

INTEGRA

AI Automation Pack

Give your finance team its time back

The AI Automation Pack brings three layers of AI automation into Integra - freeing your finance and operational teams to spend less time on routine processing, and more time on judgement, exceptions and expertise.

1 AI-assisted Bank Reconciliation

Imports and matches bank statements automatically, with up to 95% accuracy.

WHAT IT DOES

- Open Banking integration - no manual imports
- Learns and improves over time
- Automatically creates missing transactions
- Full audit trail for governance and compliance

WHY IT MATTERS

- ✓ Frees your team from manual matching and chasing discrepancies
- ✓ Speeds up period-end close and builds confidence in your numbers

95%

MATCH ACCURACY

Typical automatic match rate on bank statement transactions, improving further over time - all within the same auditable, governed workspace as the rest of Integra.

2 Automation Tool

Builds and manages automated workflows across HR, finance and customer management.

WHAT IT DOES

- Works through your existing application front end
- Ready-made process library, or build your own
- Automates tasks like GRN completion and leaver management
- Supports alerts, robots and variable set-up

WHY IT MATTERS

- ✓ Takes repetitive, rules-based work off your team's plate, reliably
- ✓ Frees up capacity without changing how your team already works

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3 Agentic AI Brings Reasoning and Action

Ask Integra, in plain English, to complete a task using your live data.

WHAT IT DOES

- Reasons through variable, judgement-based work
- Works out the right steps itself - not a fixed script
- Handles variability within guardrails you define
- Knows when to hand back to a person

WHY IT MATTERS

✓ Delivers the outcome you actually asked for, not just a report

✓ Same governance and audit standards as the rest of Integra

The Key Benefits

Less time on routine work
Reconciliation, workflows and reporting run themselves.

Stronger governance and audit trail
Every action logged and every number traceable.

Fewer manual errors
Consistent, rules-based execution across high-volume tasks.

Faster answers, fewer reports
Ask Integra directly instead of raising a request.

More time for judgement
Your team focuses on the exceptions that need a person.

Automation Tool vs Agentic AI

The Automation Tool executes predefined workflows, step by step. Agentic AI reasons its way through work that varies each time. Both run to the same governance and audit standards - together they cover tasks that are routine and those that need judgement.

Next Steps

Explore how this carefully put-together AI Automation Pack can give a significant amount of time back to your finance colleagues. Book a discovery call today.

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