

FloQast Transform

Build no-code, auditable AI agents to automate complex accounting workflows—at scale—across your close management, compliance, and reporting functions.



Increasing Complexity and Pressure

It's a familiar scene: disparate systems that are difficult to integrate and maintain, incompatible data that requires hours to transform, and disconnected processes laden with manual steps that consume valuable resources and can lead to costly errors. For accounting teams expected to do more with less, it's an unsustainable situation that delays decision-making and erodes competitive advantage.



Turn Your Preparers into Reviewers

With FloQast Transform, accounting teams can build, test, deploy, and manage FloQast AI Agents using natural language to automatically execute complex, routine accounting workflows, such as journal entries, reconciliations, and report compilations, on behalf of preparers—without writing a single line of code.

By combining preconfigured accounting rules with prompt-based agent builder capabilities, FloQast Transform enables rapid iteration and deployment so teams can accelerate time to productivity and adapt quickly to ongoing change.

Key Features

Easily Build FloQast AI Agents

Create and update FloQast AI Agents using natural language prompts. FloQast AI translates your business rules into executable code to automate multi-step, data-intensive workflows—without the heavy IT lift.

Ensure Accurate, Auditable Results

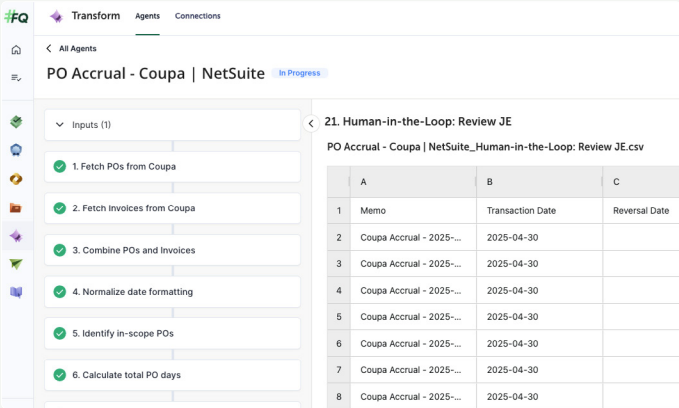
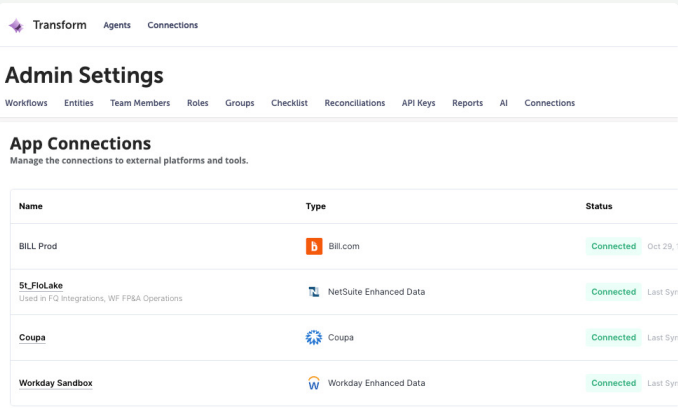
Document each workflow step, review every agent output, and build AI Agents on an accounting transformation platform that has achieved ISO/IEC 42001 certification, meeting globally recognized standards for responsible, transparent, and reliable AI innovation.

The screenshot displays the FloQast Transform interface. On the left, a 'Coupa Accruals' workflow is shown with steps: 1. Determine in-scope POs, 2. Calculate service periods, 3. Determine invoice tolerance threshold, 4. Calculate monthly and daily averages, 5. Calculate accrued amounts, 6. Identify exclusions, and 7. Compare to actual amounts. The 'Results' section shows 'Coupa Accruals Dec 24.xlsx' and a 'Journal Entries' table. On the right, the 'Review Agent Output' section shows a table of results.

Test Case	Chart of Account PO Number	Invoice #	Billing	Invoice Date	Sub Department	Region	Status
1	FloQast Inc. 1011	4364	2-647000-14	01-01-2024	Data Software	US	Approved
3	FloQast Inc. 1011	4578	2-647000-14	02-01-2024	Data Software	US	Approved
4	FloQast Inc. 2222	9642	2-647000-14	03-01-2024	Data Software	US	Approved
5	FloQast Inc. 2222	7653	2-647000-14	04-01-2024	Data Software	US	Approved
6	FloQast Inc. 3333	4563	2-647000-14	05-01-2024	Marketing Serv	US	Approved
7	FloQast Inc. 3333	2711	2-647000-14	01-15-2024	Marketing Serv	US	Approved
8	FloQast Inc. 4444	1117	2-647000-14	09-01-2024	Creative Deliver	US	Approved
9	FloQast Inc. 4444	5889	2-647000-14	11-01-2024	Creative Deliver	US	Approved

Connect to your Trusted Systems

Transfer data securely from your ERPs and third-party applications like Oracle NetSuite and Coupa to ensure system interoperability, facilitate automation across end-to-end workflows, and unlock your data.

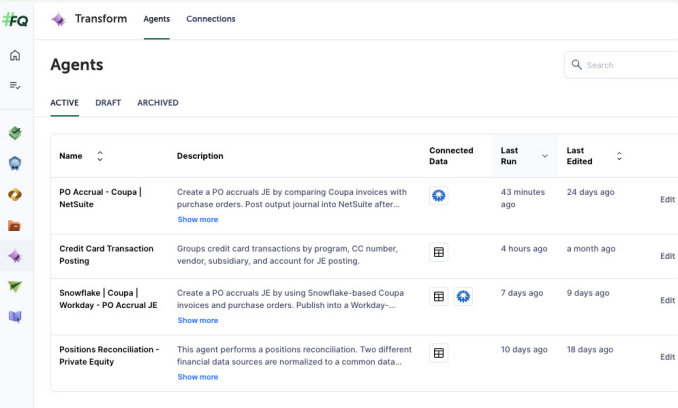


Accelerate Testing and Deployment

Manage all FloQast AI Agents and the workflows they automate in one central hub. Run tests and fine-tune AI Agent responses in real time to scale your processes and adapt to evolving business requirements.

Automate More on an Extensible Platform

By grounding AI Agents with the FloQast Accounting Transformation Platform, customers can leverage FloQast's full platform capabilities—from AI Transaction Matching to Variance Analysis, Journal Entry Management, and Compliance Management—to extend automation across the financial close.



Visit floqast.com/ai-agents to learn more.