Cloud Peach AI

PostWise

One ledger. Every operation.

ERP for Canadian businesses: finance and operations in one system, with AI that prepares the work and leaves the posting to you.



PRODUCT BROCHURE

Cloud Peach AI · Mississauga, Ontario

Run the whole business on one set of books

One system, not five

PostWise starts where most business software stops: the ledger. Every module, from a sales invoice to a technician's van stock to a pay run, posts double-entry journals to the same general ledger, so the books are current the moment the work is done.

No exports between systems, no re-keying, no month-end catch-up. Start with Accounting and switch on Sales and Services, Supply Chain, Human Resources and Field Service as the business needs them.

AI that prepares, people who decide

PostWise reads bank statements and supplier bills, with OCR built in for scans and phone photos, codes transactions and drafts entries from a typed request. It never posts on its own: every AI-prepared entry waits for a person to review it and choose Post, Approve or Send.

AI is off until you switch it on. You choose the provider, use your own key, and decide which clients and workflows it can touch.

The AI prepares. You post.

The rule behind every AI feature in PostWise.

Who it's for

Service and trades businesses
Requests, dispatch, technicians in the field and billing from the job.

Distributors and product sellers
Purchasing, stock by location, serials and lots, shipping.

Professional services
Estimates, projects with time tracking, invoicing and CRM.

Growing teams with payroll
Leave, timesheets and Canadian payroll that posts itself to the books.

Groups with many companies
Every company in one login, each kept separate and secure.

One platform. Five modules. One ledger.

Each module is switched on per company, so you start with what you need today and add the rest as you grow. Sales and Services, Supply Chain, Human Resources and Field Service all post to the same Accounting ledger, which keeps every report in step with the work.

CORE
Accounting

The double-entry ledger at the centre, with banking, payables and the month-end close.

Ledger · bank statements · supplier bills · reconciliation · fixed assets · budgets · dividends · multi-currency

MODULE
Sales and Services

Quote, sell and get paid, with a CRM that keeps the pipeline next to the invoices.

Estimates · invoices · credit notes · sales orders · projects and time · leads and opportunities

MODULE
Supply Chain

Buy, receive, store and ship, with stock valued in the ledger as it moves.

Requisitions · RFQs · purchase orders · locations and bins · serials and lots · shipments

MODULE
Human Resources

People, time and Canadian payroll, with every pay run posted to the books.

Employees · leave · timesheets · pay runs · remittances · T4 and RL-1 · recruitment and reviews

INDUSTRY MODULE
Field Service

From the service request to the technician's visit to the invoice, on one record.

SLAs · dispatch board with day planner · My Day phone screen · contracts · preventive maintenance · customer portal

ACROSS ALL MODULES
Reports and filings

Financial statements in Accounts or GIFI view, a custom report builder, and Canadian returns and T2 working papers prepared from the ledger.

P&L · balance sheet · cash flow · GST/HST · payroll returns · T4, T4A and T5 slips · T2 working papers and CCA

NEW · SCHEDULED TASKS After hours, PostWise prepares the next pay run, stock top-ups, reorders, cycle counts, month-end entries, bills due and the quarter's sales tax return as drafts for review. A scheduled task never posts or pays.

One system. Built around you.

Most businesses run on a patchwork: one app for the books, another for jobs, a spreadsheet for stock and a payroll service on the side. PostWise brings it all into a single system, and our team shapes it to the way you work.

Need a screen, report, workflow or connection that isn't there yet? Tell us. We build it, test it and deploy it to your PostWise.

Days, not months.

Custom functionality goes live in days, without a long upgrade project.

One single system

Finance, sales, purchasing, stock, field service, HR and payroll on one database and one ledger. No exports, no duplicate entry, one version of the truth.

Scalable

Start with one company and one module. Add modules, companies, users and locations on the same platform as you grow, with nothing to migrate.

Custom functionality

New screens, reports, approval steps or AI Chat workflows, built for how your business runs and deployed in days, not months.

Integrates with any system

We connect PostWise to the systems you already use. Built in today: QuickBooks Online, Microsoft, Google, Stripe, EasyPost, Twilio and Bank of Canada rates.

OCR built into the process

Scanned statements, PDF bills and phone photos of invoices are read automatically in the normal flow. No separate scanning tool, no retyping.

Cloud or on-premises

Host it in the cloud, with files and backups kept in Canada, or on your own servers on-premises. Same system, same features, either way.

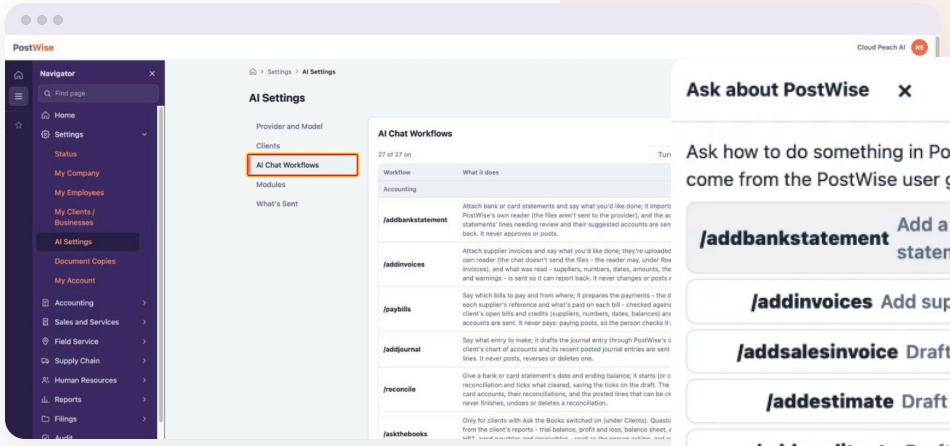
AI that does the prep work

Type a slash command in Help chat and attach the paperwork, such as a bank statement, a stack of supplier bills or a note about a service call. PostWise fills in the real entry screen, codes it and shows it to you. It stops before the final step every time, so posting, approving and sending stay with a person.

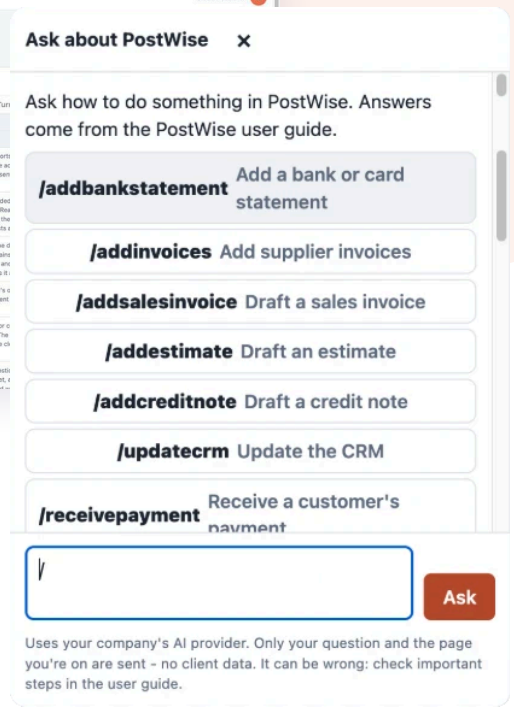
`/addbankstatement` `/addinvoices` `/reconcile` `/addsalesinvoice` `/paybills` `/addservicerequest` `/askthebooks`

What you can expect

- **Off by default:** switch AI on per company, per client and per workflow.
- **Your provider, your key:** Anthropic, OpenAI, Google Gemini, Mistral, Groq, DeepSeek, xAI, Together AI or OpenRouter.
- **Or keep it in-house:** Local AI runs on a private model server we set up for you. No API key, and nothing goes to an AI company.
- **You see what's sent:** a What's Sent page shows exactly what goes to the provider.
- **Ask, don't touch:** three read-only workflows answer questions about your books, stock and payroll.



AI Settings: every AI Chat workflow has its own switch



Help chat: type / to pick a workflow

27
AI Chat workflows across every module

9
AI providers on your own key, plus optional Local AI

0
entries posted, approved or sent by AI alone

One set of books. Connected to everything.

Everyone works from the same data: the office in the browser, technicians on a phone screen, customers through links and a portal. Every module writes to one general ledger, and the Canadian tax and payroll rules sit between them, so the numbers are right where they're made.

- **One ledger for every module**
- **Canadian rules built in**
- **AI that stops before posting**
- **Each company's data walled off**

WHO USES IT	Office team in the browser · Technicians on the My Day screen · Customers via estimate links and the portal
HELP CHAT	27 AI Chat workflows · Ask the books, stock and payroll · Help answers from the user guide
MODULES	Accounting · Sales and Services · Supply Chain · Human Resources · Field Service
CANADIAN RULES	GST/HST, QST and PST · payroll for every province and territory · T4, RL-1 and ROE · GIFI and CCA
LEDGER	**One double-entry general ledger · period locks · year-end close · audit log of every change**
DATA AND SECURITY	Row-level security per company · Encrypted files stored in Canada · Two-factor and Microsoft/Google sign-in · Roles by module and by client
CONNECTS TO	QuickBooks Online import · Google Drive and OneDrive · Stripe card payments · EasyPost shipping · Twilio SMS · Bank of Canada exchange rates · 9 AI providers · custom integrations to any system

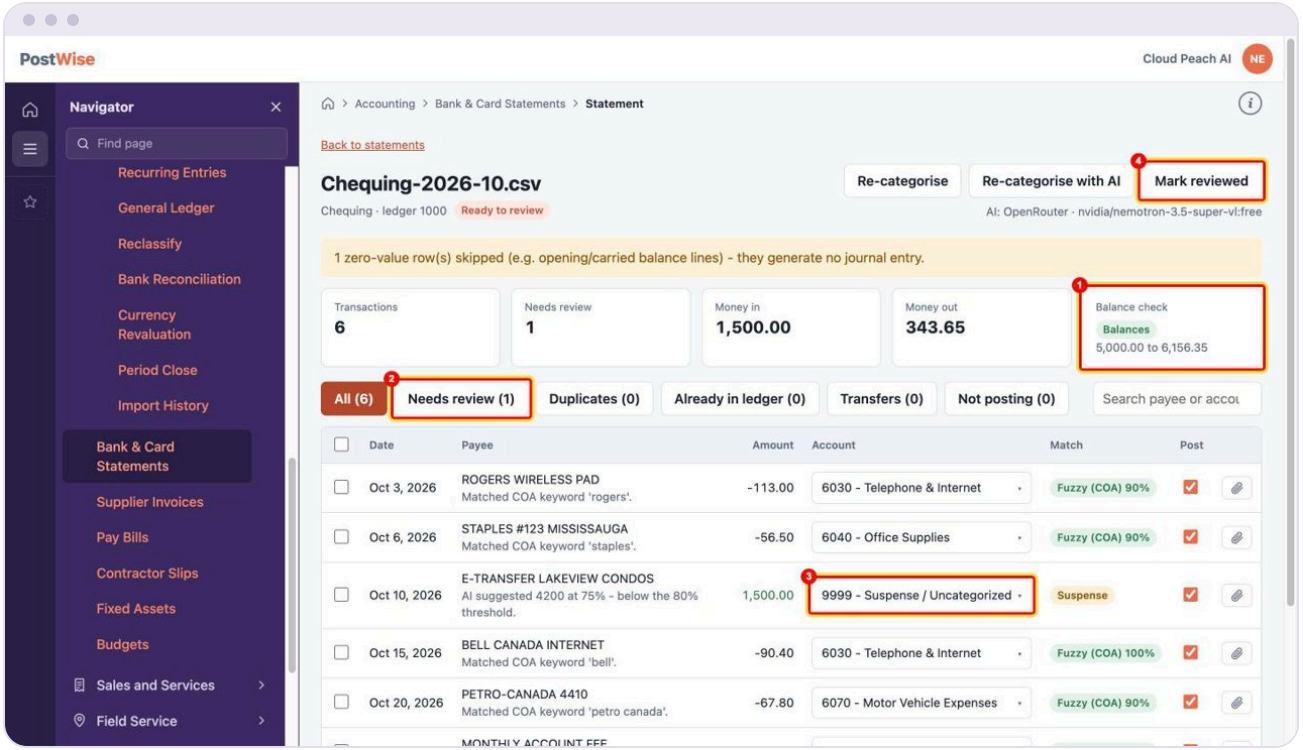
From bank statement to closed month

Banking and payables

- Reads CSV, Excel and PDF statements, with built-in OCR for scanned pages, up to 24 at once
- Reads supplier bills from PDFs or phone photos by OCR, 50 at a time, and checks the totals
- Catches duplicates, lines already in the ledger, and transfers between your own accounts
- Learns a rule from every correction, so next month needs fewer

Ledger and close

- Draft and posted journals; posted entries are reversed, never edited
- Recurring entries, reconciliation, period locks and year-end close
- Fixed assets, budgets, cost centres and Bank of Canada exchange rates



Statement review: each line coded and matched, and the balance check passed

Your saved rules -> Smart matching -> Optional AI -> You review and post

24
bank statements in one upload

50
supplier bills read in one go

1
ledger, shared by every module

Service calls, stock and vans on the same books

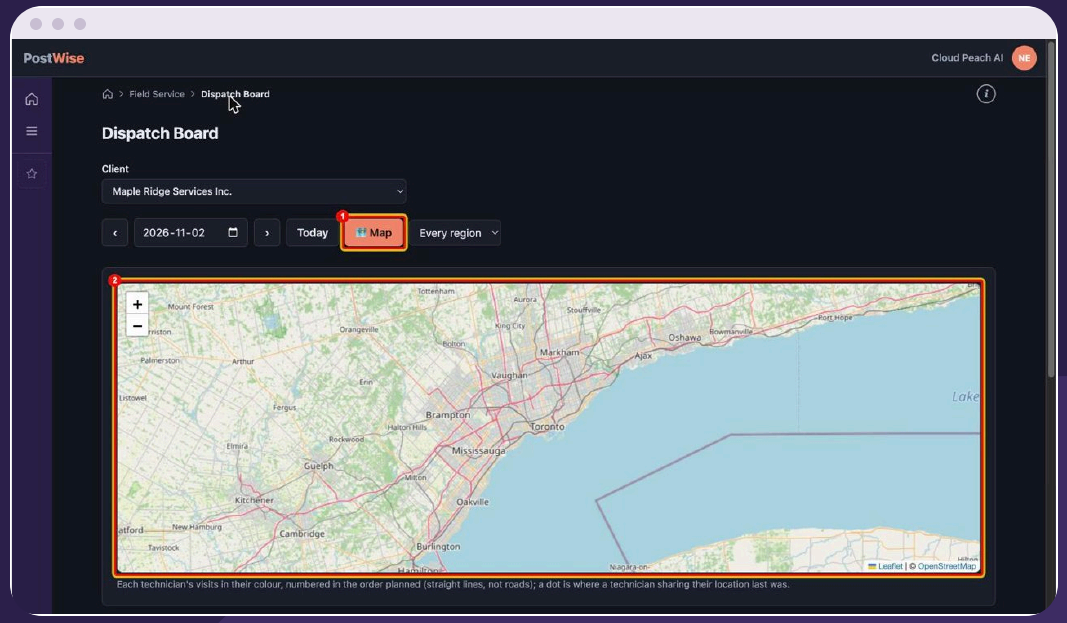
Field Service and Supply Chain share parts, locations and costs with the ledger. A part used on a job comes off the van's stock, goes on the invoice and lands in cost of sales without anyone keying it twice.

Field Service

- Service requests with SLAs on business-hours calendars and customer time windows
- Dispatch board that ranks technicians by skill, region and road distance
- Suggest plan: the whole day planned around skills, time windows, SLAs and drive time, applied in one click
- My Day phone screen with customer signature and part requests
- Contracts, preventive maintenance, warranties and rentals
- Customer portal, QR asset labels and satisfaction surveys
- Debrief to invoice; card payments through your own Stripe

Supply Chain

- Weighted-average or standard cost, chosen per part
- Locations and bins, including technicians' vans
- Serial numbers, lots and expiry dates, with lot recall
- Requisition approvals, RFQs, POs and receiving
- Landed costs, kits and assemblies, cycle counts
- Shipping labels and rates through EasyPost



Dispatch board, map view: the day's visits for each technician

18

supply chain reports, from ABC analysis to supplier performance

12

field service reports, from SLA performance to first-time fix

Made for Canadian rules, coast to coast

Sales tax, payroll and year-end are built in for every province and territory, with dated rate tables, so a mid-year change applies from the right day. PostWise prepares the figures, slips, files and T2 working papers; you review them and file with the CRA or Revenu Québec.

Sales tax

- GST/HST returns, regular or Quick Method
- QST return for Quebec
- PST for BC, Saskatchewan and Manitoba
- Purchase tax split into recoverable and cost

Payroll and slips

- CPP/CPP2, QPP, EI, QPIP and income tax
- Remittance tracking for CRA and Revenu Québec
- T4 and RL-1 slips and summaries
- ROE data ready for ROE Web
- T4A and T5018 slips with CRA XML
- T5 slips for dividends and interest, with CRA XML

Year-end and T2

- Schedules 100 and 125 in GIFI codes; Accounts or GIFI view of the P&L and balance sheet
- T2 working papers: Schedule 1, taxable income and a Part I tax estimate
- Schedules 3, 50 and 141, from dividends in the books
- Schedule 8 CCA working paper
- GIFI file for TaxCycle and similar



13

provinces and territories, for both payroll and sales tax

CAD

books, with foreign currency on Bank of Canada daily rates

Working papers, not the return. PostWise works out most of what goes into the T2 so it can be checked line by line, and flags what needs a look. The return itself is filed with CRA-certified software.

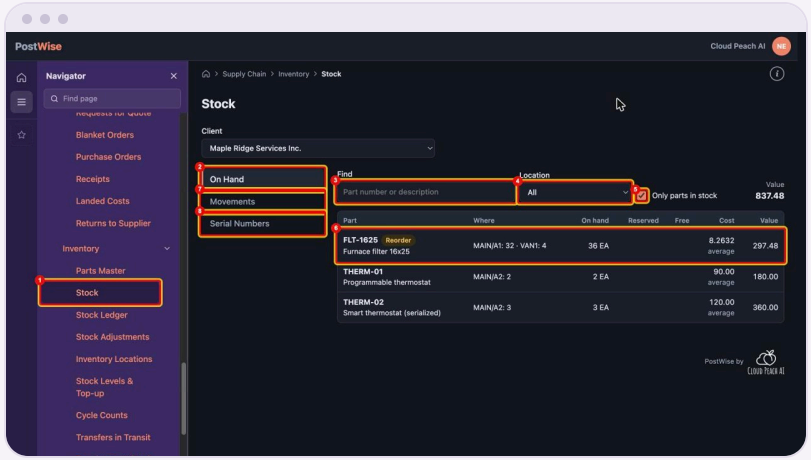
See it at work

Nothing to install

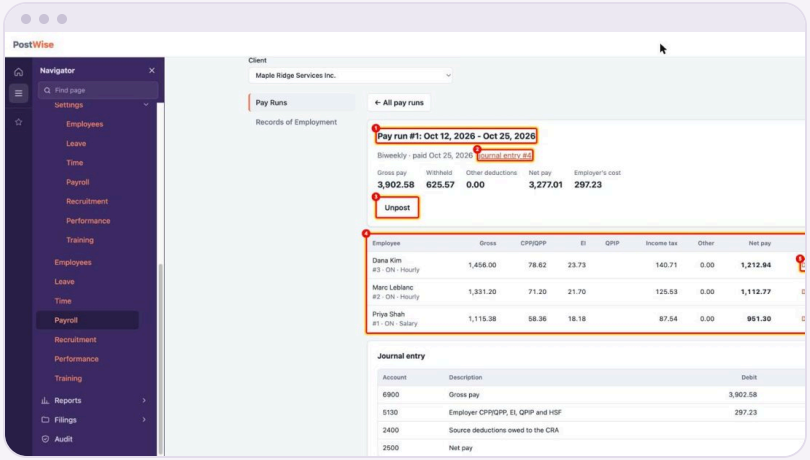
PostWise runs in the browser for the office, and gives technicians a phone-sized My Day screen for their visits, signatures and part requests.

The same screen, every time

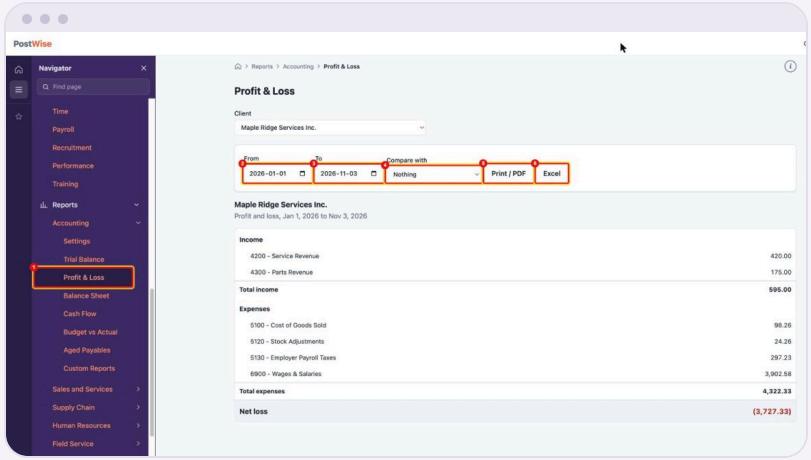
Each page's help topic is one click away, and every report exports to Excel or prints to PDF. AI Chat workflows fill in these same screens, so what the AI prepares looks exactly like what you would have typed.



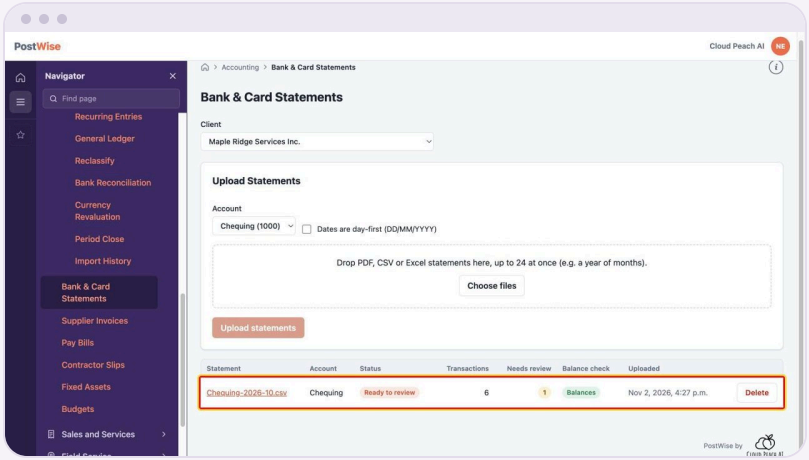
Stock on hand by part and location



A pay run, with the journal entry it posts



Profit and loss, ready for Excel or PDF



Drop in statements: PDF, CSV or Excel

The functionality you need, in one place

Everything below is in PostWise today. Switch on the modules you need now, and add the rest as the business grows, on the same ledger and the same data.

Accounting

- Chart of accounts
- **GIFI codes**
- Journal entries
- Recurring entries
- General ledger
- Reclassify
- Bank reconciliation
- Period and year-end close
- Fixed assets
- Budgets
- Cost centres
- Currency revaluation
- **Dividend declarations**
- Audit log

Banking and AP

- Bank and card statements
- OCR for scans and photos
- Bank rules
- Supplier invoices
- Supplier credits
- Pay bills
- Contractor slips
- QuickBooks history import

Sales and CRM

- Customers
- Products and services
- Estimates
- Sales invoices
- Recurring invoices
- Credit notes
- Receive payment
- Sales orders
- Projects and time
- Leads and opportunities
- Contacts and follow-ups

Supply chain

- Parts master
- Supplier price lists
- Requisitions
- Requests for quote
- Blanket orders
- Purchase orders
- Receipts and inspection
- Landed costs
- Serials and lots
- Cycle counts
- Transfers and consignment
- Shipments and returns

Field service

- Requests and SLAs
- Work tasks
- Dispatch board
- **Day planner**
- **Customer time windows**
- My Day
- Part requests
- Checklists and templates
- Service contracts
- Preventive maintenance
- Warranties
- Rentals
- Customer portal
- Billing

HR and payroll

- Employees
- Leave and holidays
- Timesheets and overtime
- Pay runs
- Remittances
- T4 and RL-1
- Records of employment
- Recruitment
- Performance and goals
- Training

Reports and filings

- Trial balance
- Profit and loss
- Balance sheet
- **Accounts or GIFI view**
- Cash flow
- Aged AR and AP
- Custom reports
- 30 operations reports
- GST/HST, QST, PST
- **T2 working papers**
- T2 CCA
- **T5 slips**

Platform

- Many companies, one login
- Roles and permissions
- Two-factor sign-in
- Microsoft and Google sign-in
- Encrypted attachments
- Drive and OneDrive copies
- Help chat
- AI Chat workflows
- **Local AI**
- **Scheduled tasks**
- Custom features
- Custom integrations

About Cloud Peach AI

Cloud Peach AI is an AI consulting and automation firm in Mississauga, Ontario. PostWise is our own product: an ERP for businesses that want their finances and operations in one system, built, extended and supported by our own team.

We build AI that does the preparation, shows its work, and leaves every decision that matters to a person. When you need something new, we build it and deploy it in days, not months.

Secure by design

- Each company's data kept apart by database row-level security
- Roles with none, view or edit access per module and per client
- Two-factor sign-in; Microsoft and Google sign-in
- Attachments encrypted (AES-256-GCM) and stored in Canada
- An audit log of every change that can't be edited

Easy to move in

- Import your QuickBooks Online history and attachments
- Bring in customers, suppliers and bank rules from CSV
- Start with Accounting; switch on other modules when ready
- Optional copies of documents to Google Drive or OneDrive

See PostWise on your own books.

info@cloudpeachai.com cloudpeachai.com

© 2026 Cloud Peach AI, Mississauga, Ontario. PostWise is a product of Cloud Peach AI. Features described are in the product as of November 2026. Screens show a test company.