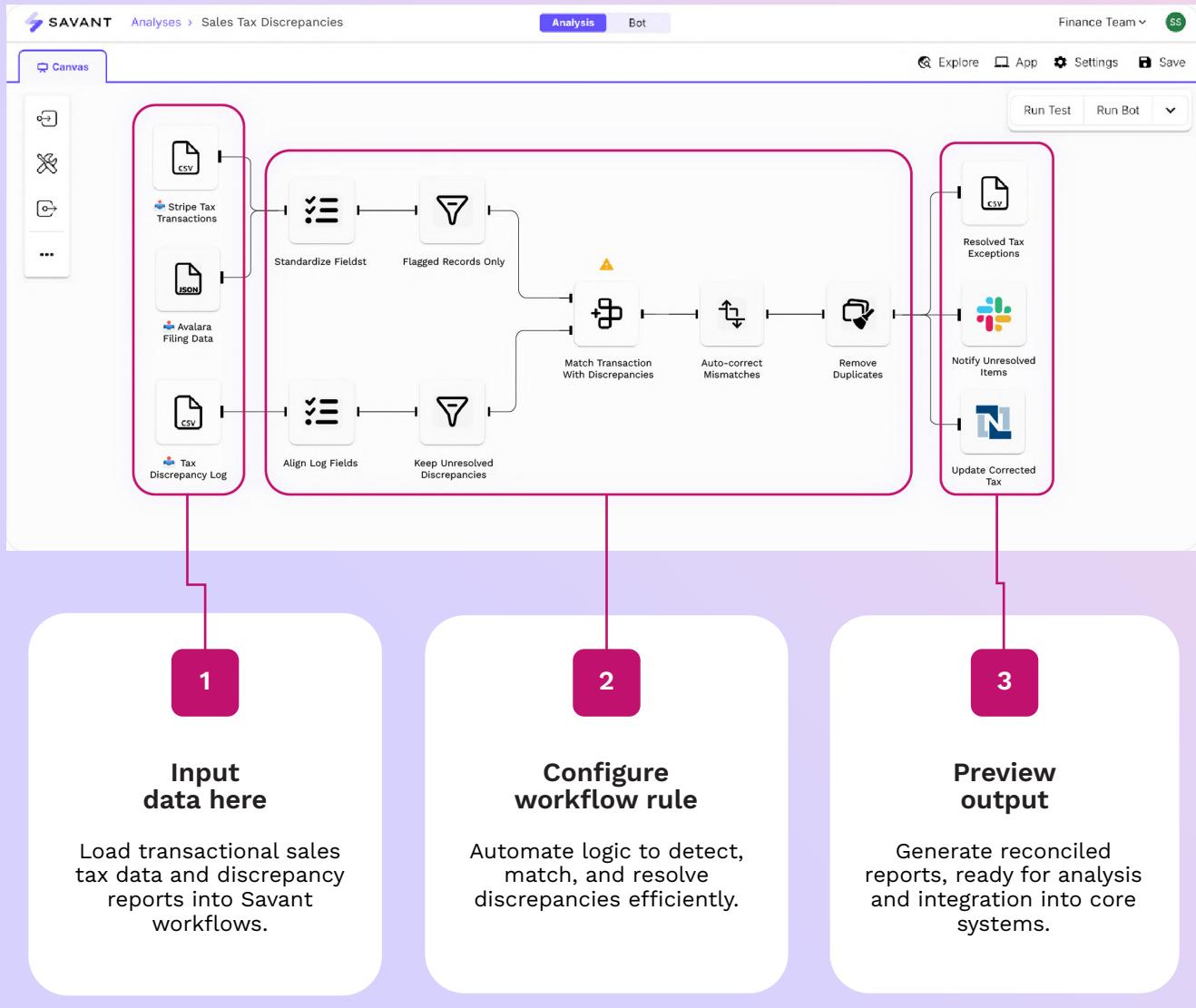
Resolving sales tax discrepancies is often manual and error-prone. Teams face challenges handling mismatched records, high transaction volumes, and fragmented tax data from various sources. Savant transforms these tedious tasks into streamlined workflows, quickly identifying discrepancies, automating reconciliation, and ensuring accurate multi-regional tax reporting.



How Savant Transforms Sales Tax Discrepancy Workflows



Savant Automates Sales Tax Discrepancy Resolution



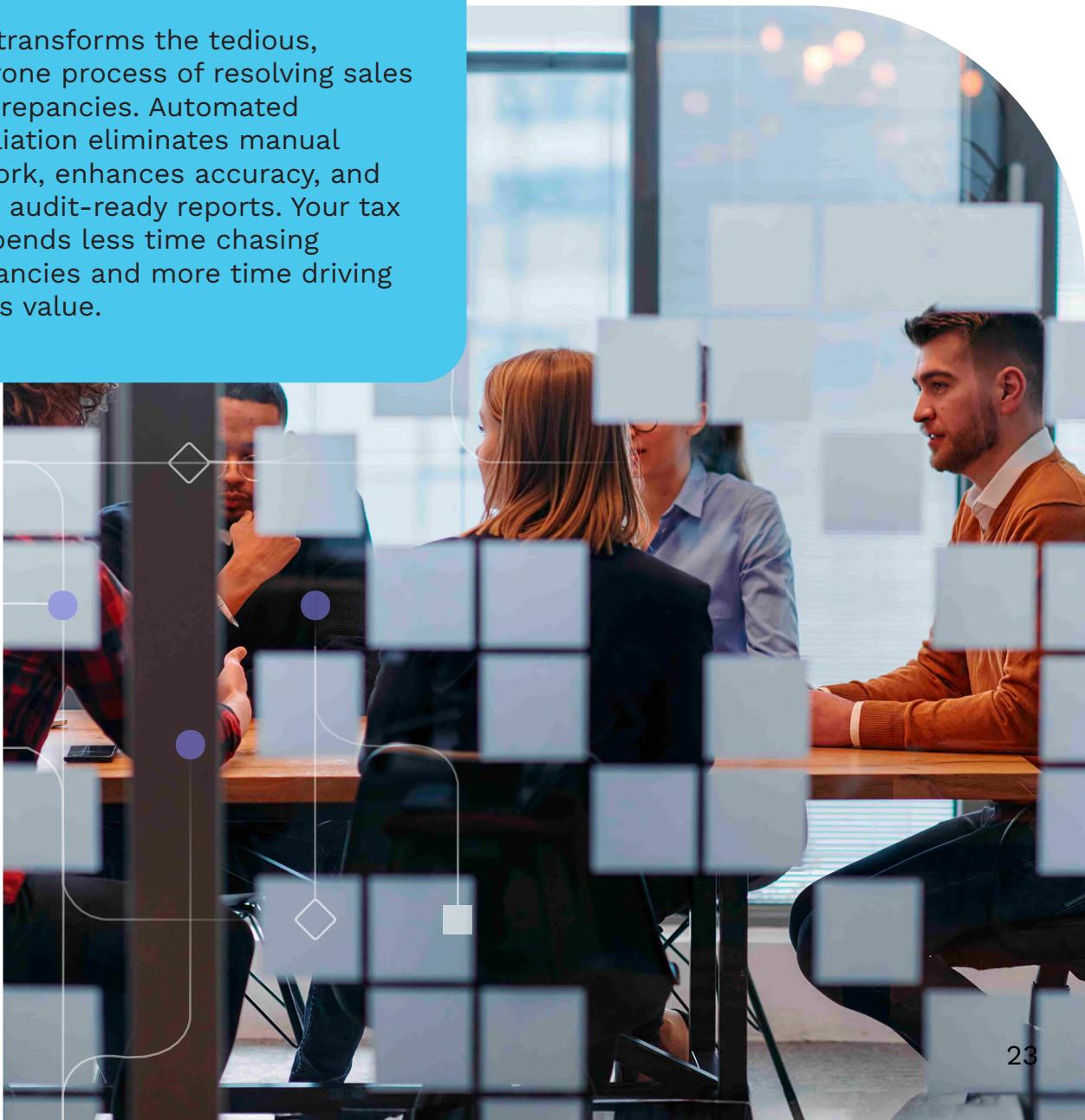
Savant's Key Features:

- **Multi-Source Data Ingestion** pulls data from ERP, billing platforms, point-of-sale, e-commerce, and tax engines (e.g., Avalara, Vertex).
- **Discrepancy Logic Flows (Visual + SQL)** creates automated rules to compare calculated vs. collected, collected vs. posted, GL vs. return file totals and entity or jurisdiction-level mismatches - no more VLOOKUPS or manual tie-outs.
- **Tolerance Thresholds & Exception Handling** can set dollar or percentage thresholds for allowable variance.
- **Savant Intelligence Graph™** contextualizes discrepancies by linking customer, SKU, jurisdiction, exemption status, and time period.

- **Workflow Routing for Review** automatically sends flagged discrepancies to the right owner in Tax, AR, or Finance with full drill-through detail.
- **Audit Trail & Version Control** tracks every override, comment, adjustment, and resolution step.
- **Variance Summary Dashboards** visualize unresolved discrepancies by region, tax type or root cause (rate mismatch, exemption error, wrong GL code).
- **Push resolved data** back into ERP, tax software, BI dashboards, or external auditors.



Savant transforms the tedious, error-prone process of resolving sales tax discrepancies. Automated reconciliation eliminates manual guesswork, enhances accuracy, and delivers audit-ready reports. Your tax team spends less time chasing discrepancies and more time driving business value.





CUSTOMER STORY

SALES TAX RECONCILIATION



About Rover

Rover, a leading online marketplace for pet care services, faced major challenges managing high-volume sales tax reconciliation. Disparate data systems and manual processes made timely compliance and accurate reporting difficult.

Customer Challenges

- Manual extraction of tax data from separate sources
- Frequent mismatches and reconciliation errors
- Fragmented, unreliable reporting

Savant's Solution

- Automated data extraction from NetSuite, Avalara, Stripe
- Smart matching and automated discrepancy resolution
- Unified, reliable data delivery directly into ERP system

Results



ZERO

Unresolved tax discrepancies



ONE HOLISTIC VIEW

Of all sales tax data sources



REAL-TIME

Response to global tax rule changes



CUSTOMER STORY

MULTI-JURISDICTION TAX COMPLIANCE

OXFORD

About Oxford Industries

Oxford Industries, a publicly traded clothing company that specializes in high-end clothing and apparel, wanted greater efficiencies with their payroll and tax reporting workflows.

Customer Challenges

- Data manually reformatted under tight deadlines
- High risk of errors causing compliance rejections
- Frequent revisions causing repetitive manual work

Savant's Solution

- Automated data mapping and dynamic formatting
- Reliable automated validation and accuracy checks
- Scheduled workflows handle revisions seamlessly

Results



100% ACCURACY

In compliance-ready tax reports



ZERO

Formatting errors or submission rejections



ON-TIME

Submissions, even with last-minute revisions



CUSTOMER STORY

INTERCOMPANY RECONCILIATION

FORTUNE
500

About the Customer

A leading Fortune 500 financial services company faced significant operational challenges with their intercompany reconciliation processes.

Customer Challenges

- Manual, time-consuming reconciliation process outside the GL system
- 40+ hours monthly, diverting accountants from high-value tasks
- Leadership lacked confidence in reporting accuracy

Savant's Solution

- Automated reconciliation: Savant created lookup tables for accurate account assignment
- Transaction categorization: Applied rules to categorize intercompany transactions and loans
- Automated reporting: Delivered clarity on transaction rationale and entity involvement, enhancing transparency for stakeholders

Results



95% REDUCTION

In reconciliation time



ZERO MANUAL ERRORS

Boosting data reliability



INCREASED CONFIDENCE

In financial reporting accuracy

Savant: Your Partner in Transformation

AI, Automation, and Agentic Finance Workflows

Add AI, automation and AI Agents to modernize your financial processes.

Savant helps finance, accounting, and tax teams automate data prep, reconciliation, reporting, and compliance workflows — without writing a single line of code. Built with native AI and agentic agents, Savant easily replaces repetitive tasks and legacy systems with intelligent, self-improving workflows that supports how your teams work.

With Savant, you get:

- One unified workspace to access, cleanse, transform, and analyze finance data
- Automation that adapts to your business logic, not generic rules
- Audit-ready reporting and documentation at every step
- 300+ native connectors, including NetSuite, Oracle, QuickBooks, ADP, Workday, Avalara
- No-code agents to handle matching, cleansing, enrichment, and insight generation
- Built-in governance with access controls, audit trails, and data lineage
- BYO LLM support to leverage OpenAI, Anthropic, Gemini, or your choice of model

Whether you're resolving tax discrepancies, automating reconciliations, or accelerating month-end close, Savant scales with your needs — securely and transparently.

Visit www.savantlabs.io to
schedule a demo today.

