

UNIT4
In business for people

Unit4 and AI

Purpose-driven work through Pragmatic AI



Contents

Executive Summary	3
Decades of AI Experience	
Unit4's AI mission	4
A modern platform to support the organization	6
Finance: Enhancing accuracy, efficiency, and impactful analysis	
Projects: Streamlining essential processes and optimizing resources	
Procurement: Optimizing invoicing	
HCM: Utilizing your people through better planning and skills tracking	
User experience and human-centric approach	10
Using customer feedback and data	
Better user journeys with Ava, Unit4's Advanced Virtual Agent	
Data privacy, security, and ethical considerations	
Future outlook	
Join our AI journey	
In conclusion	



Executive summary

At Unit4, we believe that organizational change is the cumulative effect of individual transformations. Your teams, your work, and your results will transform when your people feel safe, empowered, and ready to adopt new AI technologies. That's why Unit4's AI innovation is driven by three core principles - AI that works where you work and thinks like you think, seamless adoption for maximum results, and AI that is safe, responsible, and transparent.

Decades of AI Experience

Unit4's commitment to responsible AI isn't new—we've been building with AI for decades. This extensive experience informs our pragmatic approach to AI integration, ensuring we deliver solutions that are not only innovative but also proven, reliable, and ready for immediate implementation in service-centric organizations.



Unit4's AI mission

The introduction of AI and automation marks a pivotal shift in the way ERP systems function - they drive productivity, enhance large volume data processing, automate routine tasks, personalize experiences, and provide insightful analytics. AI and ERP integration addresses the inherent limitations of traditional systems and unlocks tremendous potential for improved decision-making, operational efficiency, and a more intuitive, responsive user experience.

This evolution leads to a more adaptive, intelligent, and user-centric ERP, introducing new avenues for organizational growth and competitive differentiation.

At Unit4, our focus is people. Since 2015, we've been dedicated to AI and automation that works where your users work, rather than requiring them to follow outdated ERP user experiences. We empower service-centric organizations and their teams to concentrate on what really matters. Our strategy delivers pragmatic AI solutions that your teams will be excited to use, will find easy to use, and will empower them to focus on what matters.

AI that adapts to how you work

Behind every transaction, every workflow, every data point, there's a person trying to make something better. We've delivered user experiences designed specifically for how each person needs to use the ERP:

- **Power users** who do deep work in the ERP—payroll managers, FP&A analysts, project resourcing administrators—rely on configurable and extensible user interfaces with AI-powered proactive issue detection and context-aware predictive intelligence.
- **Business users** who use the system less frequently but for equally important work benefit from intuitive, web-based interfaces with AI that makes experiences faster and more efficient.
- **Casual users** whose primary job isn't ERP-related can complete tasks like approvals and time-off requests through Ava, our Advanced Virtual Agent, in Microsoft Teams—keeping them out of the ERP entirely so they can focus on their core work.

Because sometimes the best user experience is no user experience at all.

Defining the future

Our philosophy centers on Human-Centered Design and the practical application of AI, tailoring our Smart Experiences and automation strategy to meet the unique needs of our users.

By enhancing key operations in finance, planning, and human resources, we aim to significantly reduce the time and errors involved in tasks like invoicing, payroll, expenses, and absences.

Our goal is to automate 50% of ERP tasks within the next three years, prioritizing solutions that accelerate task completion and improve precision, directly empowering users to work more efficiently and effectively.

Unit4 AI Goals:

>30%

reduction in time-on-task

>50%

reduction in errors with >60%
increase in speed to resolution

Our focus areas for high impact

Efficiency Enhancement: Continuously improve and expand our utilization of AI agents to streamline tasks and automate data input in finance, procurement, and payroll, reducing manual labor and enhancing productivity.

Accuracy Augmentation: Expand AI-driven error detection and anomaly detection mechanisms to ensure precision in critical functions like accounting and payroll, while leveraging AI for data analysis to extract actionable insights in areas such as FP&A and project staffing.

Our AI Philosophy. Pragmatic AI for purpose-driven work

AI that works where you work: We develop AI that adapts to how your teams work, providing solutions that integrate seamlessly into existing workflows without requiring extensive retraining.

Effortless adoption: We deliver digestible, practical, and impactful technology that works out of the box and is configurable using Unit4's low-code and no-code technologies, ensuring even the most skeptical team members can adopt automation safely.

Safe, responsible and transparent AI: We aren't just compliant with EU AI regulatory policy—we lead the curve as data custodians, ensuring your data, your clients' information, and your reputation remain secure.

As we continue our journey to realize this vision, Unit4 is not merely committed to revolutionizing ERP experiences; we're making AI and automation a human-centered evolution. Our goal is not just technological progress but holistic empowerment for organizations and individuals in their service-centric pursuits.

As we navigate the possibilities and address the challenges of AI, our primary goal at Unit4 is to maintain human oversight and build user trust through AI models that are transparent, reliable, and effective.

This whitepaper details how we are turning these ambitious goals into tangible realities, aligning our technology with the human-centric values of both our organization and customers.

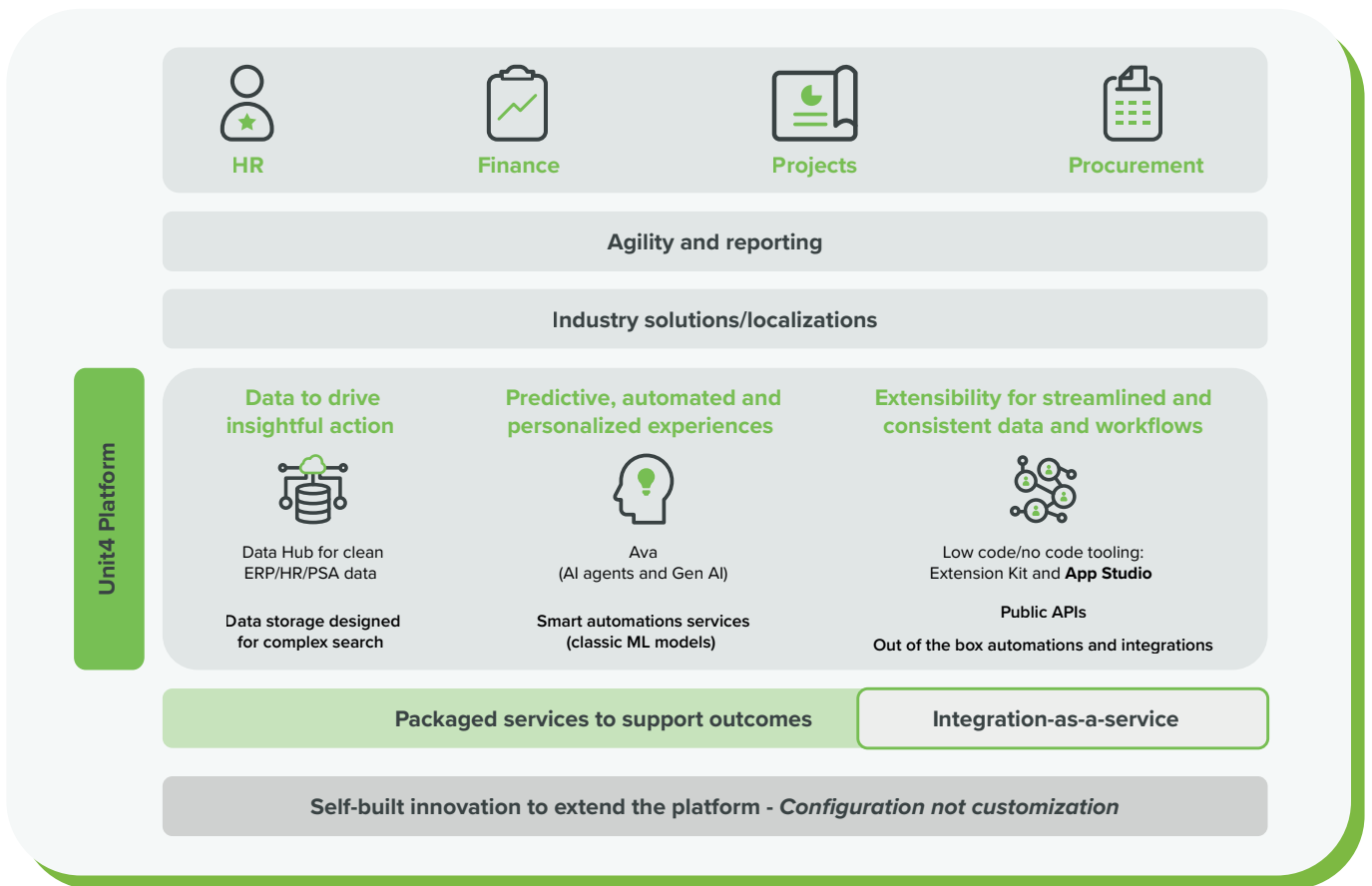
Our mission involves constant innovation and the integration of advanced AI and UX best practices into our ERPx system. By automating meaningful tasks and enhancing user satisfaction, we empower our customers to achieve greater operational efficiency and strategic success.



A modern platform to support the organization

We're continuously investing in our platform, which leverages Microsoft Azure platform capabilities, to provide Unit4 customers with the latest technology to enable success. We've built a scalable and flexible architecture that enables us to leverage AI capabilities through a focus on data and an API-first approach.

A next-gen Cloud platform that adapts to your needs



The efficacy of AI hinges on the quality, accessibility, and integration of data. Unit4's Data Hub serves as a central foundation for managing and leveraging data, ensuring that AI-driven insights are both accurate and actionable.

Designed to meet the challenges of today's complex data ecosystems, the Data Hub seamlessly integrates with Unit4 ERPx, providing a single source of truth for critical people and financial data.

Machine Learning and advanced AI technologies, such as Large Language Models (LLM), are key to enhancing our ERP solutions. Our integration of LLMs like GPT5 enables more natural and intuitive user interactions, aiding in effective information retrieval.

These technologies undergo rigorous testing and development, ensuring seamless integration with existing ERP functionalities and furthering our commitment to innovation. For example, with Unit4's Extension Kit, you can seamlessly connect your current external applications with your Unit4 ERP system.

Furthermore, App Studio, our no-code tool designed for customers to construct their own interfaces and applications (part of Unit4's Extension Kit), harnesses the AI capabilities integrated within the Unit4 platform.

Examples of Unit4 Smart Automation Services live or coming soon:

- **Ava integration:** Unit4's Advanced Virtual Agent enables task completion through Microsoft Teams chat, bringing work to users rather than requiring them to enter the ERP system.
- **Form Analyzer:** Examines content of forms to identify unusual information that requires review.
- **Smart Value List:** Suggests values based on users' past selections, prioritizing relevant suggestions.
- **Smart Classification:** Automates the categorization of objects by recognizing and grouping.
- **Fraud Detection:** Analyzing transaction data for patterns and anomalies.

Finance: Enhancing accuracy, efficiency, and impactful analysis

When it comes to the financials, accurate and timely processing is key for any organization. Our aim is to drive enhanced user experiences without compromising on accuracy. For example, we employ Machine Learning for anomaly detection in invoice processing, streamlining financial operations, and reducing errors. We are working on automating key financial tasks such as bank statement processing, direct debits, and tax determination, utilizing AI to recognize patterns and aid your people in delivering accuracy at speed.

Projects: Streamlining essential processes and optimizing resources

To ensure your projects are hitting key target metrics such as budgets, timelines and quality we're utilizing advanced AI capabilities to streamline data input and processing. This ensures the efficient matching of individuals possessing the requisite skills to your project assignments, thereby conserving valuable time and energy for your project and resource managers. We're combining core data from across your organization to help you utilize your resources in the best ways, ensuring successful completion of your projects.

Procurement: Optimizing Invoicing

By leveraging AI, we have now been able to substantially enhance efficiency, accuracy, and cost-effectiveness within the invoice processing domain.

AI-powered automation optimizes recurring tasks and approvals, minimizing manual efforts and maximizing accuracy. Intelligent data extraction capabilities facilitate quicker processing and analysis of invoice data. Additionally, AI can detect anomalies or discrepancies in invoices, reducing the risk of financial loss or fraudulent activity. Such proactive measures contribute to a more robust and error-resistant procurement system.

Our integration of AI technologies not only expedites the invoice processing cycle but also creates a transformative shift towards a more agile, data-driven, and strategically aligned procurement ecosystem.

Unit4 AI Goals: Invoices

- 30% time reduction in handling invoices
- 50% reduction in effort required to resolve invoice issues
- 60% time saved on amending invoices with errors
- 50% reduction in time to identify invoice delays and responsible parties
- 40% faster response to supplier inquiries about invoices
- 50% quicker notification for new invoices in the system
- 90% increase in efficiency for multiclient invoice handling

HCM: Utilizing your People through better planning and skills tracking

Your people are your biggest asset. We've been focusing on developing the user experience for employees, people managers, payroll administrators and HR leaders to improve the way you work through enhanced user interfaces and automation. Moving forwards, we are evaluating the use of AI to support key areas such as skills management, where a central repository is maintained with new employee skills gained and rated both internally and externally. We can then see huge benefits in being able to perform accurate skills gap analysis to drive your staffing strategies and proactive recommendations for the right people to match your project requirements. Helping you to utilize, motivate and retain your top talent, as the needs of your organization change over time.

Unit4 AI Goals: Payroll Processing

- 30% time saved through streamlined processes.
- 50% fewer manual corrections, reducing errors and warnings

Unit4 AI Goals: Expenses

- 60% increase in efficiency with fewer interactions required

Unit4 AI Goals: Absences

- 31% more efficient through simplified interactions
- 55% faster completion of absence-related tasks
- 48% higher task completion rate, improving overall execution

FP&A: Enabling better data visualization and storytelling with AI-powered insights

We're utilizing AI to help our customers communicate insights from their financial data more easily using AI-enabled FP&A tools. Users can compile notes, generate automated insights, and create compelling data visualizations that identify trends at a glance. This enhanced understanding of underlying data facilitates better decision-making and enables finance teams to tell more impactful stories with their data.



User experience and human-centric approach

The key to leveraging AI advancements lies in our deep understanding of the unique needs of individual users within organizations. Our focus is on tailoring our ERP solutions to meet these specific requirements and challenges.

By prioritizing the end users' experiences and the speed at which they can complete tasks, we ensure our technology not only keeps pace with the digital age but also drives significant improvements in efficiency and effectiveness across the board.

Using customer feedback and data

At Unit4, we regularly gather customer feedback through various channels, including our community platform, user groups, and testing platforms. We also use research methods like ethnography to understand how users engage with our ERP applications in their workplaces. This valuable information guides us in shaping user experiences, refining AI frameworks, and enhancing system interactions.

Once we spot opportunities for improvement, we simplify ERP interactions using standard AI tools or custom machine-learning models. An example of these models suggests personalized options to users, making form-filling more straightforward. Other models identify errors or unusual patterns, promoting better decision-making and ensuring data integrity.

60-70%

of work activities could be automated by current generative AI and other technologies.¹

¹Economic potential of generative AI | McKinsey

Better user journeys through conversational AI

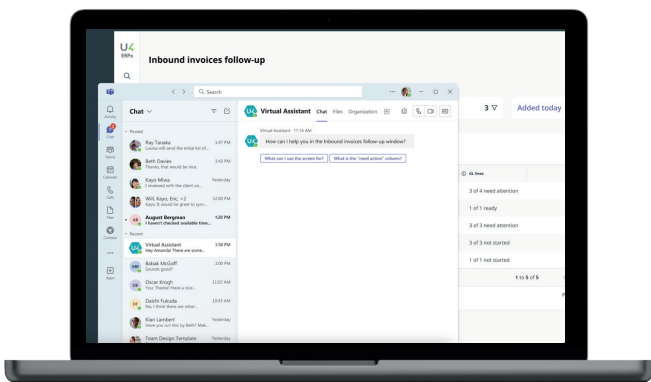
A prime example of how we've transformed user feedback into innovative solutions is Ava, our Advanced Virtual Agent. This application directly responds to our users' need for more intuitive and intelligent support within their ERP environment.

Understanding that our users are people who serve, not people who build software, we've designed Ava to amplify service without overwhelming users with complex new technology. Ava works out of the box and doesn't require users to learn new interfaces or build their own solutions.

Ava leverages AI to provide actionable insights and streamline workflows through familiar channels like Microsoft Teams. Ava can display alerts about issues detected by Unit4 ERP, offer smart recommendations based on data analysis, and facilitate easier communication by allowing users to chat with others involved in the workflow. Ava guides users in completing tasks and can automate certain steps, increasing productivity and decision-making efficiency while keeping users focused on their core work.

For many casual users, an ever-growing number of tasks can be completed entirely through Ava in Microsoft Teams, eliminating the need to enter the ERP system at all.

Our overall goal is to create adaptive, contextual experiences that focus on the real problems customers face. The successful integration of AI technologies into everyday work will result in a transformative impact on business processes and roles.



Data privacy, security, and ethical considerations

At Unit4, our commitment to putting people at the center of AI innovation for ERP drives our approach. Upholding data privacy, security, and ethical considerations is paramount in our strategy. We strictly adhere to regulations such as GDPR and the EU AI Act, continuously updating our practices to align with evolving legal and ethical standards. Our security measures are robust, designed to protect against cyber threats and data breaches, thereby ensuring the security and privacy of our clients' data.

Moreover, we recognize the ethical implications of AI deployment, especially in decision-making processes. Transparency and accountability are core principles guiding our AI development. We prioritize clear communication with users regarding when, how, and why AI decisions are made. Detailed technical documentation and summaries of data sets are maintained to ensure transparency and mitigate biases. Compliance with EU copyright law is ensured, with detailed training content summaries published.

Accuracy is another key focus area for us. We strive to deliver reliable and accurate AI outputs, providing clarity on the level of accuracy and implementing mechanisms to monitor and maintain system accuracy over time. Human oversight mechanisms are also in place, allowing users to understand, monitor, evaluate, and override AI decisions when necessary.

In terms of data governance, we provide comprehensive documentation summaries on the data sets used for training, ensuring transparency and compliance with regulations related to personally identifiable information (PII). Additionally, our cybersecurity measures are tailored to mitigate risks appropriate to the circumstances. Technical solutions are implemented to ensure resilience against unauthorized attempts to exploit system vulnerabilities.

Our commitment to compliance extends to high-risk sectors such as the public sector, banking, and insurance, where adherence to best practices outlined in the EU AI Act is highly recommended. By prioritizing transparency, accuracy, and compliance, we aim to build trust with our users and maintain the integrity and reliability of our AI-enhanced ERP systems.

Future outlook

Our commitment to pragmatic AI means we don't release solutions that aren't designed in collaboration with our users and vetted by their teams. We continuously seek collaboration partners who can share opportunities, challenges, and provide feedback on our innovations—because the best AI solutions emerge from genuine partnership with the people who will use them.

As we continue to integrate AI and automation into our ERP solutions, we are mindful of the challenges that accompany such technological advancements. The key is to ensure the seamless integration of AI into existing business processes without disrupting the operational flow. Additionally, we must address concerns regarding the reliance on AI for decision-making, ensuring that human oversight remains a critical component. Another significant challenge is continuously evolving our systems to keep pace with rapid technological advancements while maintaining user-friendliness and accessibility.

Looking towards the future, we are very optimistic about the potential of AI and automation to revolutionize ERP systems. We anticipate further advancements in AI capabilities, leading to more sophisticated and intuitive ERP solutions, allowing us to deliver on our vision to provide pervasive self-driving ERP solutions.

Join our AI journey

We're looking for collaboration partners to help shape the future of AI in ERP. If you're interested in being part of our pragmatic approach to AI development and want to help us create solutions that truly work for service-centric organizations, we invite you to engage with us. Together, we can ensure that AI amplifies human potential rather than replacing it.

In conclusion

Unit4's integration of AI and automation represents a thoughtful evolution in enterprise resource management, focusing on practical adoption and delivering proven results. By addressing critical areas like finance, projects, procurement, HR, and payroll, Unit4 empowers mid-market service organizations to streamline operations, enhance decision-making, and achieve meaningful outcomes.

Our pragmatic approach ensures that AI works seamlessly within existing workflows, enabling faster financial processing, optimized project resourcing, smarter procurement, and efficient HR and payroll management.

Rooted in human-centered design, ERPx is built to meet the real-world needs of industries such as professional services, education, and the public sector—helping organizations focus on their mission while achieving measurable impact. With Unit4, AI is not just a feature; it's a trusted partner in driving success.

For more information go to:

unit4.com

Copyright © Unit4 N.V.
All rights reserved. The information contained in this document is intended for general information only, as it is summary in nature and subject to change. Any third-party brand names and/or trademarks referenced are either registered or unregistered trademarks of their respective owners. WP251113INT

UNIT4
In business for people

UNIT4
In business for people