



WELCOME TO

BLUEPRINT 4D

P-052290

PRESENTED BY QUANTUMVALE COMMUNITY

JD Edwards + AGENTIC AI: The Future of Enterprise Intelligence



May 4-7, 2026
Hilton Anatole in Dallas TX

Who Am I?

Manuel Neyra

VP of AI and
Products



- ✓ 30+ years in JDE ecosystem
4+ years at ERP Suites enabling transformational value for customers.
- ✓ Previously - member of the JD Edwards Product Organization for 26+ years.
- ✓ Software Engineer, Architect, Application Manager, Product Management, Product Strategy, Managed JD Edwards Worldwide Partner Ecosystem, Sponsored JD Edwards customer projects.
- ✓ Collaborating with OCI team to develop agentic AI solutions

We Help Our Customers Realize IT



Cloud Hosting

Public, private and hybrid cloud solutions



Managed Services

ERP system management with first-rate response times



Agentic AI & Gen AI

Integrating your business data with emerging technologies



JDE Consulting

Develop, implement, and support JDE applications



EPM Services

EPM consulting, advisory, and managed services

ERP Suites AI Vision

01

Fully Managed SaaS Delivery Model

We handle the technology, platform, and licensing—so you don't have to.



05

Built on Trusted OCI Technology

Powered by Oracle Cloud Infrastructure for strong security, reliability, and performance.

ORACLE
Cloud Infrastructure

One Team, Full Expertise

02

Our AI, OCI, advisory, and JDE application teams work as one to understand your needs and deliver solutions that fit your business.



04

AI & Analytics Platform

Whether you need standard solutions or custom use cases, it all runs on a single, unified platform.



Powered by Agentic AI

03

Our solutions leverage agentic AI—combining intelligent agents and advanced analytics to take action, and support decision-making.



ERP Suites AI & Agent Strategy

- Targeted Use Cases for AI
- Value & Return on Investment
- Deliver solutions that manage end to end processes
- Semi-Autonomous (human in the loop) & Autonomous
- Proactive instead of reactive recommendations
- Collection of agents with broad cross-functional reach
- Strong security, governance, compliance
- Productized & custom solutions
- Continuous Innovation



WHY DIGITAL WORKERS?

Why Agents

What are Agents

When Agents

How Agents

Q & A

erp
suites

Why DIGITAL WORKERS?



Transitions systems from answering questions to getting work done



Agentic systems can reason through multi-step tasks, use tools, interact with business systems, and act with and without human oversight.

Strongest Business Cases:



Productivity at workflow level (not just task level)



Faster execution and lower operating costs



Better use of enterprise knowledge and systems



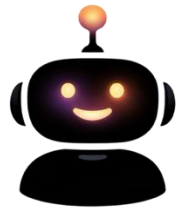
A path to innovation and competitive advantage



Strategic capability



Automate judgement-intensive work vs. repetitive tasks



AI AGENTS

FOR JD EDWARDS



Continuous Innovation



Higher Employee Productivity



Scalable Digital Workforce



Smarter Risk Mitigation



Faster, Tangible Time to Value

WHAT ARE DIGITAL WORKERS?

Why Agents

What are Agents

When Agents

How Agents

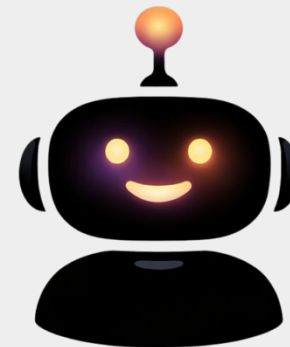
Q & A



Digital Workers for JD Edwards

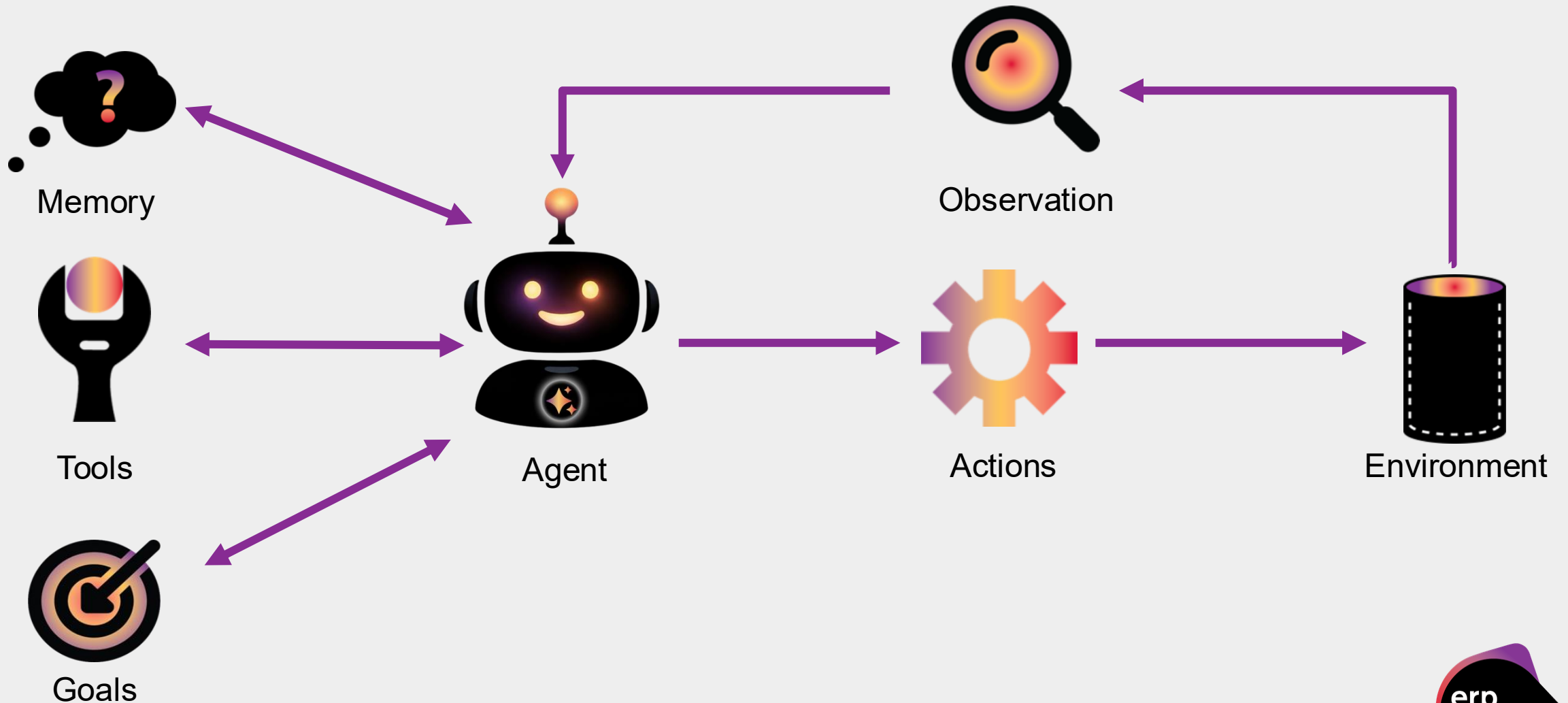
ERP Suites AI Agents are goal-driven digital workers that plan and execute tasks in JDE.

- ✓ Secure, auditable AI designed for JDE and other enterprise systems
- ✓ Break down tasks into goals and orchestrate (don't just answer questions)
- ✓ Start with human review and progress to full autonomous execution
- ✓ Call tools, APIs, MCP, and interact with other systems
- ✓ A scalable digital workforce you can expand over time



AI AGENTS
FOR JD EDWARDS

Agentic AI Architecture



ERP Suites Agentic AI Foundation

Purpose Built for Value, Powered by Oracle & OCI



ORACLE CLOUD INFRASTRUCTURE

ERP SUITES AGENTIC AI PLATFORM



JD Edwards EnterpriseOne

Orchestrator • Business Logic • Master Data • Integrations

ORACLE
JD Edwards
EnterpriseOne

 **Autonomous Agents**
Self-learning digital workers

 **Document Vision**
PDF & email extraction

 **Intelligence Hub**
Dashboards & scorecards

 **Exception Engine**
Smart routing & resolution

 **Confidence Scoring**
Human-in-the-loop controls

 **Real-Time Monitoring**
Live dashboards & alerts

 **Master Data AI**
Cross-reference validation

 **Extensible APIs**
3rd party & ISV ready

Gen AI Services

Compute

Database

Security

Governance

API Gateway

Networking

Built for JDE & Other Enterprise Solutions • Powered by OCI • Extensible by Design

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Digital Worker Security



Secure by Design

- Data stays within OCI (no public LLMs)
- No service credentials exposed (secured in Vault)
- Only approved actions can be executed
- No ad hoc access to JDE



Controlled & Traceable

- Inputs validated before reaching JDE
- Actions limited to predefined operations
- Multiple checkpoints for requests
- Full audit trail from request to transaction



Enterprise Ready

- SSO + MFA integration (SAML/OIDC)
- Enforces JDE user-level security
- Private network deployment
- Logging, monitoring, and alerts

Digital Worker Governance



Visibility & Inventory

- Single agent registry across the enterprise
- Ownership, capabilities, and data scope tracked
- Lifecycle managed: build, promote, retire
- Per-customer compartment isolation



Policy & Control

- Configurable autonomy levels (advise, approve, auto)
- Threshold & supplier whitelisting controls
- Human-in-the-loop approval gates
- Policy changes versioned and reviewable



Audit & Evidence

- One-line decision log for every action
- Identity preserved end-to-end into JDE
- Tamper-evident audit trail across layers
- Auditor-ready exports (SOX)

Built for the Enterprise



Enterprise + JDE

- Agents built for JDE + Multi Enterprises
- Support agents (email, secure file transfer, EDI)
- Per-user identity flows into JDE security
- Honors JDE roles, holds, and approval rules



Modular & Flexible

- Start with one agent, add more over time
- Productized agents plus custom use cases
- Per-service pricing — no forced bundles
- Open-standards-aware architecture



SaaS-Delivered

- Fully managed — we run the platform
- Continuous innovation — you get every release
- Predictable monthly subscription
- Lower operational burden

Agentic AI Agents: Available & Being Built

Finance Agents to help Optimize Period End Close



Payables Agent

Automates invoice intake, automatically creates voucher in JDE, and completes 3-way-matching



Planning Agent

Collects and analyzes financial data, generates forecasts, and recommends budget adjustments



Ledger Agent

Monitors and validate ledger transactions, reconcile and detect exceptions, and generate financial reports



Receivables Agent

Manages end to end tasks including but not limited to invoice handling, collections, cash application, credit risk & reconciliation



Trial Balance Agent

Pulls Trial Balances, detect anomalies and flags issues for accounting review, and generate a trial balance report



Journal Entry Agent

Collects transaction details, create and post entries to detect anomalous journal entries, and general ledger



Reconciliation Agent

Match transactions automatically, identify exceptions, classify differences, resolution actions, monitor reconciliation aging, route tasks and approvals



Fixed Asset Close Agent

Supports depreciation runs, asset additions/transfers/retirements review, and fixed asset reconciliation.

DIGITAL WORKER OVERVIEWS & DEMOS

Why Agents

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erp
suites



Trial Balance Agent

Highlights

- ✔ Automate trial balance preparation
- ✔ Validate trial balance completeness
- ✔ Accelerate the financial close processes
- ✔ Improve audit readiness
- ✔ Reduce manual effort & spreadsheet dependency
- ✔ Continuous visibility into ledger integrity



Reconciliation Agent

Feature Overview

Autonomous

- ✔ Ingest Financial Data
- ✔ Perform Matching on Transactions
- ✔ Detect and Classify Transaction Exceptions
- ✔ Recommendations for Resolving Discrepancies

Semi Autonomous (Human in the Loop)

- ✔ Propose Journal Entries for Review
- ✔ Post Journal Entries with Human Approval
- ✔ Resolve Reconciliations with Human Approval
- ✔ Create Rules for Training Based on Human Feedback



Reconciliation Agent Demo

In this demo you will see how to:

- ✔ Automate reconciliation preparation
- ✔ Identify and explain reconciliation differences
- ✔ Improve accuracy and consistency
- ✔ Observe the status of your agents
- ✔ Provide Audit ready documents
- ✔ Track and audit your past agent actions



MATCH RATE 1 Good

99.3 %

1,648 of 1,660 reconciled txns

AUTO-MATCH RATE 1 Good

93.5 %

Resolved without human touch

DAYS TO RECONCILE -- Warning

2.4 days

Avg close cycle (target ≤ 2.0)

OPEN EXCEPTIONS -- Warning

12 items

Across 3 reconciliation sets

VALUE RECONCILED 1 Good

\$31.7 M

Closing balances - all recs

VARIANCE 1 Good

\$3.1 K

Net unresolved variance

JE AUTOMATION 1 Good

78.4 %

Journals posted without rework

DUPLICATE RATE 1 Good

0.3 %

Detected duplicate postings



ACTIVE RECONCILIATIONS 5 sets - period Apr 2026

RECONCILIATION	TYPE	MATCHED	EXCEPTIONS	VALUE	STATUS	LAST RUN
Cash GL ↔ Bank (1.1110.BEAR)	Bank ↔ GL	26	5	\$1.82M	Review	2026-04-29 20:38

[Reconciliation Agent](#)

Financial Planning & Analysis Agent

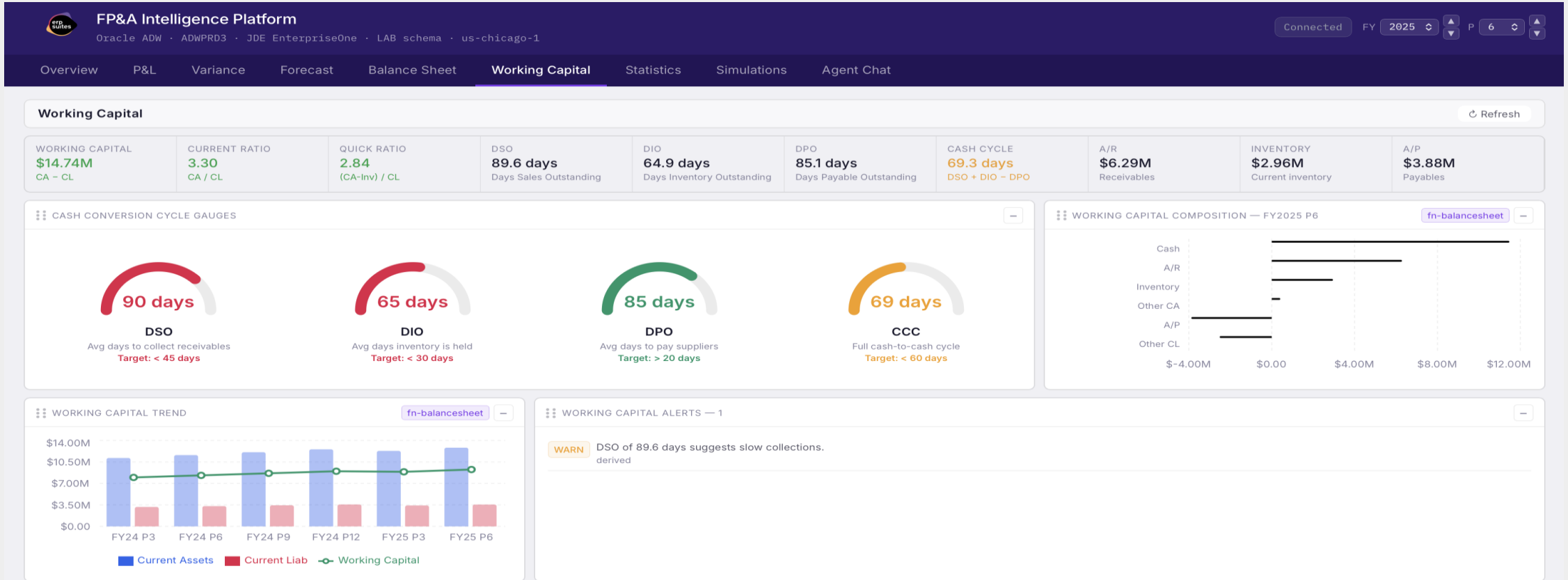
Feature Overview

- ✓ Accelerate planning and forecasting cycles
- ✓ Integrate seamlessly with JD Edwards actuals
- ✓ Scenario-based decision making
- ✓ Provides explainable forecasts and pro formas





Financial Planning & Analysis Agent





Payables Agent Demo

In this demo you will see how to:

- ✔ **Autonomously two-way match an invoice**
- ✔ **Manually upload an invoice**
- ✔ **Observability for the status of your agents**
- ✔ **KPIs to understand the current health of your accounts payable process**
- ✔ **Ability to track and audit your past agent actions**

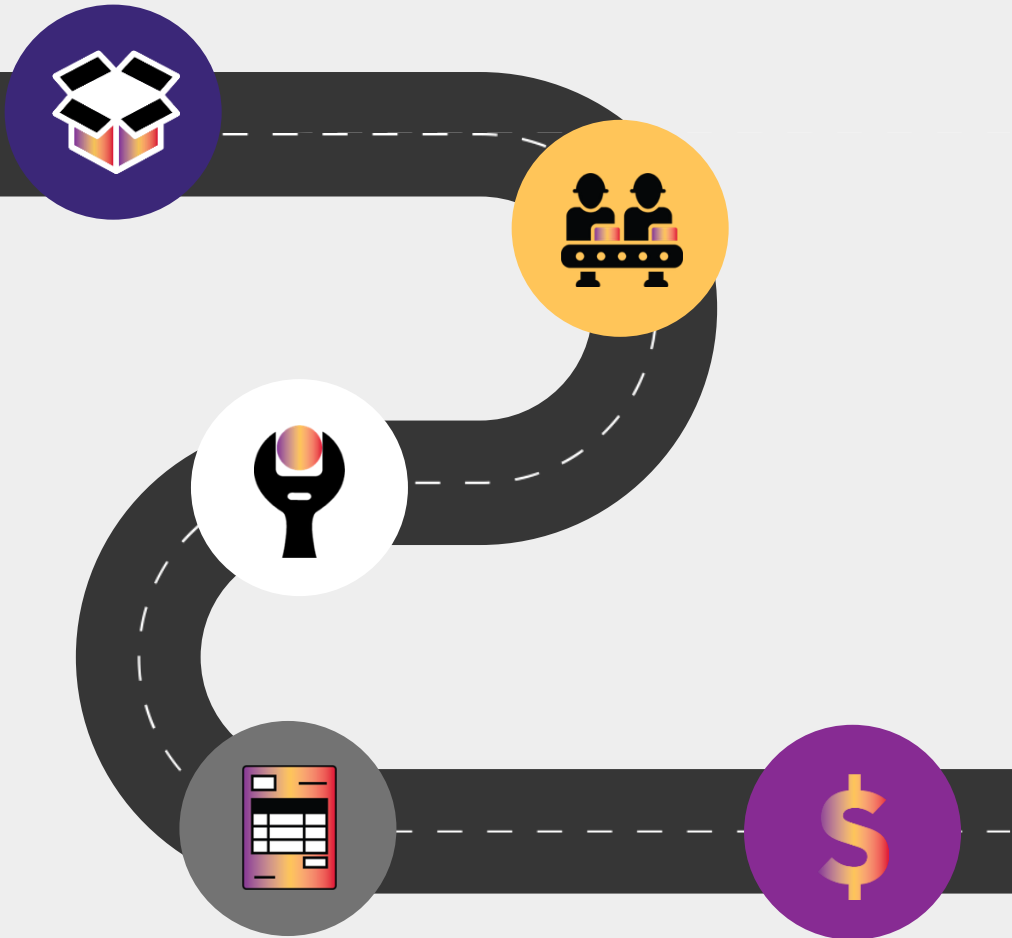


MULTI-ENTERPRISE AGENTS

Highlights

- ✔ Operate across ERP, CRM, Banking, SCM, etc.
- ✔ Cross-department business process understanding
- ✔ Data harmonization – reconciles data models
- ✔ Example 1: Inventory to Cash Agent
- ✔ Example 2: Project Margin Protection Agent
- ✔ Example 3: Customer Promise Agent

Future Roadmap



Inventory Management Agents

- **Backorder Release agent**
- Fulfillment processing agent
- Item shortage analysis agent
- Order Substitution agent



Manufacturing & Supply Chain Agents

- Work order builder agent
- Production schedule optimization agent



Maintenance Agents

- Preventative Maintenance Optimization agent
- Asset Monitoring agent



Procurement Agents

- Procurement Policy agent
- Quote-to-Purchase Requisition agent



Sales Order Agents

- **Sales Order Creation**
- Material Handling Advisor
- PO to Sales Order Converter
- Backorder Management



WHEN DIGITAL WORKERS?

[Why Agents](#)

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[When Agents](#)

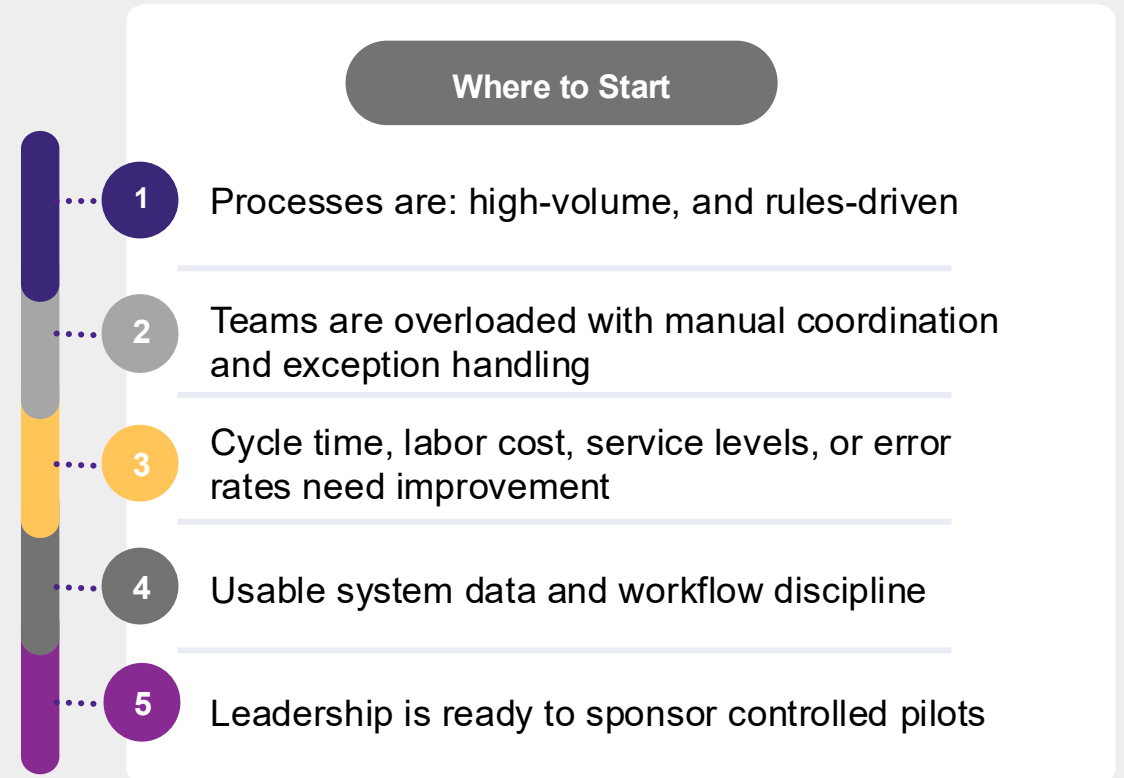
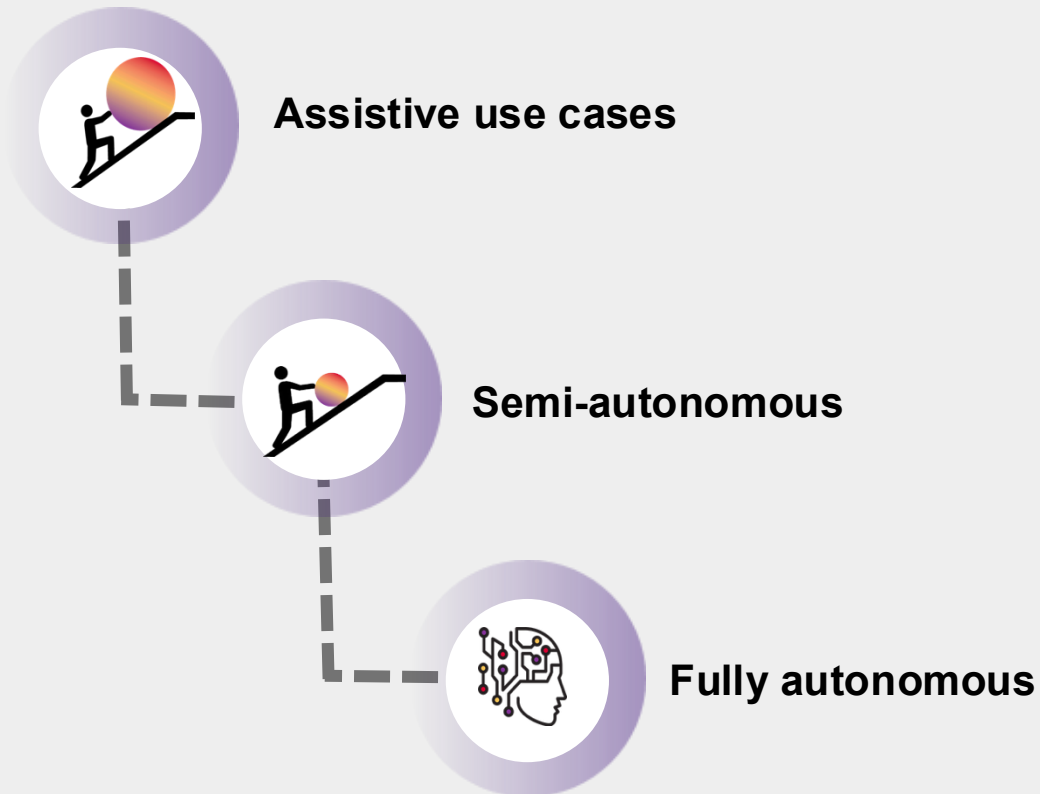
[How Agents](#)

[Q & A](#)



When to Start Adopting Agents?

- ✓ Adopt agents **now** but in a targeted way
- ✓ Start in areas where you have process maturity, people, data access & hygiene, culture, & business pressure



AI Agent Offerings



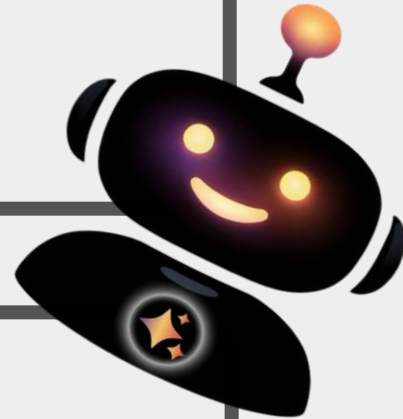
Productized

- Created for Standard JDE Processes
- Requires data integration and security configuration



Consulting

- Created for Custom JDE Processes
- Discovery of current business processes
- Requires data integration and security configuration



AI Assessment Offerings



Targeted

- Focus on specific process or pain point
- Faster to execute
- Lower cost and effort for immediate improvement opportunities



End to End Process

- Evaluates the full end to end process
- Identifies upstream/downstream impacts and cross-functional gaps
- Higher effort but delivers a transformation roadmap





HOW AGENTS?

[Why Agents](#)

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ERP Suites AI Offerings

01

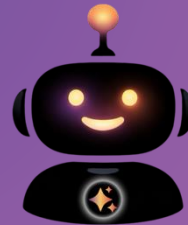
AI Assessment



- Evaluate the full end-end process
- Identifies upstream/downstream impacts and cross-functional gaps
- Prioritized implementation roadmap of high impact use cases

02

DIGITAL WORKERS



- JDE digital agents that execute workflows end to end autonomously
- Leverage JDE orchestrations to complete tasks
- Autonomy that allows for human approval and review

03

Smarter Analytics



- Use Oracle Machine Learning to create models to predict and forecast trends
- Automate the building of insights dashboards with AI LLMs directly in JDE
- Detect Anomalies in your JD Edwards data



QUESTIONS?

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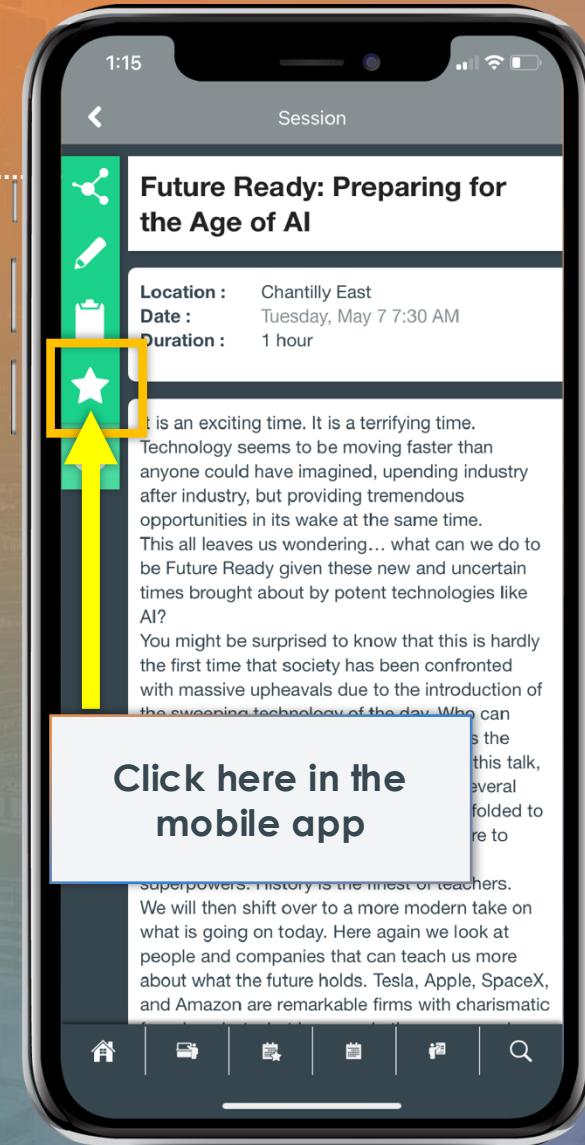
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Speaker:

Manuel Neyra

Presentation ID:

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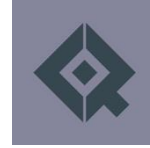
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Save the Date:

September 21 - 23, 2026

Sheraton Downtown Denver | Denver, CO



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