Press release

Esker Introduces the Synergy Agentic Framework for the Office of the CFO

Esker builds on Synergy AI and its trusted transactional platform to add autonomous execution, conversational finance, and governed connectivity across source-to-pay and order-to-cash

LYON, France, and MADISON, Wis. — September 9, 2026 — Esker, the leading AI Automation Suite for the Office of the CFO, today unveiled its Synergy Agentic Framework, a governed agentic layer built on its Source-to-Pay and Order-to-Cash solutions. Building on Esker's existing Synergy AI, the Synergy Agentic Framework adds new agentic capabilities and advances the company's vision for governed autonomous finance: AI that acts, finance that talks, and autonomy that's governed.

For finance leaders managing growing workloads across increasingly complex systems and teams, the Synergy Agentic Framework removes repetition to help improve working capital, accelerate cash conversion, increase productivity, and strengthen control without adding proportional headcount. Esker has embedded Synergy AI in finance workflows for years, helping automate document recognition, data extraction, matching, anomaly detection, auto-coding, and prioritization. Agentic AI capabilities include a new layer of reasoning, orchestration, and autonomy, combining Synergy AI, trusted transaction context, workflows, and business rules to execute broader sequences of work. Rather than relying on standalone AI agents that automate individual tasks, the Synergy Agentic Framework connects specialized Business Agents, Conversational Finance, human-defined governance, and performance data, enabling work to be executed and governed through one shared operating layer.

"Finance leaders are seeking trusted solutions that can coordinate work across functions while preserving control, rather than a disconnected suite of AI tools," said Eric Bussy, Chief Marketing Officer and Head of Product Management at Esker. "With the Synergy Agentic Framework, Esker is helping the Office of the CFO do just that: use AI as a governed extension of their finance team, from automating tasks to fully orchestrated agentic workflows that support decision-making."

From task automation to agentic execution

Within the Synergy Agentic Framework, Business Agents move repetitive execution out of human task queues while allowing teams to retain control over judgment, policy, and exceptions. Across source-to-pay and order-to-cash, Business Agents can identify invoice exceptions, route approvals, prioritize collections, assess credit risk, support cash application, resolve claims, and help customer service teams respond faster to inquiries.

Customers using Esker's existing automation solutions have reported measurable improvements, including more than 90% touchless invoice processing, over 40% decreases in DSO, and more than 3x faster approvals, dispute resolution, and order processing. The Synergy Agentic Framework is designed to extend this automation from individual tasks toward broader sequences of governed execution.

One governed agentic framework for the Office of the CFO

The Synergy Agentic Framework uses shared context, intelligence, and control to connect three capabilities: act, talk, and connect:

- **Act — Autonomous execution across workflows:** Business Agents combine Synergy AI models and predictions with the rules, workflows, and actions best suited to each mission, performing repetitive work across source-to-pay and order-to-cash and escalating decisions that require human judgment.
- **Talk — Conversational interactions with finance processes:** Conversational Finance gives users one simple entry point to finance. Users state what they need in natural language, and the Synergy Agentic Framework connects the request to the right context, workflow, or Business Agent to retrieve information, guide intake, or execute a governed action. The interaction is bidirectional: the platform can also engage users when approval, clarification, or confirmation is required, for example, when an invoice needs urgent approval or when receipt against a purchase order must be recorded.
- **Connect — Governed access to the enterprise ecosystem:** The Synergy Agentic Framework makes selected Esker finance capabilities available to people, systems, and external agents while identity, permissions, business policies, and resulting actions remain governed within Esker.
- **Common foundations —** Context, intelligence, control, and assurance: Synergy AI and trusted transaction context inform each request and action, while identity, permissions, policies, approval boundaries, evaluation, and auditability govern how and when agents can act. Esker's Data Lake and Benchmark Intelligence use KPIs, performance history, and anonymized peer benchmarks to identify gaps, measure results, and feed insights that agents and finance leaders can use to improve execution over time.

Esker, Inc.
1850 Deming Way, Suite 150
Middleton, WI 53562 USA
Tel: (608) 828-6000
www.esker.com | info@esker.com

Press Contact: Brian Jaeger
Tel: (352) 682-7636 | eskerpr@walkersands.com

The Synergy Agentic Framework is also designed to operate as part of customers' broader technology ecosystems. Through APIs and emerging standards such as Model Context Protocol (MCP) and Agent-to-Agent (A2A), Esker can securely connect its finance workflows and agents with enterprise AI, LLMs, ERP, and CRM environments, while keeping access, permissions, and resulting finance actions governed within Esker. This keeps Esker central to finance execution even when another ecosystem owns the starting experience, while external agents consume controlled capabilities rather than gain direct access to protected systems.

“Most AI tools assist users within a single task or application,” said Jean-Jacques Bérard, Chief Product and Technology Officer at Esker. “The value of an AI agent does not come from the model alone. It comes from combining the right intelligence with trusted transaction context, business rules, and governed execution. Our Synergy Agentic Framework coordinates work across source-to-pay and order-to-cash processes and different systems, while keeping finance leaders in control.”

Probabilistic reasoning, deterministic execution

Agentic AI introduces a new level of reasoning and adaptability, but financial execution must remain consistent, controlled, and fully traceable. The Synergy Agentic Framework anchors AI reasoning in Esker’s transactional foundation, where workflows, business rules, permissions, validations, and audit trails ensure that every approved action is executed consistently, within clearly defined boundaries, and with a fully traceable outcome. This distinction is particularly important when financial data and transactions are involved.

Advancing Governed Autonomous Finance

The Synergy Agentic Framework represents Esker’s next step toward Governed Autonomous Finance, moving organizations beyond isolated automation toward a connected model where AI executes work while people retain control over objectives, policies, and higher-risk decisions.
By combining Synergy AI with agentic execution, trusted transaction context, conversational interaction, governance, and performance intelligence, Esker is helping organizations build finance operations that can adapt as business needs evolve. The goal is not one model or agent but giving the Office of the CFO a foundation to scale AI responsibly while staying agile and in control.