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The Finance Leader's Guide to Claude MCP

What MCP is, how it works, and how you can apply it in your day-to-day workflows.

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What Is MCP and Why Finance Leaders Should Care

There's a new layer to AI that most finance teams haven't tapped yet. It's called MCP, Model Context Protocol, and it has dramatically changed what's possible when you use tools like Claude.

If you've been using Claude to write variance narratives, clean up spreadsheets, or summarize board decks, that's a great start. But you've been working with one hand tied behind your back. Claude, in its default state, can only reason about information you paste into it. MCP removes that constraint.

With MCP, Claude can connect directly to your live systems — your ERP, your billing platform, your bank accounts — and take action on your behalf. You stop copying and pasting data into an AI. The AI comes to the data.

Where MCP Came From

MCP was introduced by Anthropic in November 2024 as an open protocol for connecting AI models to external data sources and tools. The idea was straightforward: give AI a standardized way to talk to the systems people actually use at work, rather than requiring every company to build custom integrations from scratch.

Think of it like USB-C for AI. Before USB-C, every device had its own connector. MCP is the standard connector that lets Claude plug into your tools and do real work inside them.

Why It Took So Long to Take Off

MCP launched quietly, and the early adopters were mostly developers and technical teams. For most finance leaders, it remained invisible for a few reasons:

The setup required a developer. Early MCP implementations needed command-line configuration and technical know-how to get running. Finance teams weren't going to set that up themselves.

The tools that supported it were niche. In the first few months, MCP-compatible servers were sparse. Your ERP probably didn't have one.

The use cases weren't obvious yet. Even technically savvy finance leaders weren't sure what to do with it. "Claude can connect to my ERP" is abstract. "Claude can pull my ARR waterfall and draft an investor update in 30 seconds" is concrete.

That's changed. By early 2025, dozens of enterprise software companies had built MCP servers and the use cases for finance teams became impossible to ignore. Tools like Claude's desktop app made it possible to connect servers without writing a single line of code.

> "The infrastructure for AI in finance has caught up to the ambition. MCP is the moment where it stops being a demo and starts being how work actually gets done."
>
> — Nicolas Kopp, CEO, Rillet

What MCP Actually Lets You Do

At its core, MCP gives Claude the ability to:

Read from your systems: Pull live data from your ERP, billing platform, banking feeds, or any MCP-enabled source. No exports, no copy-paste.

Write to your systems: Create journal entries, update contracts, log payments, and generate invoices directly from a conversation.

Reason across multiple sources at once: Ask Claude a question that requires pulling from your GL, your Stripe data, and your payroll system simultaneously, and get a synthesized answer.

For finance teams, this unlocks an entirely new category of workflow: natural language operations. Instead of navigating menus and building reports manually, you describe what you need and Claude handles the retrieval, analysis, and in some cases, the execution.

Common Applications for Finance and Accounting Leaders

Month-End Close Acceleration

MCP-connected Claude can pull your trial balance, identify unreconciled items, and surface anomalies without you generating a single export. Ask it to review your journal entries for the period, flag anything that looks off, and draft explanations for your auditors — all in one conversation.

Financial Reporting on Demand

Instead of waiting for a scheduled report run or asking your FP&A analyst to pull numbers, you can ask Claude directly: "Give me our income statement for Q1 compared to Q4, and explain the biggest variances." With MCP access to your ERP's reporting endpoints, Claude returns the answer live — not a static export from last Tuesday.

Contract and Revenue Intelligence

Finance leaders managing subscription businesses often struggle to get a clear picture of contract status, amendment history, and recognized revenue in one place. With MCP, Claude can pull contract details, surface upcoming renewals, preview amendment impacts, and cross-reference with your AR to flag anything that's slipped.

AP and Vendor Management

Ask Claude to list all open bills from a specific vendor, check payment status, and draft a summary for your controller — without logging into your ERP. Or automate the creation of bill payments for approved invoices as part of a broader workflow.

Cash Flow Visibility

Connect Claude to your bank accounts and ask it to summarize cash movements over the past 30 days, flag unusual transactions, and project your runway based on current burn. Real-time data, natural language output.

Board and Investor Reporting

Pull your ARR waterfall, balance sheet, and cash flow statement in a single prompt, then ask Claude to draft the financial narrative for your board deck. The combination of live data access and Claude's writing ability makes this a genuinely fast workflow — not a 2-hour exercise.

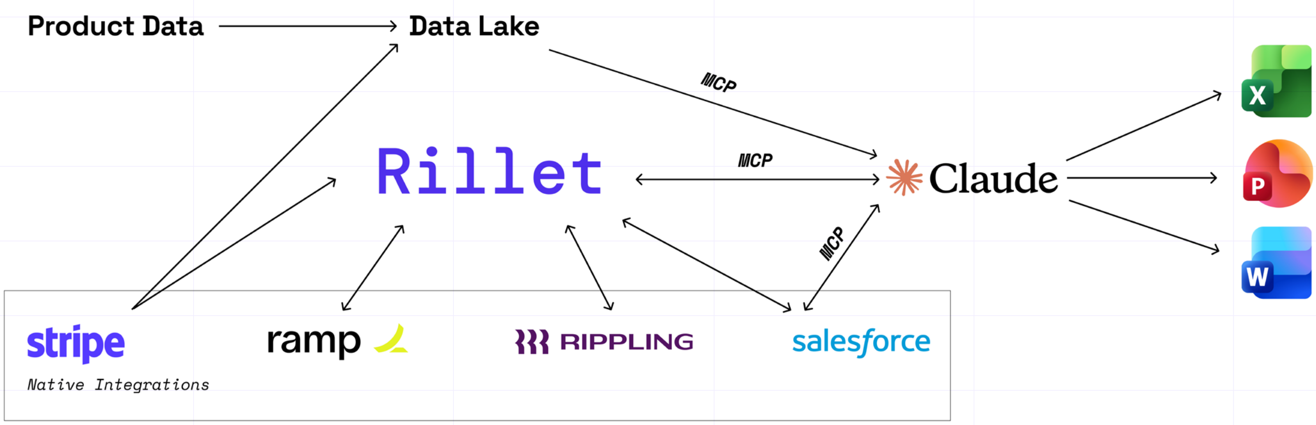
> **"What changed with MCP is that the AI finally has context. When Claude can see your actual GL — your real transactions, your real vendors, your real close status — it stops giving you generic answers and starts giving you answers that are actually useful. That's a completely different tool."**

— Stephen Hedlund, Head of Finance, Rillet

How Rillet Customers Are Using MCP

Rillet's MCP server gives Claude direct access to your general ledger and the full breadth of your financial data — accounts, subsidiaries, contracts, invoices, journal entries, bank transactions, credit memos, vendors, and every standard financial report your team runs.

Here's what that looks like in practice.



Getting Started with Rillet's MCP Server

Rillet's MCP server is available at https://docs.api.rillet.com/mcp. Once connected, Claude has access to your full financial data layer — including accounts, subsidiaries, contracts, invoices, journal entries, vendors, bank transactions, and all standard financial reports (trial balance, income statement, balance sheet, cash flow, ARR waterfall).

The setup takes minutes. Your Rillet API key is all you need.

"We built our MCP server so finance teams could get value from day one, not after weeks of configuration. When the data comes in clean and structured, Claude can work with it immediately. That's the whole point."

— Kristen Pascoe, Head of Product, Rillet

See It Live in Rillet's Weekly Product Tour

AI workflows in action and ask questions in real time alongside your peers.

[Register for the upcoming session here]

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Rillet is the AI-native ERP built by accountants for accountants, designed from the ground up around Continuous Close architecture. To learn more, visit rillet.com.