Ledger Agent/ Agentic App Prompts:
Practical Tips & Examples

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ORACLE

Contents

Purpose

This note gives you a practical run-time reference to getting started confidently with Ledger Agent / Ledger Agentic App for conversation inquiries and monitoring.

This is a living document and will be regularly updated to reflect new capabilities, recommended prompting practices, and additional examples.

The tips and examples included in this document will apply to anyone using

- Ledger Agentic App in 26C,
- Ledger Agent in 26C, or
- Ledger Agent in 26B with Jul 31st improvements or later.

Practical Tips

Use the following guidance to improve the quality and consistency of Ledger Agent prompts.

Dos

- Start with guided syntax prompts by selecting the Account, Entity and Period before beginning your analysis.
- Always anchor natural language inquiries with Entity, Account and Period.
- Mention dimension names together with values (for example, 'Account 11500' instead of '11500') to reduce ambiguity.
- Be explicit about the measure required, such as Ending Balance, Beginning Balance, or Net Period Activity.

Don'ts

Note: These "Don'ts" are current as of the 26C release and will be revised as capabilities evolve in future releases.

- Don't combine multiple requests into a single long or multi-line prompt.
- Don't use pattern-based inquiries such as 'all accounts starting with 1'.
- Don't compare a balance with another balance such as 'Total Equity < Total Liabilities'
- Don't ask for report submissions or report outputs such as 'Show me the TB and P/L' or 'Run the cash flow statement with these parameters' etc.

Understanding Ledger Agent Defaults and Disambiguation

Ledger Context

- Ledger context is defaulted to the ledger selected in "Ask Oracle" component in last conversation.
- Users can switch to a specific ledger or ledger set context, but multiple ledgers in the same question is ambiguous.
- Tip: Relative ledger phrases should be avoided (for example 'Show balances for corresponding Secondary / Primary Ledgers')

Period Defaults

- Overview page Day number is based on the accounting period of the ledger context.
- If no period is specified in the prompt, Ledger Agent assumes the accounting period corresponding to the current date.
- Tip: In stage environments, specify the accounting period explicitly since stage environments may not have current period data.
- Use relative periods for recurring monitoring prompts to continue using the same monitoring overtime. For example, the prompt 'Account 210110-Trade Liability variance MoM > 10%' will work for June over July when you are in July and will work for July over August when you are in August.

Hierarchy Defaults

- Ledger Agent interprets dimensions using hierarchies for rollups and breakdowns.
- Syntax templates let you specify the hierarchy explicitly.
- For Free-form inquiries :
  - Start by asking 'List my preferred hierarchies'. The hierarchies get listed for each segment with guidance for you to change or clear these preferences through follow-up prompts.
- The agent defaults the hierarchies based on following in this order -
  - user preferences (if present)
  - default hierarchy mentioned against the COA segment (active tree version with start date closest to current date that has the segment value present)
  - any active tree version with start date closest to the current date, and has the segment value present
- Users can change hierarchy during the conversation (hierarchy displayed in the Context) and set new defaults.
- Tip: Select the hierarchy that matches the desired reporting rollup.
- Tip: Always start with List my preferred hierarchies

Response Defaults

Ledger Agent automatically formats responses to provide the most useful information while avoiding unnecessary detail. Understanding these defaults helps you write prompts that produce the results you expect.

- Ledger Agent automatically chooses the most appropriate presentation.
  - A single result is typically presented as a concise response.
  - Multiple rows are presented as a table where key attributes from the prompt appear as the headline with rest of the results presented in the table.
  - Large result sets are displayed on screen for up to first 25 rows with an option to Export in Excel.

    - Tip: Users can use 'Export to Excel' as a natural language prompt to get any tabular response exported in excel (available in Recent Activity panel)
- Measures included in the response -
    - The headline typically includes the most suitable measure such as ending balance for Balance sheet accounts and period activity for P/L accounts.
    - The table for multiple rows includes all measures (Beginning balance, period activity, Ending Balance) unless specified otherwise.
    - You can specify these in your prompts or ask for specific measures to be added as follow-ups such as 'Include Beginning Balance / Opening balance'.
- Context explains how the request was interpreted.
- Typical context includes:
    - Ledger
    - Accounting Period
    - Company / Entity
    - Account
    - Hierarchy (when applicable)
    - Journal Source (when applicable)
    - Currency (when applicable)
    - Threshold basis (in cases where amount conditions were specified)

- Tip: Always check the context to know the exact attributes considered for your request. If the context isn't what you intended, adjust your prompt.

Currency defaults

- When currency is not specified:
    - Balance inquiries default to the ledger currency (accounted currency).
    - Variance calculations also use accounted currency by default.
    - Specify a currency only when you want analysis in entered currency, for example 'Show EUR balances for Account 740240 in entity 3200 in Jul-26' will show the entered currency balances where entered currency was EUR for the given entity and account.

Examples

Note: These examples are current as of the 26C release and will be revised as Ledger Agent capabilities evolve in future releases.

1: Account analysis – slice and dice by dimensions & levels

Prompts	Narrative
• Show balances for company 1111 and Account 50000 for the period Mar-26 • Breakdown by Account • Breakdown by cost center	Intent: Understand the cost of sales for an entity –get a good view of the cost distribution and roll up across dimensions. Approach: I start by asking for the account balance 50000 - Total Cost of Sales in entity 1111 - Vision Chardonnay I specify the account, entity, and period. I use segment names along with values for clarity instead of descriptions Next I ask for the cost roll up by breaking down the total cost into cost heads. Finally I view the distribution of the detailed cost heads across different cost centers. I can now see a good view of how the total cost of sales is spread across the business and can use this information to correlate with sales or with other operating expenses to get business indications.
Show Travel balance for Vision Foods USA	Intent: Inquire on the current period balance of Total Travel expenses I use the commonly used words to ask the agent in free-form inquiry. The Agent is **unable to service the request and asks for rephrasing** since multiple accounts use the word Travel. This is not an error; I rephrase the prompt to provide dimension names and values for clarity – **Show balance for account 53000 for company 3000** and get the desired result Using dimension names and specific values gives the balance I requested.

Suggested Syntaxes: Show balance for Account <*Account*> for Entity <*Entity*> for Period <*Period*>

2: Account and Journal Activity analysis

Prompts	Narrative
• Show balance of account EXP for Company 3000 in period Jun-26 • Breakdown by Account for 53410-Internet Expenses • Include Cost Center and Product • Breakdown by Journal Source • Show journal details for the Manual Journals	Intent: Investigate Total Internet Expenses to find any significant movements, trace the movements to the source ensure they are valid Approach: I start by asking for Expenses total (EXP -Total Expenses) in an entity (3000- Vision Foods USA) and period.

• Include approval status and approver	I get a view of the rollup of total expenses and seek further breakdown on one of the largest amounts (Internet Expenses) I include more dimensions to understand the distribution of Internet expenses by Cost Center and Product. Next, I ask for the source of these expenses by journal source to see if there was a significant number from a single source. A significant amount sits under manual journal for this expense where typically the expense should have come from a supplier invoice (Payables) I ask for the details of the manual journals towards Internet Expenses and as a follow-up ask for the approval status and approver to be included for reference. In the end I have the information I need to justify the significant movement.
• What is the account 10000 balance for Company 3111in period May-26 in entered currency for each currency • Breakdown by journal source for the EUR entered currency balance • Show journal details for the manual journal source with journal total exceeding 1000 EUR	Intent: Investigate the composition of the 10000 - Total Cash balance and different currency mix and ensure these are supported by valid transactions. Approach: I request the Total Cash balance for the company Vision Foods Marketing (US) and period. By specifying 'entered currency' I clarify my intention to understand natural currency movements. The largest balance being in EUR after USD that is the home currency, I request a breakdown by Journal Source for EUR balances. And then review any manual journal activity in EUR above a threshold. I ask for journal descriptions, amounts, and accounting details, to review whether the entries represent legitimate business events.

3: Account Analysis into Payables

Prompts	Narrative
• Show EXP balance for Company 3111- Vision Foods Marketing (US) in period May-26 • Breakdown by Supplier for 52385 – Professional Services • Show Payables transactions contributing to the balance for Supplier Hilton Hotel, Include Invoice Number, Amount and Approval Status	Intent: Investigate the top expenses and which suppliers or transactions are driving it. Approach: I begin by requesting the total expense (EXP- Total Expenses) balance for the period to understand the top contributors. Apart from usual suspects the 52385 – Professional Services stands out as significant balance.

	I ask the agent to get the breakup of that specific expense by Supplier directly. This helps determine whether the balance is concentrated with a few suppliers or spread across many vendors. I chase the supplier with the largest contribution and get invoice details next. Specifying the elements of the invoice helps the agent bring me the right details in one go. By reviewing these transactions, I can identify large invoices, unusual charges, etc, where additional review may be required. Currently accounted transactions are surfaced.
• Show balance of account 52385 for Company Vision Foods USA in period Jun-26 • Breakdown by Supplier • Show Payables invoices for Supplier 'CM Consulting'. • Show payment status and payment terms for these invoice • Summarize open liability exposure by Supplier	<u>Intent</u>: Investigate open liability against a particular expense – anchored around key suppliers. <u>Approach:</u> - Get a balance view of the 52385 – Professional Services in the ledger - Supplier distribution to get the key suppliers - Review supplier invoices with a view of payments made or pending to get an open liabilities position
• Compare period activity for Intercompany Receivables account in entity 3211 for JAN-26 and FEB-26	<u>Intent:</u> Understand if the Intercompany sales and services are increasing overtime. The agent responds with - No results found for your criteria. Try adjusting account, ledger, period, or other filters. This means there were no balances found for the selected criteria. I validate this through a Trial balance report or the existing Inquire and analyze balances UI and find that indeed there has not been a balance in this account for the last 3 months.

4: Account Analysis into Receivables

Prompts	Narrative
• Compare balance for account 13005 for Company 3000 between quarters Q1-2026 and Q2-2026 • Breakdown the variance by Location and Product • For the location 1311-Brazil , breakdown receivables by Customer in the current quarter	<u>Intent</u>: Understand the drivers behind the quarter-over-quarter movement in Accounts Receivable by tracing outstanding balances by location and product through customer-level exposure and supporting sales transactions. <u>Approach:</u> - Get a balance view of the receivables in the ledger - Understand distribution by different dimensions

• Show top sales invoices for the largest contributing customer. Include Sales Invoice Number, Invoice Date, Invoice Amount, Product and Customer.	- Review customer transactions / sales invoices for the top variance
• For period May-26 show period activity for 3111, account 13074- Unapplied Receipts • Show customer receipts for that activity. • Show the accounting distribution for the receipts. • Show the customer and receipt status.	Intent: Investigate the activity in the Unapplied Receipts account and identify directly the customer payments that have been received but not yet applied to customer invoices, and determine whether the balances represent timing differences, cash application issues, or transactions requiring follow-up. Approach: - Get a view of the balance in the ledger. - Directly ask for customer receipts when I know this account is used by Customer Receipt transactions from Receivables. - Ask for transaction details and accounting. - As a follow-up I can get to customer invoices related to these receipts to get a full picture

5: Journals Inquiry

Prompts	Narrative
• Show unposted journal activity for 24990-Other Payables and company 3111-Vision Foods Marketing (US), by source for period Dec-25 • Show journal details • Include posted by	Intent: Track unposted activity for reconciliation and completeness Approach: • Get to the unposted activity view on this account • For sources like Payables, use this to reconcile the ledger balance against subledger for this account as this will be one of the differences. • For completeness, follow-up on posting / exception resolution if any.
• Show posted journals for account 24990-Other Payables and company 3111-Vision Foods Marketing (US) •	Intent: Track recent posted activity I ask the agent for posted journals in the current period however for Other Payables account. The agent responds with **results will appear in Recent Activity when ready.** Since this is not an error and there can be a large number of posted journals for the requested criteria I wait for the results to appear on the Recent Activity panel on the overview page. I continue with Ledger Agent interaction through another inquiry while the earlier request is processing in the background.
• Show journals for Payables source and Purchase Invoices category with an accounted amount > 10000 USD	Intent: Ad hoc check on high value invoices. The amount may represent a sum of multiple invoices

6: Monitoring Prompts

Prompts	Narrative
MoM variance for account 52330 company 3211 > 20% Frequency: Daily Timespan: 9AM PST	Monitor if the balance for account 52330-Advertising for Company 3211-Vision Foods Growing -US exceeds 20% of what it was last month. Approach: - use relative period language like MoM, current period, prior period such that the prompts do not need to be defined again and remain active as per the frequency and timespan. - Use specific period names in the prompt for a one-off point in time inquiry – best suited as a free form inquiry
Account 60042 balance >0 for company 3211 Frequency: Daily Timespan: 5AM	Monitor if there is any balance is Suspense account for Company 3211-Vision Foods Growing -US
Net accounted activity > 0 in accounts 11051, 11052, 11053 for journal source 'Payables' Frequency: Weekly Timespan: every Monday 9AM PST	Accounts that are Lease assets accounts should not appear on Payables transactions.
Unapproved manual journals > $5000 USD Frequency: Daily Timespan: D-5 to D+1	Control to review journals that are of significant amount and remained unapproved
Monitor unposted journals with accounting date in the last 7 days Frequency: Daily Timespan: 8AM PST	Monitor unposted journals from the last seven days so that delayed posting is identified promptly. Approach: Use a relative date range for a recurring control, then schedule it at the frequency and time that fits the close process.
Monitor journals pending approval with accounting dates from 1 May 2026 through 31 May 2026 Frequency: Daily Timespan: 8AM PST	Review a defined accounting-date window for journals that still require approval. Approach: Use explicit start and end dates when the control is for a fixed period, such as a month-end review or remediation window.

7: Variations of Account Analysis by Account Type and Top/Bottom indicators

These examples explore prompt variations for account analysis that uses criteria much broader than traditional inquiry parameters.

Prompts	Narrative
List expenses with activity over 10K in Jun-26	Intent: Identify expense accounts with material activity without first specifying an individual account. Note that the agent can service inquiries without anchoring on an Entity however your dataset should be kept in mind before inquiring too broadly

Show revenue accounts with negative balance in previous period	Intent: Find revenue-account exceptions that may require investigation. Approach: Combine an account type, balance condition, and period to identify unusual balances for review.
Top 5 expenses per company for Jun-26	Intent: Compare each company's largest expense drivers for the selected period. Approach: Use a Top-N request with a per-company grouping to rank the leading expenses within each company.
Show bottom 10 products by revenue	Intent: Identify products with the lowest revenue contribution. Approach: Use a Bottom-N request to focus follow-up analysis on the lowest-ranked products.
Show me all assets with a non-functional currency balance greater than $50,000	Intent: Identify material asset balances held in non-functional currencies. Approach: Combine the Asset account type, an entered-currency condition, and a threshold to focus review on material exposures.
Compare period activity for account 17920 > 10% for Apr-26 and Mar-26	Intent: Identify a material month-over-month movement for a specific account. Note: Now the agent can support variances through natural language prompts Approach: State the account, two accounting periods, and variance threshold so the comparison is explicit.
Show Assets and Liabilities account in current quarter Include equity accounts	Intent: Review the balance-sheet account types for the current quarter, then extend the view to equity. Note: Since the period activity or ending balance is not specified, the ending balance being most commonly asked measure for balance sheet accounts will be picked up by the agent. This can then be modified to include period activity Approach: Start with the required account types and use a follow-up to include an additional account type without restating the period.
Top 3 departments by operating expense	Intent: Identify the departments with the greatest operating expense. Approach: Use a Top-N ranking with the department dimension and operating-expense measure.
Show the top 3 companies by expense activity for the previous quarter	Intent: Rank companies by expense activity for a relative quarter. Note: Expense activity is interpreted as period activity for all accounts with account type as 'Expense' Approach:

	Combine a Top-N request, company grouping, expense activity, and a relative period.
Show the top 10 asset accounts for Jun-26 Compare them with May-26	Intent: Compare the leading asset accounts across two specified periods. Approach: Start with a ranked view for Jun-26, then add May-26 in a follow-up to compare the same set of accounts.
Show the top 10 expense accounts for the current month Show the previous month instead Group them by company	Intent: Refine a ranked expense analysis from the current month to the previous month, then view it by company or any other business parameter represented as a segment in your Chart of Accounts Approach: Use follow-ups to change the period and add grouping while retaining the Top-N, account type, and ranking measure.

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