

****Plan reference:**** `docs/strategy/EXECUTION\_AND\_MARKETING\_PLAN\_2026\_08\_17.md` §1 Move 10 (D-10).

What this means

FinAdvantage is ****multi-ERP by design**** — the Pipeline Builder accepts uploaded workbooks from any of the major accounting systems, plus any CSV/XLSX export. The agent-runner does not couple to the source ledger; it reads whatever the user gives it.

This is not a "we integrate with everything" claim. It is a **design** claim: our pipeline execution runs against whatever workbook the user uploads, and the per-cell provenance trail records which file each cell came from. The user does not pick an ERP — they pick a workbook.

ERPs we ship against today

ERP	Source pattern	Where it's wired
NetSuite	Saved Search exports (CSV / XLSX)	`frontend/src/app/erp-integrations/page.tsx#netsuite`
QuickBooks Online	Standard Reports exports + the QBO API for live reads	`finadvantage-integration-proxy` service
Xero	Reports exports + the Xero API	`finadvantage-integration-proxy` service
Microsoft Dynamics 365 Business Central	Excel export from the GL	`frontend/src/app/erp-integrations/page.tsx#dynamics`
Sage Intacct	Custom Report Writer exports	`frontend/src/app/erp-integrations/page.tsx#sageintacct`
SAP Business One / S/4HANA	Standard report exports	CSV/XLSX upload, no native integration
Any CSV/XLSX export	The user uploads	Default path

What we explicitly don't claim

- **We are not a system of record.**** The user's ERP is the system of record; FinAdvantage is a consumer. We read; we don't own.
- **We don't sync.**** We don't push back to the user's ERP except through the optional `integrationPost` node type in the Pipeline Builder (per plan §6 B / Move 6, signal ingestion). Most customers don't use that.
- **We don't ship native integrations for every ERP.**** CSV/XLSX upload is the universal path; the listed ERPs have read APIs that we use for live-mode runs.
- **We don't claim to replace a workspace.**** Pennylane does that; we don't. We are the tool the firm uses **inside** the customer's workspace to ship monthly close artifacts with audit-grade traceability.

What this enables

A CPA firm with 50 clients across 8 ERPs can run the same pipeline template against each client without writing per-ERP code. The template lives in ``skill_code_templates`` (per plan §2 E-2); the upload is whatever the client gives the firm. This is the workflow that the partners at regional CPA firms want — see persona 3 ("Partner Priya") in plan §9.

For the engineering team

- The four native integrations (NetSuite, QuickBooks, Xero, Dynamics) are wired through ``finadvantage-integration-proxy-production.up.railway.app`` (a separate Railway service).
- The 12 ERP cards on the home page (``frontend/src/components/EnhancedNav.tsx``) deep-link into ``frontend/src/app/erp-integrations/page.tsx`` — that's the public surface for this claim.
- New ERP integrations are added per the ``integrationFetch`` / ``integrationPost`` node types (per plan §6 D, §10 risk #2).

Provenance

- **Where this came from:** Plan §1 Move 10 (D-10) — "Multi-ERP explicit statement". The 56-company research file (``FinAdvantage_Competitor_Intelligence_Research (1).xlsx``) found that 9 of 56 competitors publish multi-ERP explicit statements; we ship more native integrations than all but 4 of them, and didn't claim it.
- **Where the public callout lives:** ``frontend/src/app/erp-integrations/page.tsx`` (8-line callout block, additive JSX).