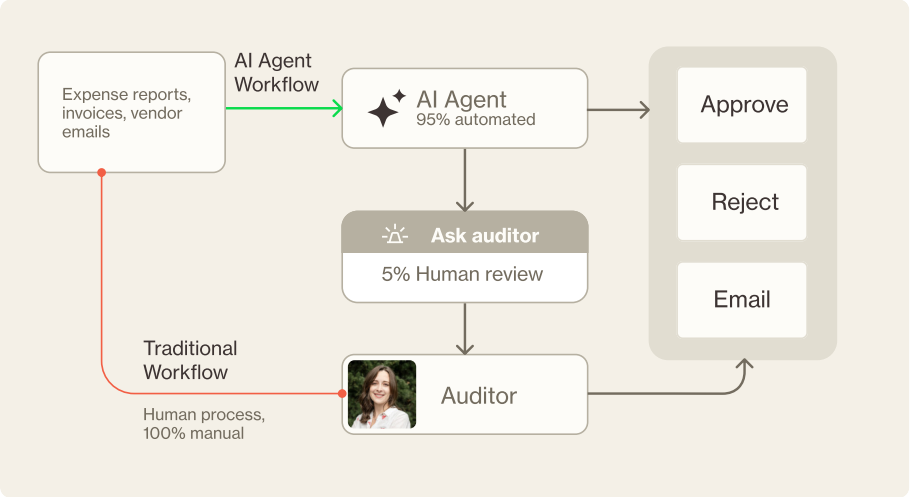
AI Agents: Unlocking autonomous finance

Deliver value and drive impact with intelligent automation



AI Agents transform teams from “always in the loop” to “focused on strategic decisions.”

Unlike chatbots, AppZen’s AI Agents are embedded into your processes. They actively and autonomously support the business like invisible team members, transforming your standard operating procedures into intelligent automation with precision, speed, and control.

What can you expect with AI Agents on your team?

90%
compliance rate in 6 months

70%
fewer reimbursement escalations

40-50%
average team workload reduction

Why finance teams need AI Agents

Quickly and easily automate your proven procedures without coding or IT resources, using digital assistants that adapt as your business evolves.

Workload & resource challenges

As business expands, finance teams face increasing transaction volumes

SOLUTION

AI Agents handle growing workloads automatically, cutting costs while enabling teams to do more with fewer resources.

Stricter compliance demands

Organizations must meet complex regulatory and policy requirements.

SOLUTION

AI Agents create detailed audit trails, consistently enforce policies, reduce turnaround time, and eliminate manual review errors.

SOP execution gaps

Manual execution of SOPs leads to inconsistency and delays.

SOLUTION

AI Agents turn clear SOPs into consistent action, reducing escalations. Decision-making and policy adherence are more reliable.

Digital transformation needs

RPA and template-based solutions can’t make smart, complex decisions.

SOLUTION

AI Agents read text, evaluate context, and make intelligent decisions, then take action, achieving what traditional automation cannot.

Speed requirements

Traditional processes take days, creating bottlenecks and frustration.

SOLUTION

AI Agents cut processing time down to seconds. Real-time approvals and reimbursements improve employee and vendor relations.

Business agility

Market shifts, policy changes, and team growth require adaptations.

SOLUTION

AI Agents can be quickly adjusted without coding or IT support, maintaining effectiveness as business conditions evolve.

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How AI Agents understand your SOPs

AppZen AI Agents interpret finance rules written in natural language, enabling finance teams to define tasks without coding. These Agents replicate auditor behavior and scale across thousands of transactions a day.

Inside the AppZen AI Agent ecosystem

Our AI Agents are pre-trained with finance domain knowledge and an understanding of key finance functions, making them easy to adapt to your real-world use cases.

Expense auditing use cases

Luxury ride approvals
3,000+ monthly Uber Black expenses required manual review, causing delays

SOLUTION
Auto-reject amounts above thresholds ($100 card/$50 cash) and request business justification

Auto-approve charges below policy limits

RESULT
80%-90% of expense lines handled autonomously

Hotel receipt validation
Hotel receipts lacked itemization or proper company billing information

SOLUTION
Auto-reject receipts missing NIP/ VAT ID or billing name

Auto-approve properly itemized lines billed to the company

RESULT
Improved compliance and reduced manual intervention

Airfare booking verification
Airfare was not booked through authorized travel agencies

SOLUTION
Auto-reject airfare not booked via a corporate travel agency

Auto-approve airfare with a valid corporate travel agency confirmation

RESULT
80% reduction in high-risk audit lines

Accounts payable use cases

Specialized AP Extraction Agent
Extract specific invoice line items based on custom business logic

SOLUTION
Extract line details from summary section. Identify “Contract Usage” in descriptions. Process “Equipment Lease” items when present

RESULT
Accurate extraction, fewer downstream errors, and reduced manual review

Specialized PO Matching Agent
Split and match invoice lines across multiple purchase order lines

SOLUTION
Calculate and compare total dollar amounts of invoice and PO lines. Return matched lines in JSON format

RESULT
Increased automation and reduced payment errors

Advanced Learning Agent
Extract complex fields with inconsistent formats across vendors

SOLUTION
Learn from examples to recognize invoice numbers with character restrictions and formatting rules

RESULT
Fewer exceptions and faster straight-through processing rates

Case study: AI Agent ROI

AppZen AI Agents and low-code AI tools transformed expense audits at a global company for unprecedented automation and cost savings.

80%
of expense lines automated

50%
auditor workload reduction

500k
high-risk expense lines analyzed