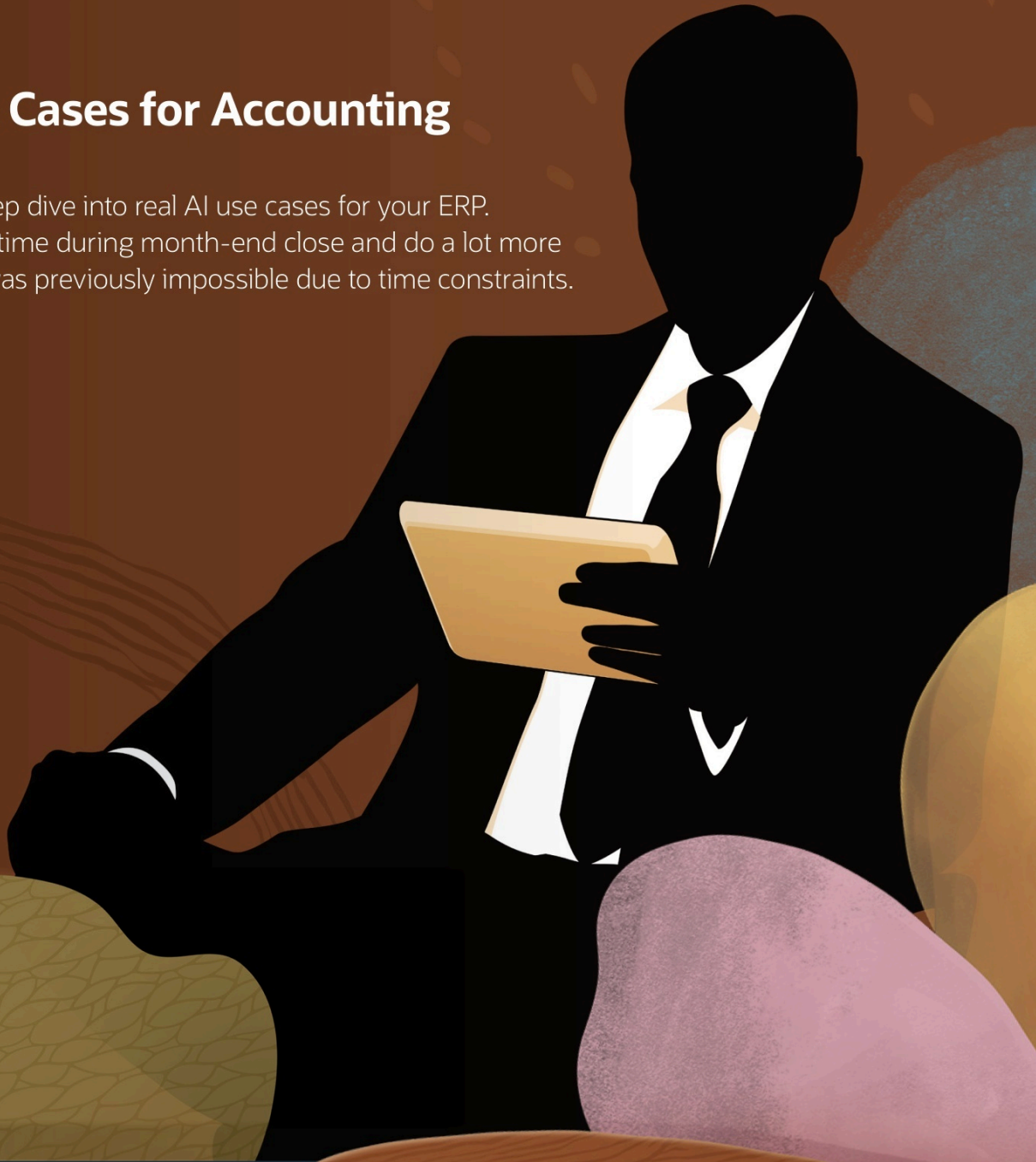


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BUSINESS GUIDE

5 AI Use Cases for Accounting

OnlyCFO's deep dive into real AI use cases for your ERP. Save valuable time during month-end close and do a lot more analysis that was previously impossible due to time constraints.





Grab a seat and enjoy.
Read Time: 11 minutes

5 AI Use Cases for Accounting

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Accounting is one of the best places to leverage AI. And your ERP is the hub for all things accounting. I sat down with my friends at NetSuite to learn what the largest tech-focused ERP is doing with AI.

My mind is still blown by the possibilities. Below I will walk through the following:

1. My checklist for finding AI use cases.
2. My top 5 AI use cases for your ERP.

AI Use Case Checklist

The potential ROI from AI is a balance between:

- **Money/time saved:** Less headcount and/or less software needed as we scale.
- **AI risk:** What is the risk if AI screws up?

Once you determine that there is potential ROI in one of your processes, you need to determine if AI (in its current state) is the right solution.

Below is my checklist of where AI works best:

- **Requires judgment.** Task needs context or reasoning (not just specific rules).
- **Messy inputs.** PDFs, emails, Slack threads, screenshots, etc.

Best AI Use Cases in Your ERP

I asked my friends at NetSuite to give me a demo of what NetSuite AI can do today. And honestly, I recommend you do the same. Take more demos so you can learn more about AI and how you might be able to leverage it more in 2026.

Some of the most powerful AI use cases come from simply connecting AI with your ERP. NetSuite allows you to connect your favorite (or IT approved) AI model to your ERP.

- **Multiple systems and touch points.** Context from multiple tools and people.
- **Same process, different flavors.** The work repeats, but every instance looks slightly different.
- **Clear end goal.** Has a measurable goal that has process and context to achieve.

Rank your most time-consuming processes by the ones that meet the most of the criteria above. That list will be a great starting point for deciding where to leverage AI.

To get your wheels spinning, here are 5 valuable use cases I found through my conversations with NetSuite.

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CASE 1

Self-Service Q&A

Enable departments to query the financial data directly themselves so they can easily build the reports/charts that they want. No more accountant in the middle playing telephone.

Accountants can waste huge amounts of time pulling information for other departments and trying to present it how they want it. Not anymore.

Self-Service Example

Sales Leader: I want to see all my department's software costs for the past year so I can work on my budget for next year.

Claude: Here are some high-level data points on your software spend:

Sales Department Software Costs Analysis

I've analyzed the last 12 months of software costs for the sales department. Here's what stands out:

Annual Overview

- **Total Spend:** \$797,511.73 across all of 2025
- **Monthly Average:** \$66,459.31
- **Growth Rate:** 7.2% increase from January to December

Claude: Here is some more information on how the spend has trended and when you are getting billed. There is one anomaly you may want to look into.

Key Findings

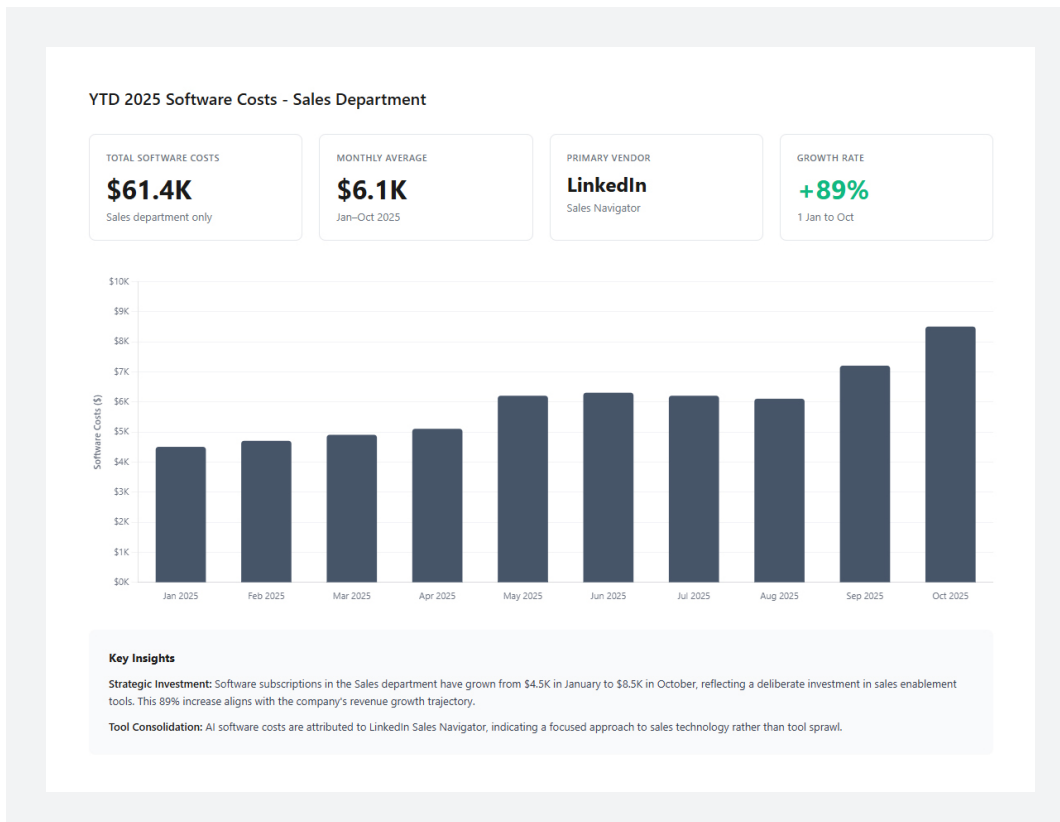
The data shows a consistent upward trend throughout the year, with monthly costs rising from \$64,279.99 in January to \$68,903.07 in December. All expenses are with a single vendor (Core4Solutions) and posted to account 5020 Third Party Software, with bills processed on the first of each month.

There's one notable anomaly: October dipped slightly to \$67,545.41 after September's \$68,227.68, which breaks the otherwise steady growth pattern and might warrant a closer look for potential credits or adjustments.

Claude: And here is all the detail of the bills and a chart showing the trends:

Transaction Details

PERIOD	DATE	TRANSACTION	VENDOR	ACCOUNT	AMOUNT	LINK
Jan 2025	1/1/2025	VBILLU597	Core4Solutions	5020 Third Party Software	\$64,279.99	View
Feb 2025	2/1/2025	VBILLU5100	Core4Solutions	5020 Third Party Software	\$64,922.79	View
Mar 2025	3/1/2025	VBILLU5103	Core4Solutions	5020 Third Party Software	\$64,273.56	View
Apr 2025	4/1/2025	VBILLU5106	Core4Solutions	5020 Third Party Software	\$64,916.30	View
May 2025	5/1/2025	VBILLU5109	Core4Solutions	5020 Third Party Software	\$65,565.46	View
Jun 2025	6/1/2025	VBILLU5112	Core4Solutions	5020 Third Party Software	\$66,221.12	View
Jul 2025	7/1/2025	VBILLU5115	Core4Solutions	5020 Third Party Software	\$66,883.33	View
Aug 2025	8/1/2025	VBILLU5118	Core4Solutions	5020 Third Party Software	\$67,552.16	View
Sep 2025	9/1/2025	VBILLU5121	Core4Solutions	5020 Third Party Software	\$68,227.68	View
Oct 2025	10/1/2025	VBILLU5124	Core4Solutions	5020 Third Party Software	\$67,545.41	View
Nov 2025	11/1/2025	VBILLU5127	Core4Solutions	5020 Third Party Software	\$68,220.86	View
Dec 2025	12/1/2025	VBILLU5130	Core4Solutions	5020 Third Party Software	\$68,903.07	View



The ability for anyone to pull any information they want, get it instantly, and have a nice analysis already performed is seriously a game changer. And guess what? If the sales leader wants something slightly different, they can just prompt Claude again and they will have it instantly. No more back and forth with accounting.



CASE 2

Anomaly Detection

While automation can handle rule-based checks (e.g., flagging an expense over a set dollar limit), true AI-driven anomaly detection looks for patterns that deviate from the norm. In accounting, this is crucial for preventing fraud, identifying costly errors, and tightening controls.

How AI Performs Anomaly Detection

AI models constantly monitor historical transaction data, vendor behavior, and cost trends to establish a baseline of “normal” operations. When a new transaction comes through, AI quickly evaluates it against multiple dimensions:

- **Deviation from spend profile:** Did this vendor typically cost \$5,000, and now a \$50,000 transaction is posted?

- **Contextual comparison:** Is the sales department suddenly incurring a new large expense? A customer invoice falls out of a typical pattern, is this an error?
- **Unusual timing:** Is an expense being processed at 3:00 a.m. by an employee who never works those hours?

The system then flags these anomalies, providing a confidence score and a narrative explanation for why it is considered an anomaly. This moves beyond simple thresholds and provides meaningful insights, saving accounting from manually reviewing thousands of transactions to find a single issue. This fits my AI use case criteria mentioned earlier—requires judgment, messy inputs, and involves multiple data points.

The screenshot displays the Oracle NetSuite 'Exception Management' interface. At the top, there's a navigation bar with 'Transaction Errors' and 'Expected Transactions' tabs. A 'Sensitivity' slider is set to 'High', and a box shows 'Exceptions Pending Resolution: 2' and 'Impacted Transaction(s) Amount: \$50K'. Below this is a search bar and filter options. A table lists the impacted transactions:

Transaction	Type	Accounting Period	Impacted Transaction(s) Amount	Entity	Subsidiary	Status	Action
Bill ##990206 2	Multiple	Nov 2025	\$50,000.00	Eight Rentals	United States	Pending Resolution	View Details
	Incorrect Amount	Nov 2025	\$25,000.00	Eight Rentals	United States	Pending Resolution	View Details
	Incorrect Account	Nov 2025	\$25,000.00	Eight Rentals	United States	Pending Resolution	View Details

CASE 3

Data Analysis

The ability to create complex, customized financial analysis and visualizations instantly through a simple natural language prompt is huge. Instead of spending hours in spreadsheet manipulation or waiting days for the accounting team to build a custom report, AI connects directly to the ERP data and performs data analysis on demand.

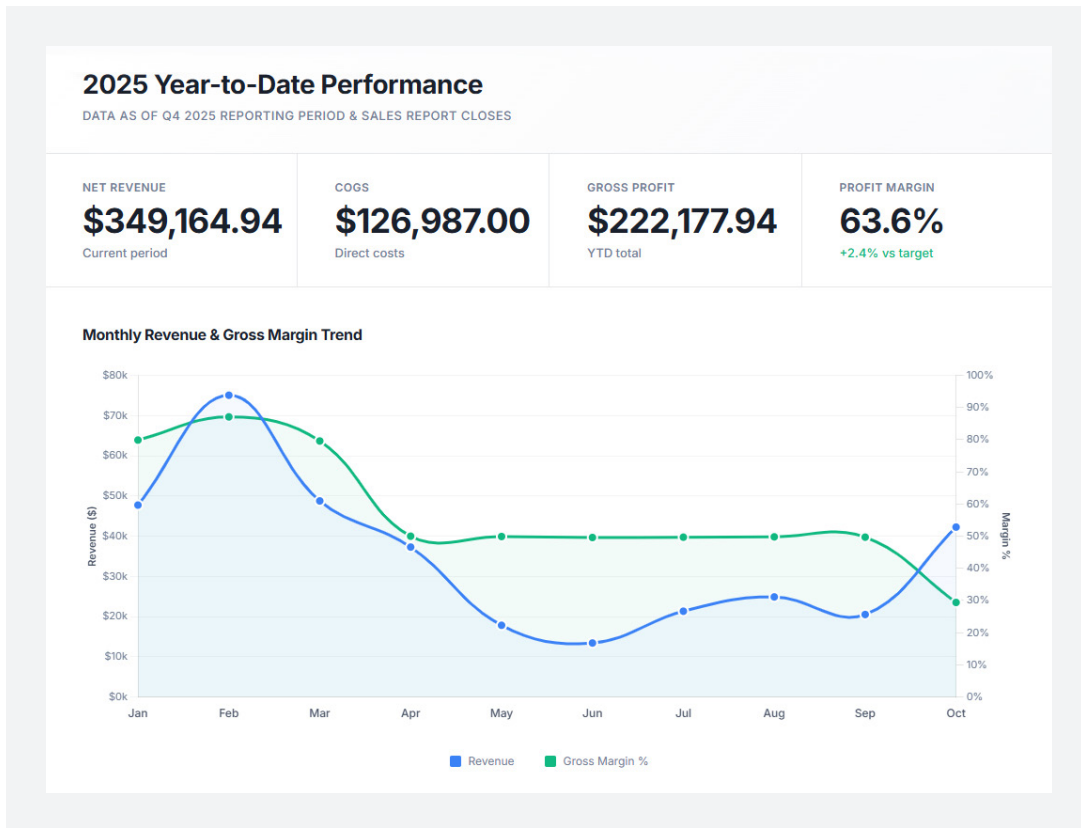
This capability is an extension of the self-service Q&A, but focuses on higher-level analytical requests that traditionally require an experienced analyst.

Data Analysis Examples

AI can instantly interpret complex financial concepts and generate analysis, charts, dashboards, etc.:

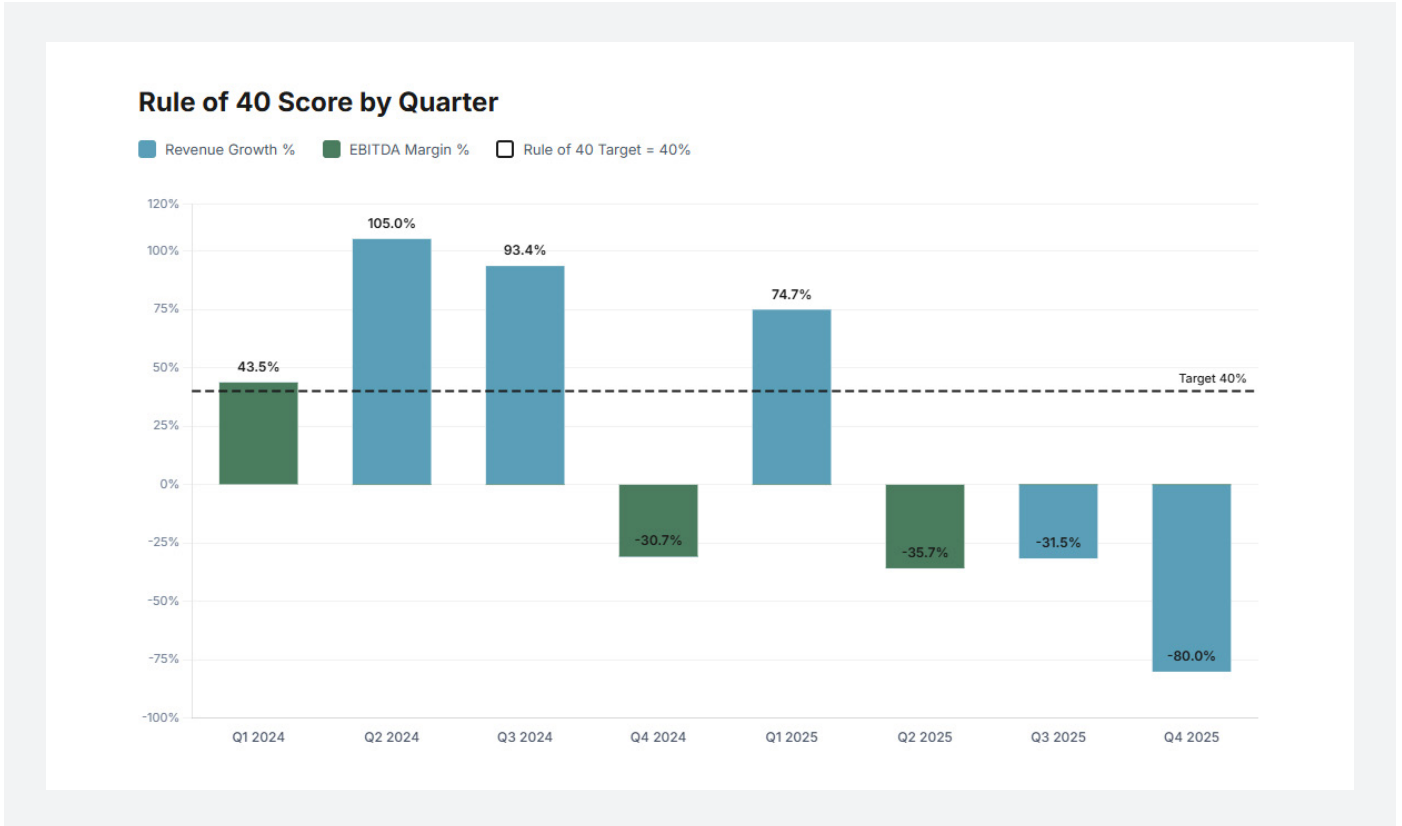
User: Build a line chart that shows revenue growth and gross margins % for the last 12 months.

AI Response: I'll create an interactive line chart showing revenue growth and gross margin percentage for the last 12 months. Let me gather the data first.



User: Create a Rule of 40 chart by quarter for the last 8 quarters. It should show revenue growth rate and EBITDA margin % as stacked bar charts and then include the Rule of 40 Score number at the top of each bar.

AI Response: I'll create a Rule of 40 analysis chart for you. First, let me gather the necessary financial data for the last 8 quarters.



Note: Above is the raw output. The chart isn't perfectly designed (for example, the percentages on the y-axis are hidden). But guess what? You can just re-prompt AI to fix the y-axis problem and it will. Don't give up because the output doesn't look exactly like you want it to the first time. Also, the AI models (Claude, ChatGPT, etc.) are getting better every day so the accuracy will only improve.

The ability to instantly get an analysis like this dramatically accelerates the decision-making cycle by putting these analytics directly into the hands of budget owners and executives.

CASE 4

Flux Analysis

Flux analysis, or variance analysis, is a standard, but often time-consuming procedure in financial reporting. It involves explaining the change in a financial metric (a flux) from one period to the next (e.g., why did Cost of Goods Sold increase by 15% month-over-month?). This task is a perfect fit for AI because it “requires judgment” and is a “same process, different flavors” challenge that involves connecting “multiple systems and touch points”.

How AI Automates Flux Analysis

Traditionally, an accountant would have to manually drill down into the change, reviewing hundreds of individual transactions to isolate the drivers of the change. AI can perform this drill-down automatically and generate a concise, narrative explanation.

Or if you prefer to see the data yourself and write the explanations, just ask AI to provide the detail in the format you want to see it. Then you can write the explanations yourself.

Example Scenario

An executive notes that Travel and Expense (T&E) is up 30% from last month. Instead of asking accounting to investigate, they use the AI prompt.

User: Explain the month-over-month flux in the Travel and Expense account for the past two months.

AI Response: T&E increased from \$15,000 in October to \$19,500 in November, a 30% increase. The primary drivers are:

- **Increased Airfare:** \$3,000 of the increase is attributed to a single large purchase of airfare for the Sales team's upcoming Q1 kick-off event, which was charged to a new corporate card vendor.
- **Software Consolidation:** The remaining \$1,500 increase is due to the re-categorization of a monthly software subscription from the 'Administrative Expenses' account to 'T&E' for a new travel booking tool.
- **Anomalous Vendor:** There was a single, non-recurring \$300 expense for 'Lunch Meeting' from a vendor the company has not used previously, which may warrant further review.

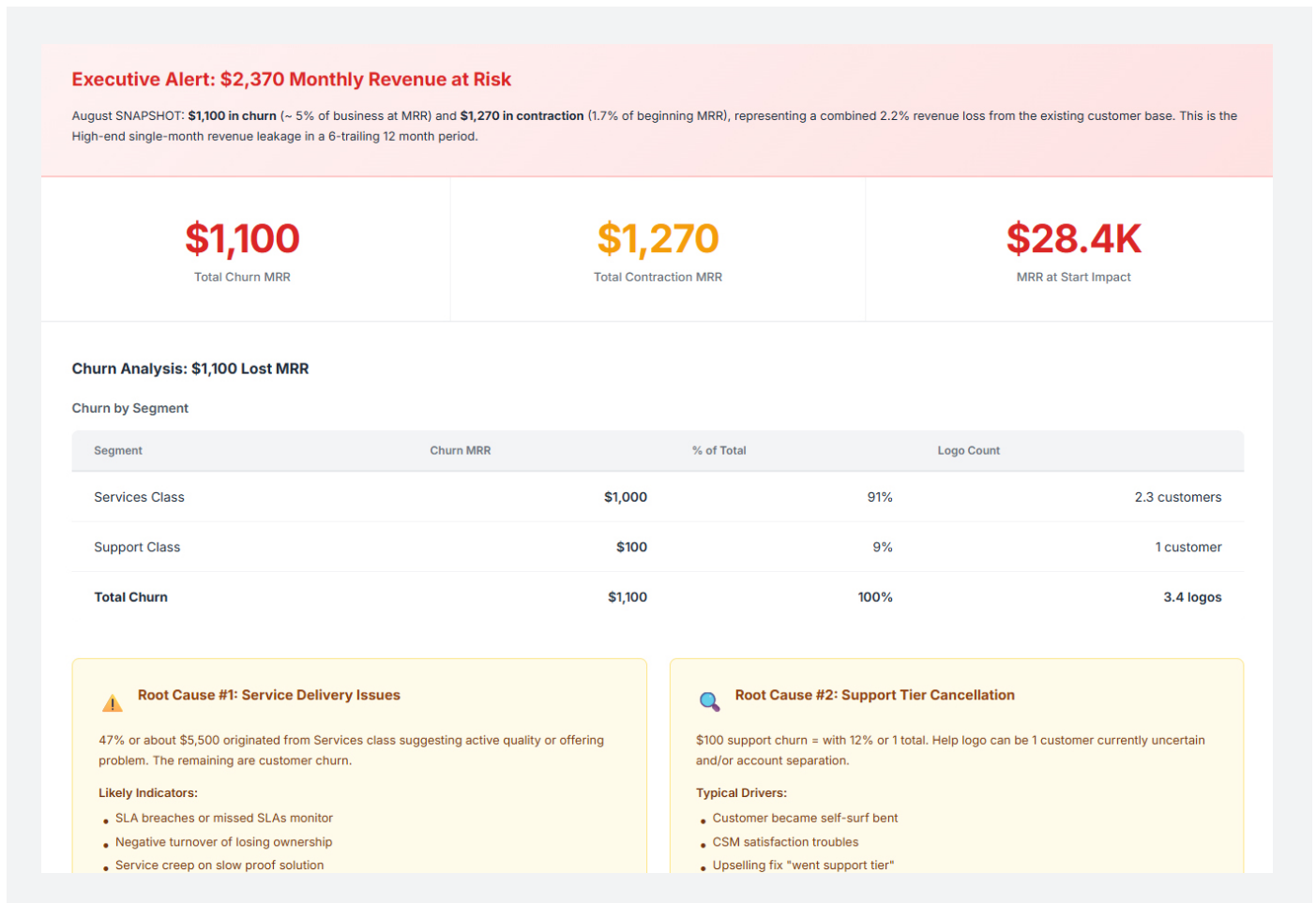
By providing an instant, contextual, and multi-faceted narrative, AI saves the finance team hours of work each month and helps the accounting team provide much better explanations for leadership.

CASE 5

CFO Dashboards and Action Plans

With a little bit of code, you can build custom MCP tools (cool interactive AI stuff) and get so much more out of your ERP. For example, it can build incredible dashboards and provide a root cause analysis for complex metrics like Net Revenue Retention.

Below is an example of the type of analysis you can now get out of your ERP with a fairly simple prompt. My mind is still blown from all the great analysis you can instantly get from your ERP now. [Here is a link](#) to the Claude artifact so you can see the whole thing.



Final Thoughts



Your ERP + AI is enabling finance teams to streamline a lot of processes.

Not only does it save time, but it enables you to do so much more than before since all of this previously took a lot of human time. And we know that almost all accounting/finance teams are constantly short on staff.

Two things I think every accounting team should do right now:

1. Follow my AI use case checklist to map out the best potential AI opportunities.
2. Get on demos with relevant vendors and see what they can do with those manual processes (free AI education).



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