Annexa

Australia and New Zealand's leading NetSuite and AI systems integration partner

Is your data ready for AI?

Check your data readiness

AI can help finance teams work faster, analyse more and automate more. But it can only work with the data underneath it. If your information is duplicated, inconsistent, disconnected or difficult to trace, AI won't automatically fix those problems. It can simply reproduce them faster.

Before you scale AI across finance and operations, run through these checks to see whether the foundations are in place.

Structure

☐ One source of truth	Do you know which system owns your financial, customer, supplier, inventory and operational data? When two systems disagree, is it clear which record wins?
☐ Chart of accounts	Is there one consistent chart of accounts across entities? Are accounts being used consistently, or does consolidation still require mappings and manual adjustments?
☐ Dimensions	Are departments, classes, locations, subsidiaries and other reporting dimensions defined consistently? Would the same transaction be classified the same way by different teams?

Master data

☐ Customer master data	Do you have duplicate customer records? Are naming, addresses, payment terms, currencies and classifications maintained consistently?
☐ Supplier master data	Are supplier records complete and current? Is there a controlled process for creating and changing suppliers? Can you identify duplicates?
☐ Item and product data	Are SKUs, descriptions, categories, units, pricing and inventory attributes standardised across systems and locations?

Connected systems

☐ Multi-entity data	Can you consolidate entities without manipulating spreadsheets first? Are intercompany transactions, currencies and entity structures handled consistently?
☐ Integrations	Do systems exchange data automatically? Do you know which direction each integration runs, how frequently it updates and what happens when it fails?
☐ Manual data movement	Are people exporting CSVs, copying information between systems, maintaining offline spreadsheets or re-keying data?
☐ Reconciliation	How much time does finance spend making systems agree before reporting can begin? Are reconciliations repeatable or dependent on individual knowledge?
☐ Data timeliness	Is the information AI would use live or close to live? Or would it be making recommendations from yesterday's export or last month's spreadsheet?

Governance and control

☐ Data quality ownership	Is someone responsible for each important dataset? Is there an agreed process for correcting errors and preventing them from coming back?
☐ Roles and permissions	Can users only access the data appropriate to their role? Would an AI tool inherit those same restrictions?
☐ Audit trail	Can you see who changed a record, what changed and when? If AI updates something, can that action also be traced?

AI readiness

☐	AI access	Do you know which data an AI tool can read, which records it can update and which actions require approval?
☐	Human approval	Have you decided which AI recommendations can proceed automatically and which need somebody to review them first?
☐	Customisation	Are your custom records, fields and workflows documented well enough for AI to understand the business context behind them?
☐	Use case	Can you name the business process you want to improve, the data it needs and the measurable result you expect?

Annexa

Book an AI and data readiness conversation with Annexa.

We'll look at where your data sits today, how your systems are connected, where the gaps are and whether the right next step is improving what you have or moving to a more scalable cloud ERP such as NetSuite.

Book your session >