

Turning Finance Operations into a Scalable AI-Native System

How the retailer built a reusable, governed foundation for invoice, document, and reporting workflows—without rebuilding for each new use case.

30%

8,000

96%

Returned weekly analyst capacity to higher-value work

Hours saved per year

Faster time to market than traditional build

AT-A-GLANCE

Company: Fortune 50 Retailer

Industry: Retail

Department: Finance

HQ / Location: Mooresville, NC

Scale: Fortune 50 retailer, enterprise finance operations

Challenge

The retailer's Finance team supports high-volume, high-risk operations across invoices, accounts, reports, and purchasing. Over time, critical finance workflows became fragmented across spreadsheets, document systems, and legacy platforms—forcing analysts to manually gather context before making decisions. As volumes increased, these inefficiencies compounded, creating operational drag and limiting how quickly finance could support the business.

Use Cases Transformed Into AI-Native

With UnifyApps, the retailer shifted from one-off automation projects to a reusable, AI-Native execution model. This changed the economics of delivery.

Invoice Reconciliation

⌚ BEFORE

Data scattered across systems; manual exception review

\$ COST

~8 minutes per exception; ~8,000 hours/year

⌚ AFTER

Sub-1-minute review with consolidated context

✓ BUSINESS IMPACT

Faster decisions without losing audit control

Excel Processing & Reporting

⌚ BEFORE

Manual report creation, formulas, validation, and formatting

\$ COST

8-12 hours per analyst per week

⌚ AFTER

Automated analysis and multi-format output

✓ BUSINESS IMPACT

Analysts focus on insight, not spreadsheets

Open Account Document review

⌚ BEFORE

Manual document checks across systems

\$ COST

Delays, inconsistent decisions

⌚ AFTER

Automated validation with unified context

✓ BUSINESS IMPACT

Faster decisions without losing audit control

Purchase Requisitions

⌚ BEFORE

Context fragmented across tools

\$ COST

Slower approvals, higher effort

⌚ AFTER

AI-assisted review within finance guardrails

✓ BUSINESS IMPACT

Faster approvals, lower operational friction

Scalable, Reusable Foundation

The team quickly scaled AI projects across Finance by reusing integrations, governance rules, and data objects including Invoice, Purchase Order, Account, and Vendor. This decreased the marginal cost with each new Finance use case.

Integrations Used

File Storage Systems



96% faster delivery

With UnifyApps, this Fortune 50 retailer saw time-to-value in weeks.

Previously, traditional builds had taken up to 12 months.

The core capabilities behind AI-Native transformation



Model-agnostic AI

Embedded AI without locking into a single model



Unified AI platform

Integrated data, workflows, and AI in one execution layer



Built-in governance

Auditability and controls included from day one



Reusable architecture

Shared integrations that cut the build cost for new use cases



Low-code delivery

Faster builds with smaller teams—without sacrificing reliability

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[Explore Use Cases →](#)



About UnifyApps

UnifyApps is the AI Agent and App Builder for the enterprise that empowers organizations to transform into AI-Native enterprises. The AI OS platform connects systems of record, knowledge, and activity, enabling enterprises to turn stalled GenAI pilots into scalable, production-grade solutions.