

Explore Rever: a CFO's guide to agentic AI finance

Rever's AI finance agents do the work. Your team keeps the final say.

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Rever reads the systems you already run and never writes to them. The zero-day scan checks the in-scope transactions and returns initial findings with their evidence, and fifteen specialist agents, coordinated by Eve, take on recovery, reconciliation and the close. Nothing leaves Rever until a person with the authority approves it.

This guide follows the product in the order you would meet it.

01 Your systems	02 Mapping Studio	03 Zero-day scan	04 Eve + agents	05 Every month
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What Rever is

Agentic AI finance automation, built by finance, for finance: AI agents that recover value, verify transactions and keep the close moving.

Finance teams do the same mandatory work by hand: check transactions against contracts and source documents, explain the differences, prepare the close and chase the rebates, credits and overcharges the company is owed. Rever is a **team of AI agents for finance** that does that work on the records you already keep, while your team keeps the judgment calls and the final approvals. Its home page puts the aim in four words: "Recover value. Maximise profit."

Fifteen specialist agents, coordinated by Eve, cover **ten use cases**. Value recovery comes first: rebates, credits, deductions and overcharges pursued to a verified outcome. The other nine are accounts payable, accounts receivable, **bank reconciliation**, balance reconciliation, period close, cash forecasting, inventory management, audit readiness and continuous monitoring.

Rever reads your systems and never writes to them, and only approved work leaves Rever. This guide is written for the CFO; the controller who keeps the pen and the PE sponsor each have an edition of their own.

The figures Rever publishes

FIGURE	WHAT IT MEANS
100% of in-scope transactions checked	Each in-scope transaction in the connected population gets the relevant checks; missing sources and blocked procedures stay visible

FIGURE	WHAT IT MEANS
The honesty ratio	Value recovered divided by value found
Five outcomes, tracked apart	Value identified, value recovered, leakage prevented, cash released, errors corrected

From rever.ai. These describe how Rever counts; your own Proof of Value supplies the numbers.

Connect Read-only connections to your ERP, banks and documents	Check 100% of in-scope transactions, by fifteen agents and Eve	Approve Findings reach your Inbox; your team keeps the final say
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In the words you already use

Your team has names for this work. The table gives Rever's name for each one and the agents that do it.

WHAT YOU CALL IT	WHAT REVER CALLS IT	AGENTS
Bank reconciliation, account reconciliation	Reconciliation workpapers	Matcher, Investigator
Three-way match	Matcher's three-document comparison	Matcher, Investigator
Duplicate payment check	A Spend Guard finding	Spend Guard
Recovery audit	Value recovery, with your approval	Entitlement, Deduction, Spend Guard, Revenue Assurance
Month-end close checklist	Period close	Close Orchestrator, Journal
Flux analysis	Flux Analyst's explanations	Flux Analyst
13-week cash flow forecast	The 13-week cash forecast	Cash Pilot
Audit readiness, the PBC list	Evidence packs and Records	Evidence, Auditor
Vendor rebate claim	A supported claim	Entitlement
Deduction management, short-pays	Deduction's resolution step	Deduction
Inventory reconciliation	Inventory management	Inventory
Canonical data model	The canonical record	Mapping Studio, Eve
Approval matrix, segregation of duties	Approval paths in Settings	Sentinel, Auditor
Continuous controls monitoring	Continuous monitoring	Sentinel, Steward, Auditor

Start with the systems you already run

Read-only connections to your ERP, banks and documents, built as direct, deterministic integrations.

Rever reads your ERP and leaves it in place. It connects read-only to NetSuite, Dynamics 365, QuickBooks, Stripe, your banks and your documents, or to a common database you already maintain.

Rever builds each connection as a direct, deterministic integration. No MCP server sits in between and no agent holds credentials, so the agents read only what the connection provides and your source data stays unchanged. Your ERP admin grants read access only: Rever never writes to your systems, and an approved journal entry comes back as an import file your team loads.

Your IT lead can ask for the security pack: the SOC 2 Type II report, the ISO/IEC 27001:2022 certificate, the architecture and the data-processing terms. The trust page lists the commitments: no training on customer data, evidence preserved before transformation, no human-readable personal data in model context, and tenant isolation. Data is encrypted at rest and in transit, with SSO, SAML and SCIM on Enterprise.

Where Rever runs and what stays where

Rever runs self-hosted in your environment, in a dedicated private cloud or in its managed cloud, with the same read-only rules in each. Your ERP remains the system of record. Records holds each original document once, linked to the work that used it.

Where to start

Choose one entity and the sources that matter first: for most companies, the ERP, the main operating bank accounts and, if you bill through it, Stripe. You agree the entity, systems and period with Rever's team before anything connects.

Your ERP + banks	Rever	Your approver
NetSuite, Dynamics 365, QuickBooks, Stripe, banks, documents. Read-only.	Direct, deterministic integrations. Agents prepare the work.	Approves in the Inbox. Approved entries come back as an import file your team loads.

Mapping Studio: your records, your rules

One canonical data model of the books, and the business context the agents work within.

Mapping Studio is where Rever maps your systems into one record. It maps the source tables and data in your ERP, banks and documents into Rever's canonical record of the books, the model every agent reads. On rever.ai this work sits under Connectors and mapping: deterministic connections, plus a complete map of your data that Eve uses as context.

The first output is the record. A NetSuite vendor bill, a line in a bank feed and a Stripe payout land in one place with their source identifiers kept, so an agent asked about a freight invoice can find its purchase order, its amendment and its payment without a person assembling the file. Records stores each original once, in canonical form and ready for diligence.

The second output is the business context, which Eve builds on that record: your business model, systems, commercial terms and accounting policies, with targeted questions where the records are silent. She traces each financial line to the business activity behind it, drafts the SOP for that process, and asks the process owner to confirm it before any agent works from it. The context makes a finding yours: Rever judges a price-drift exception at a distributor and the same exception at a clinic group against different terms.

Two outputs, one foundation

The canonical record: ERP tables and data mapped into Rever, linked to bank, processor and document sources, with source identifiers kept.

The business context: entities, commercial terms, accounting policies and approved SOPs, plus the materiality and approval paths you set in Settings.

Mapping questions come back to Mapping Studio with their evidence and a linked Inbox task, so a person on your team settles each one, and the zero-day scan starts once your mappings are approved. Agent Studio, covered later, builds new agents. Mapping Studio sets what they all work on: the fifteen agents and any you add read from it.

Canonical record ERP, bank and document data mapped once, source identifiers kept	Business context Eve's profile: terms, policies, approved SOPs, the materiality you set
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The zero-day scan: your first findings, with the evidence

The first pass over your connected records, and how it compares with an [accounts payable recovery audit](#).

The zero-day scan is the first pass over your connected records once read-only access is in place. After Eve builds your business context, the scan applies the relevant reconciliations, verifications and controls to the in-scope population, reveals initial findings with the evidence behind them, and repeats its checks after relevant syncs.

Nine procedures, in plain words

- Counts the populations, periods and control totals, and what it could not reach.
- Lands the accepted data, keeping source identifiers and blocking duplicates.
- Parks rejected or undecided data with a reason and a named next step.
- Compares journal counts and totals, source to landed, by entity and account.

- Reconciles the source trial balance to the canonical book, currencies included.
- Launches the approved verification and control baseline, one owner per check.
- Routes data failures to Steward and accounting differences to their owners.
- Repeats the tie-out after later syncs and remaps, keeping earlier results.
- Publishes what landed, parked, excluded or stayed unverified, with a summary.

Each finding carries its records, calculation and procedure, and missing sources and blocked checks stay visible instead of passing as clean. A recovery audit firm reviews past payments after the fact. On value recovery, the zero-day scan checks eligible purchases, deductions, payments and billing against the terms behind them, and your team approves any claim before it goes out. Rever promises no dollar amount and no percentage of spend, and it tracks corrections, such as an accrual that should have reversed, as errors corrected.

Connect	Scan	Findings
Read-only, set up with your team	Reconciliations, verifications and controls on the in-scope population	Initial findings with evidence; gaps stay visible

One case, end to end

A [three-way match exception](#) from signal to hand-back.

This is an illustrative case, not a customer result: a freight invoice that disagrees with its purchase order, followed from signal to the entry your team loads.

Signal. An invoice from FreightCo lands at \$4,812 against purchase order PO-1884 for \$4,502.

Match. Matcher compares the invoice, the purchase order and the receiving record field by field. The three disagree by \$310, so Matcher raises an exception for Investigator.

Investigation. Investigator traces the difference to its root cause and adds the documents the first three lack. Amendment A2, signed 28 June, added \$240 of fuel surcharge. A short shipment credits \$180. Each figure links to its source page.

LINE	AMOUNT	SOURCE
Purchase order	\$4,502.00	PO-1884
Fuel surcharge	+\$240.00	Amendment A2, signed 28 June
Short shipment	-\$180.00	Receiving record
Match	\$4,562.00	FreightCo invoice, traced to PO-1884 and amendment A2
Accrue	\$250.00	Balances the invoice; reverses on settlement

Draft. Journal prepares the entry: match \$4,562 and accrue \$250, with the support attached. The accrual reverses on settlement.

Your approval. The entry reaches your Inbox with its evidence and financial significance. A person with the authority for that amount approves it, and a material amount needs the second approval you set.

Hand back. Journal hands the approved entry back as an import file your team loads. Once it is loaded, Journal checks the resulting record against the source and the ledger. The Inbox keeps the decision and what happened next.

Recurrence. Investigator recommends a preventive control or SOP improvement that addresses the cause. If the pattern repeats, Eve proposes an SOP change and publishes it only after your approval.

Eve: your agentic finance manager

The coordinator of the fifteen agents: the **agentic finance manager** your team can ask.

Eve brings business context to the work. She connects the records, processes, policies and people behind your numbers, then assigns the right specialists to each finance task. She sits outside the fifteen and runs the team.

What Eve does

Builds the business profile from cited financial and operational evidence, and refreshes it as the business changes.

Drafts SOPs for each process and asks the process owner to confirm them before use.

Allocates the work: one lead agent and named supporting agents for each ledger, party and transaction family, with duties dispatched as events arrive.

Sequences your attention by materiality, risk and source confidence, and brings high-value opportunities, liquidity concerns and failed procedure tests to you.

Answers finance questions from current workpapers and Records, explaining uncertainty, conflicts and coverage gaps.

Improves the team by reviewing agent work and proposing SOP or role changes, which she publishes after approval.

What to ask her

Ask Eve what Spend Guard found this week and why, which items in your Inbox need you before the close, or what explains a movement in a balance. To create a new agent, describe the duty, and Eve interviews your team in Agent Studio.

Eve cannot approve her own proposals, create invoices, post journals, move money or bypass the agent responsible for an action. External requests wait for your approval in the Inbox.

Eve is where you can start

Rever's Free plan is the zero-day scan, self-serve, on the data you connect, with Eve answering questions about the scanned data. It includes read-only connections to your ERP, banks and documents, initial findings with their evidence, and unlimited users on the managed cloud. Business context, the specialist agents, Inbox actions and workbooks come with Growth, priced after a free Proof of Value.

Fifteen agents in five work groups

The roster of AI agents for finance, and what each one owns.

Each agent owns a defined area of finance work, with a published scope on rever.ai/agents: what starts its work, what it checks, who it hands off to, what it files and what stays with your team. Eve coordinates their context and responsibilities.

WORK GROUP	AGENTS AND WHAT EACH OWNS
Recover value and protect profit	Entitlement finds contractual rebates, credits, discounts and commissions that are due. Deduction checks short payments and deductions against invoices, agreements and delivery evidence. Spend Guard checks for duplicate invoices and payments, price drift and missed purchasing benefits. Revenue Assurance checks that delivered goods, services and contractual price changes are billed as agreed.
Verify the transaction, understand the difference	Matcher reconciles related records across contracts, orders, fulfilment, invoices, payments and ledgers. Investigator traces an issue to its root cause and recommends a correction that also addresses recurrence.
Keep the books and close moving	Journal prepares supported journals, accruals, reversals and invoice drafts, and hands approved journal entries back as an import file your team loads. Close Orchestrator keeps close tasks, reconciliations and sign-offs moving all month. Flux Analyst explains movements in revenue, costs, margins and balances.
Improve cash visibility and evidence	Cash Pilot builds a 13-week cash forecast and prioritises collections and working capital. Inventory reviews stock existence, ownership, movements, cut-off and valuation. Evidence keeps original records, calculations and source references connected to the work.
Keep the agent team accountable	Sentinel detects unusual changes and potential control abuse, including suspicious vendor-bank changes. Steward monitors system health and the financial impact of stale data, failed syncs and stalled tasks. Auditor tests whether agents followed approved procedures and whether controls worked.

How a duty runs

Each duty follows the same nine steps: a trigger arrives, readiness is checked, the procedure runs, reports and workbooks are published, issues become findings, decisions happen in your Inbox, only approved work leaves Rever, the outcome is verified once your team acts, and Home reports what changed.

Make it work the way your business works

Your materiality, approval matrix and SOPs, the agents that keep the team accountable, and Agent Studio.

Rever's manifesto names the floors it will not lower: read-only connections, approvals in the Inbox and evidence behind every number. They hold in every plan, Free included: Rever never writes to your systems; nothing leaves Rever without a recorded approval from an authorised approver; the identity that prepares an action cannot approve it; material amounts need dual approval; and every decision is recorded with its inputs, source records and approver.

Your settings

Everything above the floors, the materiality, the approval matrix and the SOPs, is yours to define. Each entity and user sets materiality and approval paths in Settings, and Enterprise adds a custom approval matrix. Each approval, question and send-back is a recorded decision in the Inbox, with what happened next.

An accountable team

Agents follow your approved SOPs, versioned when they change. A new agent starts as an observer. Eve reviews its performance against your SOP, promotes what performs and demotes what does not, and the record of both is yours to read. Auditor tests whether agents followed approved procedures and whether controls worked, and Steward watches system health. For a bank-detail change, Sentinel "prepares an independent human callback using a previously trusted contact and known-good details".

Agent Studio, early access

Your team carries work no product ships: a recurring chase, a one-time check, a procedure specific to the business. [Agent Studio](#), in early access on Growth Pro and Enterprise, turns it into a governed agent in four steps.

- 1. Describe the need.** Eve interviews your team about the duty, its evidence and its exceptions.
- 2. Eve builds the workflow.** She maps the steps to Rever's automations, records the SOP and names the agents.
- 3. The agent is deployed.** It works under the team's read-only connections and Inbox approvals.
- 4. Observe first, then earn the role.** Eve promotes or demotes the new agent on its results.

From the first scan to every month after

[Month-end close, flux analysis, the 13-week cash forecast and audit readiness](#), agent by agent.

The Proof of Value shows what the scan finds on a limited period of your data. The subscription puts the same agents on [every new transaction, every close and every claim](#).

A month with Rever

Every day. Matcher reconciles new bank, processor and ERP activity to its documents. Spend Guard checks for duplicates and price drift before the payment run. Sentinel watches for unusual changes. Your Inbox holds the findings that need you, each with its evidence.

Through the month. Entitlement recalculates rebates and credits as purchases land and assembles supported claims. Deduction tests short payments against invoices, agreements and delivery evidence. Cash Pilot builds the 13-week cash forecast and compares expected cash movements with actual outcomes; any sweep needs each required approval, and no agent moves money on its own.

At month-end. Journal prepares accruals, provisions and reversals with support. Flux Analyst ties each movement to its transactions and drivers. Close Orchestrator keeps tasks, reconciliations and sign-offs moving and routes material blockers and sign-offs to your Inbox without certifying an incomplete close.

For the auditor. Evidence assembles traceable evidence packs as the work happens, and Auditor tests the agents' procedures. Everyone who reviews, approves or audits the work can be in Rever.

One recovery, as rever.ai illustrates it

Entitlement checks a contract and the eligible purchases: \$1,200,000 of purchases at a 2% contractual rebate is \$24,000 of potential recovery. Evidence links the support, your team approves the claim, and Rever tracks it until cash is received or a credit is applied. Rever labels this an illustrative example, not a customer result.

How to judge the fit

Judge Rever on your own Proof of Value: the supported findings, their financial significance and the evidence behind each one. Once claims settle, the honesty ratio shows how much of the value found became value recovered, and Rever reports the five outcomes and that ratio each month.

Start with the zero-day scan

Your first step is a zero-day scan on your own records, run inside a free Proof of Value.

What happens next

- 1. Agree the scope.** Which entity, which systems, which period. Rever's team sets up the read-only connections with yours.
- 2. Eve builds context.** Your business model, systems, commercial terms and accounting policies, with targeted questions where the records are silent.
- 3. Run the zero-day scan.** The relevant reconciliations, verifications and controls run across the in-scope population, on a limited period of your data.
- 4. Walk through the findings.** Supported findings, their financial significance, what needs more evidence, and the actions required to pursue value.

What it costs

Rever's packages are Free, Growth Basic, Growth Pro and Enterprise. Free is the self-serve zero-day scan with Eve. Growth Basic runs the core agent workforce and a few selected agents for one entity, with a continuous close. Growth Pro runs all fifteen and adds Agent Studio in early access. Enterprise adds multi-entity, multi-ERP consolidation, self-hosting or private cloud, SSO and SCIM. Rever prices on scope, meaning entities, sources and agents, and everyone who reviews, approves or audits the work can be in Rever. Growth and Enterprise pricing follows the Proof of Value.

Bring three things

- **Your systems.** Which ERP, which banks, and whether you bill through Stripe.
- **One entity and one worry.** The close that runs long, the rebate programme nobody reconciles, the duplicate that turned up by accident.
- **The person who keeps the pen.** The controller or finance lead who would approve the work.

The read-only connection follows the scope you agree.

Register for a free Proof of Value at rever.ai/proof-of-value.

A short guide to the terms

Zero-day scan: the first pass over your connected records, returning initial findings with their evidence.

Proof of Value: Rever's free evaluation on a limited period of your data: agree the scope, Eve builds context, run the zero-day scan, walk through the findings.

In-scope population: the transactions your agreed scope covers; Rever checks 100% of them.

Mapping Studio: where Rever maps your ERP, bank and document data into its canonical record.

Connected record: Rever's one record of the work, kept in Records, with each original stored once and linked to the work that used it.

Eve: Rever's agentic finance manager, who builds the business profile, assigns the agents and routes decisions to your Inbox.

Agent Studio: where Eve turns a routine or a one-time ask into a governed agent. Early access, on Growth Pro and Enterprise.

Inventory: the agent that reviews stock existence, ownership, movements, cut-off and valuation.

Steward: the agent that watches system health: stale data, failed syncs and stalled tasks.

Auditor: the agent that tests whether the other agents followed approved procedures and whether controls worked.

Five outcomes: the categories Rever tracks apart: value identified, value recovered, leakage prevented, cash released and errors corrected.

Identified and recovered: two of the five outcomes, kept apart: a supported opportunity that still needs action, and cash received or a credit applied.

Honesty ratio: value recovered divided by value found.

The floors: the controls Rever's manifesto says cannot be lowered: read-only connections, approvals in the Inbox and evidence behind every number.

Recovery audit: a review of past payments and contracts, often by an outside firm, to find money a company overpaid or never collected, such as duplicate payments and unclaimed rebates. See [the zero-day scan article](#).

Three-way match: the accounts payable control that checks an invoice against its purchase order and the receiving record before payment; Matcher compares the three, and Investigator adds documents when they disagree. See [the three-way match article](#) in the controllers' edition.

Flux analysis: a review of how each account balance moved from one period to the next, with an explanation for each movement above a set threshold; Flux Analyst ties each movement to its transactions and drivers. See [the flux analysis article](#).

Month-end close: the work of reconciling accounts and posting accruals and adjustments so a finance team can lock and report a month's books; Close Orchestrator keeps the tasks and sign-offs moving and makes blockers visible. See [the month-end close checklist article](#).

13-week cash flow forecast: a projection of cash receipts and payments for each of the next 13 weeks, rolled forward weekly, that finance teams use to time payments and watch liquidity. Cash Pilot builds Rever's 13-week cash forecast. See [the 13-week cash flow article](#).

Audit readiness and the PBC list: audit readiness means having the support for each balance ready before the auditor asks; the PBC (prepared by client) list is the auditor's request for those schedules and documents. Evidence assembles traceable evidence packs as the work happens. See [the audit readiness article](#).

Canonical data model: a single standard structure that data from different systems maps into, so each source describes a vendor, an invoice or a payment the same way; Rever's is the canonical record, mapped in Mapping Studio. See [the Mapping Studio article](#).

Suspense account: a temporary general ledger account that holds amounts a team cannot yet classify, such as an unidentified bank receipt, until someone clears each item to its proper account. See [the suspense account article](#).

Intercompany reconciliation: matching the balances and transactions between entities of the same group so they agree and eliminate on consolidation. Rever agrees intercompany balances with evidence, and Enterprise adds multi-entity consolidation.

About this guide

Product facts follow the [home](#), [product](#), [agents](#), [zero-day scan](#), [Eve](#), [pricing](#), [trust](#) and [Proof of Value](#) pages on rever.ai. The cover line is the closing line on every rever.ai page. The freight case is illustrative, not a customer result, and the rebate example is rever.ai's. Requests to Eve are illustrative;

diagrams are editorial.

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