ERP NEWS
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# When People and ERP Work Together with AI

*the human–algorithm alliance in action*




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ERP NEWS

CEO & PUBLISHER
Harun DOYURAN
harun@erpnews.com

MANAGING DIRECTOR
Pinar SENGUL
pinar@erpnews.com

EDITOR
Pinar SENGUL
pinar@erpnews.com

ASSOCIATE EDITORS
Katie SLIMOV
katie@erpnews.com

Burcu Nihal DEMIRCI
burcu@erpnews.com

ART DIRECTOR
Sena Çarlık
sena@erpnews.com

FOR ADVERTISING
advertise@erpnews.com

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# EDITOR'S NOTE

When People and ERP Work Together with AI – The Human–Algorithm Alliance in Action

Artificial intelligence is rapidly becoming part of the fabric of enterprise software. But as organizations move beyond experimentation and begin embedding AI into ERP, finance, operations, and public services, a more nuanced reality is emerging: the future of enterprise technology is not about replacing people. It is about enabling people and intelligent systems to work together.

That is the theme of this month's ERP News Magazine.

Throughout this issue, we explore how AI is transforming enterprise workflows, reducing operational friction, accelerating decision-making, and helping organizations unlock greater value from their ERP investments. Yet the most compelling stories are not about algorithms alone. They are about the changing relationship between human expertise and machine intelligence.

This edition features executive perspectives from a broad range of ERP, finance, AI, and enterprise technology leaders. Their insights reflect a shared belief that AI delivers the greatest value when it amplifies human capabilities, supports better decisions, and operates within trusted, transparent business environments.

We are also pleased to present three in-depth executive Q&As that examine how this transformation is unfolding across different industries and operational contexts.

At OpenGov, Adam Rykowski, Chief Product Officer, discusses how government ERP is evolving from a system of record into a connected platform for execution, where AI, shared data, and unified workflows help public sector organizations operate more effectively.

At Basware, Jon Stevens, who leads Global Business Development, explores how SAP modernization is reshaping accounts payable, why clean core strategies matter, and how AI is changing finance operations as organizations prepare for the next generation of ERP.

And at WorkStream Technology, Rob Townsend, Founder and CEO, shares his perspective on the hidden operational challenges of large-scale Workday transformations, the growing legacy support gap, and why successful modernization requires organizations to think beyond technology alone.

Taken together, these conversations reveal an important shift. AI is no longer a separate capability layered onto enterprise systems. It is becoming part of the operational fabric of the organization — embedded into workflows, connected to business context, and designed to augment human expertise rather than replace it.

The next generation of ERP will not be defined solely by automation or intelligence. It will be defined by collaboration — between people and algorithms, between data and decisions, and between technology and the organizations that rely on it every day.

As always, we hope this issue provides fresh perspectives, practical insights, and inspiration for the journey ahead.



Pinar SENGUL, EDITOR

ERP NEWS

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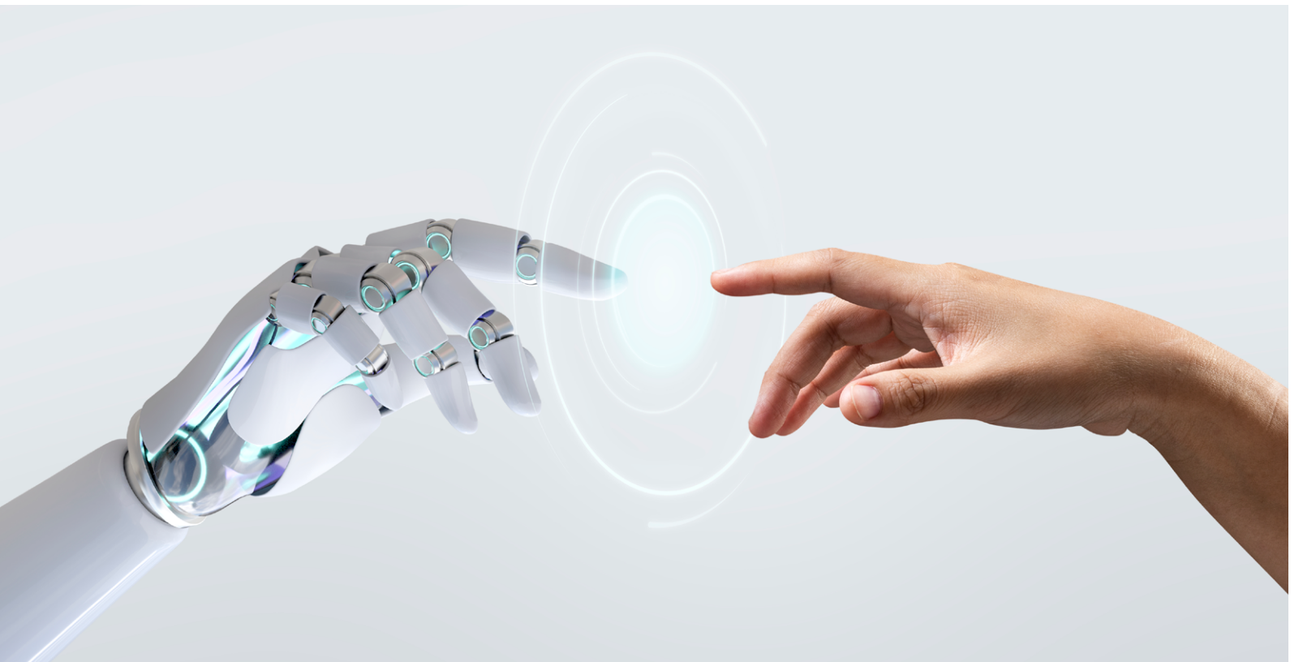
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# Jon Stevens of Basware on SAP Modernization, Clean Core Strategies, and the Future of Accounts Payable

www.basware.com

*As enterprises prepare for the end of SAP ECC support in 2027, finance leaders are facing one of the most significant transformation cycles in recent memory. Unlike previous ERP upgrades focused primarily on efficiency and modernization, today's migrations are increasingly centered on resilience, governance, and the ability to support AI-driven finance operations in the cloud era.*

Accounts payable has emerged as a critical focal point in this transition. Once viewed primarily as a transactional function, AP is now becoming a strategic control layer that influences supplier relationships, cash visibility, compliance, and enterprise-wide financial intelligence. At the same time, organizations are navigating clean core requirements, global e-invoicing mandates, and increasingly complex hybrid ERP environments.

In this Q&A, Jon Stevens, who leads Global Business Development at Basware, discusses how finance organizations are approaching SAP modernization, why invoice lifecycle management is becoming a strategic priority, and how AI is reshaping the future of accounts payable. He also shares his perspective on the risks of recreating legacy complexity in cloud ERP environments and what separates successful transformation initiatives from costly migrations that fail to deliver long-term value.

**1. With the 2027 SAP ECC support deadline approaching, how are ERP migration priorities changing for CFOs and finance leaders compared to previous modernization cycles?**

Previous modernization cycles were closer to typical technical upgrades, but the upcoming ERP migration involves a scale of complexity and cost, to the tune of tens of millions of dollars in many cases, that many organizations haven't gone through before.



*Interview with*
Jon Stevens,
Senior Vice President,
Basware



Previous cycles were largely about modernization and efficiency for CFOs and CIOs. This time around is about resilience, control and what comes next.

**2. Why do accounts payable processes so often become one of the biggest operational pressure points during large-scale ERP migration programmes?**

Paying your suppliers, right as you're swapping everything out in your ERP is risky. Imagine if you had to upgrade your phone, but you couldn't buy anything using all of the existing apps you'd uploaded on your phone for 90 days. If AP breaks, the consequences are immediate, with supplier trust lost, payment risk showing up immediately and cash visibility limited in real-time.

Ultimately, AP is the control layer rather than just another process. The invoice lifecycle needs to be governed properly, rather than simply digitizing.

**3. Many organizations focus heavily on infrastructure and core ERP deployment during transformation. Are some enterprises underestimating the operational complexity of maintaining finance continuity throughout the migration process?**

The scale and complexity of these transformations are unique. Many have done individual rollouts or bolt-ons, but most haven't undertaken a transformation of this magnitude for over 10 years since their original ERP was first purchased.

It's also compounded by an organization's ERP becoming more and more complex over time, with customizations, new divisions within the business and new regulations to contend with, making migrations more challenging.

**4. Basware has positioned Invoice Lifecycle Management as an "AP value accelerator" for SAP Cloud ERP environments. In practical terms, what operational or financial gaps are enterprises trying to solve?**

Trust within the supply chain and for customers is so integral which makes AP vital. Many customers we speak to are working on migrating the AP function first, partly due to the importance it plays within a business, and because it's a more manageable transition that can be completed in a matter of months and prove value. Once challenges are ironed out with AP, CFOs and CIOs can also demonstrate how AI is used in this space, using the migration as a baseline to then roll SAP out beyond that.

**5. Basware is among the first AP providers to achieve SAP Clean Core certification. From an enterprise perspective, why is clean core becoming such a critical issue in large-scale SAP modernization programmes?**

Keeping the ERP core as un-customized as possible helps businesses stay agile, lowering future costs and upgrading pains, while safeguarding businesses from rebuilding the complexity that's made the migration difficult this time around.
SAP recommends using best-of-breed solutions to remove customizations from the ERP but keep them clean and core to the system by using solutions within the Business Technology Platform (BTP) Connector that integrates with other technologies. Basware built out Invoice Lifecycle Management to be fully compliant with the BTP Connector for exactly that reason.

**6. What are the long-term risks of relying on custom middleware, fragmented integrations, or heavily customized AP processes during SAP Cloud ERP transitions?**

If you don't have a clean core, then data is left siloed across different systems, which makes it difficult to access certain data flows required for financial reporting, for example. That has a wider impact on AI adoption, with agents unable to operate seamlessly between business functions or being slowed down with data errors, while also losing enterprise-wide financial control.

When the ERP is fully integrated, there's greater visibility, transparency and ease of use for users, and native integration allows AI agents and strategy to sit across the entire platform. That also helps businesses look to grow and expand overseas, especially in areas like compliance.

"ERP transformations shouldn't be viewed as a tech upgrade, it's a process upgrade. The winners are the organizations that use transformations like this to simplify and govern the invoice lifecycle, rather than just moving it."

**7. Many global organisations are currently operating across mixed ERP landscapes. What challenges do enterprises face when trying to standardize AP processes and compliance frameworks across both SAP and non-SAP environments?**

Not all customers have SAP as their only ERP all over the world, meaning there can be inconsistent AP processes, challenges meeting country-by-country compliance requirements and difficulty avoiding stitched-together local solutions. The challenge is not simply integrating SAP and non-SAP systems, it is standardizing governance across environments. With Basware, SAP customers easily get access to our global compliance solutions due to the native integration, taking the stress away from finance and AP teams.

"This time around is about resilience, control and what comes next. Previous modernization cycles were largely about modernization and efficiency for CFOs and CIOs. The upcoming ERP migration is fundamentally different."

**8. How is AI changing the role of accounts payable from a transactional finance function into a more strategic source of operational and cash-flow intelligence?**

AI allows automation rates to climb quickly and to make invoice processing as touchless as possible.

It helps CFOs gain more insights and visibility to help with strategic decisions, such as cash flow. Increasingly, due to AI, AP teams are now shifting from tactical work towards strategic advisory, for example looking at where and how they should be spending.

**9. With global e-invoicing mandates continuing to expand, how should enterprises balance compliance requirements, automation goals, and ERP modernization within the same transformation roadmap?**

Most organizations don't have enough resources to monitor all of the global changes for compliance, especially when an area such as tax has different requirements country by country. Tax and AP teams often need a partner in this area, and working with specialist providers like Basware, who already monitor compliance changes and anticipate what's coming in future, helps maintain compliance and balance these goals.

**10. Looking ahead, what separates organisations that successfully modernize finance operations during SAP transformation from those that simply recreate legacy complexity within a new cloud environment?**

A big issue among companies that struggle with this upgrade is trying to do too much in one go. An entire migration takes too long in comparison to transforming as a singular area, such as AP, making it harder to demonstrate value to the business quickly or showcase cost savings. There needs to be change management with small increments, piloting a smaller change before rolling it out when it delivers ROI.

ERP transformations shouldn't be viewed as a tech upgrade, it's a process upgrade. The winners are the organizations that use transformations like this to simplify and govern the invoice lifecycle, rather than just moving it. That helps leaders prioritize ROI and drive value to customers and employees as fast as possible.

***About Jon Stevens***

*Jon currently leads the Global Business Development organization for Basware. Jon spent nearly 20 years at Ariba/SAP. At Ariba, he led several go-to-market sales teams; he was responsible for the global partnerships and alliances; and he helped position the company for sale to SAP.*



## Phil Abbott IT & ERP Consultant, *ABS Limited*

"AI's real value in enterprise systems isn't just surfacing data faster - it's handling the routine load that slows people down. When AI tackles repetitive logic and process steps, teams spend less time learning systems and more time on what actually matters to the business. The shift from "I need to understand this tool" to "this tool understands what I'm trying to do" changes everything. Better training outcomes, fewer support tickets, faster onboarding. The human-algorithm alliance works when AI absorbs the friction, leaving people free to focus on decisions that require judgment and context. That's where real productivity gains live."



***About Philip Abbott***

Phil leads a team of specialists to efficiently implement IT systems, including ERP software, to a variety of client businesses, across manufacturing, retail and healthcare. With over 25 years of experience in supplying IT solutions and analysis to optimise business operations and performance, he previously worked at LegalMentor, ECommerce Strategies Ltd and Cazenove Capital Management. Having worked in the IT industry for his entire career, with experience in portfolio management and ecommerce, Phil offers a unique perspective and understanding of cross-industry business and technology requirements combined with detailed integration knowhow.




# Rob Townsend of WorkStream Technology on the Hidden Risks of Workday Transformation and the Growing Legacy Support Gap

*www.workstream.us*

*As organizations accelerate their transition from legacy ERP and HCM systems to modern cloud platforms, the focus often centers on the destination: new capabilities, improved user experiences, and the promise of greater agility. Yet for many enterprises, the most difficult challenges emerge not after go-live, but during the years-long period when legacy and cloud environments must coexist.*

For companies moving from PeopleSoft to Workday, this transition can create what some industry observers describe as a "legacy support vacuum" — a situation where critical institutional knowledge, operational support, and technical expertise are stretched across both environments. At the same time, organizations must maintain payroll, benefits, compliance, integrations, and business continuity while building their future-state architecture.

In this Q&A, Rob Townsend, Founder & CEO of WorkStream Technology, discusses why large-scale ERP and HCM transformations are as much organizational challenges as technology projects. He shares his perspective on the operational risks of running parallel environments, the evolving role of implementation and managed services partners, and why successful modernization requires organizations to rethink how they support both legacy systems and next-generation platforms throughout the transformation journey.

**1. You've described what you call a "legacy support vacuum" during large-scale Workday transitions. Why do you think this issue remains under-discussed across the enterprise technology market?**

Because the conversation about ERP transformation tends to start and stop with the new platform. The Workday go-live gets all the attention — the roadmap, the budget, the executive sponsorship. What doesn't get the same airtime is what happens to the system the organization is still running the business on while that transformation is in flight. PeopleSoft doesn't pause while Workday is being built. Payroll still runs. Open enrollments still happen. Compliance deadlines don't move. And the team that knows that environment best is often the same team being pulled into the Workday deployment because they're the domain experts. That's the vacuum — and most organizations don't realize how exposed they are until something breaks in the legacy environment six months into a multi-year program.



*Interview with*
Rob Townsend,
Founder & CEO,
WorkStream Technology

**2. Many large organizations are running multi-year Workday transformation programmes while still relying heavily on PeopleSoft in parallel. Where do these environments become most operationally fragile?**

A few places stand out consistently. The first is talent — when your best PeopleSoft resources get pulled into Workday workstreams, the institutional knowledge walking out of the legacy environment is real and often underestimated. The second is release management. PeopleSoft still requires regular PUM image updates, tax updates, and PeopleTools maintenance. Organizations in the middle of a transformation often deprioritize that work, and the technical debt accumulates quickly. The third is integrations. Most large PeopleSoft environments have years of custom integrations built up — payroll vendors, benefits carriers, finance systems. Those don't automatically translate to the new platform, and the mapping work required is almost always more complex than the original estimate. When you're running both environments at once, you're essentially operating two parallel ecosystems, and the seams between them are where things go wrong.

**3. From your perspective, what are the most common reasons enterprise HR transformation projects slow down or become more complex than originally expected?**

Data readiness is probably the most consistently underestimated. Organizations discover mid-program that their PeopleSoft data is messier than anyone knew — inconsistent coding structures, years of workarounds embedded in the configuration, historical records that don't map cleanly to Workday's data model. Cleaning that up takes time and skilled people who understand both systems. Beyond data, scope creep is a close second. The original business case tends to focus on the core modules, but as the program matures, business stakeholders start surfacing additional requirements that weren't in scope. And then there's change management — the human side. Workday is a meaningfully different user experience than PeopleSoft. Getting end users and managers to actually change how they work is harder than getting the technology to work, and it's often resourced last.

**4. You mentioned that challenges often emerge around integrations, reporting, release management, and data conversion readiness. Why are these areas consistently underestimated?**

They're not the exciting part of the program. Integrations, reporting, release management — these aren't the things that show up in the executive presentation about the transformation vision. They're foundational, they're unglamorous, and they require deep technical knowledge of the legacy environment that the implementation partner often doesn't have. Most Workday SIs are genuinely excellent at configuring Workday. But they didn't live in your PeopleSoft environment for the last fifteen years. They don't know why that custom integration to your benefits carrier was built the way it was, or what the reporting logic in that HCM query is actually doing. That knowledge gap shows up as schedule risk, cost overruns, and post-go-live instability. The organizations that handle these areas well are the ones that keep someone in the room who knows the legacy system as well as someone knows the new one.

**5. How has buyer expectation evolved in terms of partner responsibility during ERP and HCM transformation programmes?**

Buyers are much more sophisticated than they were five years ago. They've watched enough enterprise transformation programs — their own and others' — to know that handing everything to a single large SI and hoping for the best doesn't always work out. What we're hearing more often is that organizations want partners who are accountable for outcomes, not just deliverables. There's also a growing recognition that transformation doesn't end at go-live — that post-go-live AMS and optimization is where a lot of the actual value gets realized or lost. Buyers are starting to think about the full lifecycle of

the program from the beginning, rather than treating AMS as something to figure out after the fact.

**6. Traditionally, implementation partners have focused primarily on the future-state platform. Why is the market now demanding more end-to-end operational coverage across both legacy and post-go-live environments?**

Because the assumption that implementation and operations are separate problems has proved expensive. You can have a technically successful Workday go-live and still end up with an organization that's struggling operationally six months later because the support model wasn't in place. And on the legacy side, the assumption that the existing team can absorb the additional operational burden during a multi-year transformation — while also contributing to the deployment — has also proved unrealistic at scale. The market is moving toward a model where the partner is accountable for the organization's operational stability across the entire transition period, not just for hitting a go-live milestone. That's a different kind of engagement, and it requires a different kind of partner.

**7. What does Workday AMS certification represent strategically for WorkStream, beyond the certification itself?**

It's a signal to the market about what we're building. WorkStream was founded on PeopleSoft expertise — that's where our roots are, and that depth is real. But the clients we're working alongside are in motion. They're moving to Workday, or they're already there and trying to get more out of it. Workday AMS certification means we can be a credible long-term partner across that entire journey — not just the legacy side. It also changes the conversation we can have with prospects. We're not asking an organization to choose between their PeopleSoft expertise and their Workday needs. We sit at that intersection, and increasingly that's exactly where our clients need someone.

**8. In your view, what separates organizations that manage complex transition periods successfully from those that struggle operationally?**

It comes down to how honestly they assess the gap between where their internal team can realistically play and where they actually need help. The organizations that struggle tend to overestimate internal capacity — they assume the people who built the PeopleSoft environment will somehow also manage the Workday deployment and keep the lights on at the same time. The organizations that navigate it well make deliberate decisions early about where to supplement. They're not embarrassed to bring in outside support for the legacy environment so their best people can focus on the transformation. They also tend to have better program governance — someone in the room whose job it is to look across both environments and ask hard questions about what's at risk. The technical work is solvable. The organizational dynamics are where things go sideways.

> "ERP transformations shouldn't be viewed as a technical project alone. The organizations that treat modernization as an organizational transformation that happens to involve technology tend to land better."

**9. As enterprise transformation cycles become longer and more resource-intensive, how do you see the support services model evolving over the next few years?**

The distinction between implementation and managed services is going to blur further. The old model — implement, stabilize, hand off to a support team — doesn't fit a world where organizations are running parallel environments for three to five years and then landing on a platform that requires continuous optimization. What I think we'll see is longer, more integrated engagements where the partner is involved from initial planning through post-go-live optimization, with accountability that spans the full program. There's also going to be more pressure on cost and delivery efficiency — global delivery models, AI-assisted support, more automation in routine AMS work. The firms that will do well are the ones that can bring that efficiency without losing the domain depth that actually makes the support valuable.

**10. Looking ahead, what do you think the broader Workday and enterprise applications ecosystem still underestimates about modernization at scale?**

The human and organizational side of it. The technology, at this point, is genuinely impressive — Workday keeps getting better, the tooling is more capable, the implementation methodology is more mature. What the ecosystem still tends to underweight is how hard it is to move large, complex organizations through a change of this magnitude. The institutional knowledge embedded in a fifteen-year-old PeopleSoft environment isn't just technical — it's the accumulated decisions of hundreds of people about how the organization actually runs. That knowledge doesn't automatically transfer to the new platform. The organizations that treat modernization as a technical project tend to struggle. The ones that treat it as an organizational transformation that happens to involve technology tend to land better. The ecosystem talks a lot about digital transformation. I'd like to see more honest conversation about what it actually takes to get there.

WorkStream TECHNOLOGY



**Adam Rykowski, Chief Product Officer,**
***OpenGov***

> For decades, government technology has focused on documenting work after it happens. The next generation of ERP will help governments execute work as it happens. AI, automation, and connected data are transforming ERP from a back-office application into the operational backbone of government. Our vision is an AI-native Public Service Platform that helps agencies move faster, work smarter, and better serve residents while ensuring people remain at the center of every decision.



***About Adam Rykowski***
Adam brings 20 years of product leadership to OpenGov, where he serves as Chief Product Officer, driving product strategy, innovation, design, and execution across the company's product offerings. Throughout his career, he has led product and design teams—spanning early-stage startups to scaled, public companies—specializing in multi-product portfolios. Prior to OpenGov, Adam was VP of Product at OneTrust, where he led the product team through the company's growth, driving its transformation product to a platform. Previously, Adam spent 10 years at VMware following its acquisition of AirWatch, a startup he joined as the first product manager, guiding the company's growth from startup to scale. Adam is passionate about building great products that drive meaningful impact. He holds a degree in Industrial and Systems Engineering from Georgia Tech and contributes to his community as a youth wrestling coach, mentoring young athletes and fostering teamwork and discipline.




# Adam Rykowski of OpenGov on How Connected Data and AI Are Transforming Government ERP

[www.opengov.com](www.opengov.com)

*For decades, ERP systems in government have primarily served as systems of record, managing financial transactions, budgets, workforce data, and operational information. But as public sector organizations face growing pressure to improve service delivery, increase transparency, and operate more efficiently, expectations around enterprise platforms are changing.*

At the same time, advances in artificial intelligence are creating new opportunities to automate routine work, improve decision-making, and connect previously fragmented processes across government departments. Rather than functioning solely as administrative systems, ERP platforms are increasingly becoming operational environments that support execution, collaboration, and real-time action.

OpenGov is among the companies helping drive this shift through its AI-native Public Service Platform, which brings together ERP, workforce management, permitting, infrastructure, and asset management on a unified foundation. In this ERP News Q&A, Adam Rykowski, Chief Product Officer at OpenGov, shares his perspective on the future of AI-enabled government operations, the importance of connected data, and why ERP is evolving into a system of action rather than simply a system of record.

**1. ERP in the public sector has traditionally been seen as a system of record. How is that definition changing as platforms become more operational and execution-focused?**

ERP in government has historically been viewed as a system of record, but the reality is most ERPs implementations in government end up as multiple systems not connected consistently, making it difficult to use the data in their day to day work. What we've heard consistently from customers is



*Interview with*
Adam Rykowski,
Chief Product Officer,
OpenGov

that disconnected systems create friction across finance, operations, assets, permitting, and workforce management, and agencies are increasingly asking for a better system that helps them execute. Our focus has been building a connected platform that brings together every function involved in running a city, county, or state agency on a shared system, with AI working alongside public servants.

**2. OpenGov is positioning its platform as "AI-native." What does that mean in practical terms for government agencies beyond adding AI features on top of existing systems?**

For us, AI-native means AI is embedded into the core of the platform, not layered on afterward as a separate tool. Whether it's AI Review in permitting, contract authoring and review, automation in ERP workflows, or AI-driven insights across finance and operations, the goal is the same: reduce repetitive manual work, improve accuracy, and help teams make faster, better-informed decisions while staying fully in control.

**3. A key part of your announcement is the move toward a unified platform across finance, workforce, infrastructure, and permitting. What challenges are agencies facing today makes this level of integration necessary?**

Governments have told us they are often dealing with fragmented systems that don't communicate with one another. Finance, HR, permitting, asset management, and operations often operate in separate environments with different processes and different sources of truth. This creates inefficiency, slows decision-making, and makes it harder to align priorities across departments. That's why we're bringing ERP, HCM, permitting, and asset management together on a unified platform with a common data model to enable consistent workflows across departments.

**4. OG Assist is embedded directly into workflows rather than existing as a separate tool. How does this change the way government teams interact with data and systems on a day-to-day basis?**

Our goal is to make it as easy as possible to get started with AI. Embedding OG Assist directly into workflows changes AI from something employees have to seek out into something available inside the work they're already doing. So much cognitive load goes into jumping between systems or manually searching for information. With OG Assist, teams can interact with their data in real time, surface insights faster, automate routine tasks, and focus more of their time on higher-value work. It also can be used to onboard new employees and teach teams the best practices for their jobs.

**5. Many organizations are still navigating the balance between automation and control, particularly in regulated environments. How do you approach this in the context of AI-driven public sector operations?**

No matter how advanced AI becomes, human judgment remains essential, especially in government, where decisions directly impact communities, public trust, and people's daily lives. AI should support public servants, not replace accountability, oversight, or decision-making responsibility. At the end of the day, people are ultimately responsible for the actions taken when AI is used, which is why we take responsible AI deployment very seriously. That means building systems grounded in transparency, security, permissions, and human review so governments can use AI in practical, trustworthy, and accountable ways.

> "AI should support public servants, not replace accountability, oversight, or decision-making responsibility. At the end of the day, people are ultimately responsible for the actions taken when AI is used."

**6. Data fragmentation has long been a challenge in government systems. How does a shared data foundation change decision-making at both operational and leadership levels?**

Government work ultimately revolves around workflows, approvals, compliance, budgeting, permitting, procurement, service delivery, and more. The challenge is that many agencies still rely on disconnected systems, which causes those workflows to break down across departments and limits visibility into what's actually happening operationally. Users introduce workaround and manual steps and this data fragmentation makes it nearly impossible to introduce AI into these workflows, since AI needs good data as context to be effective.

Additionally, leadership often struggles to get a complete picture of finances, infrastructure, workforce capacity, and community priorities in one place. A connected platform built on a common data foundation helps bring those functions together, giving teams greater visibility, consistency, and confidence in how they make decisions and execute work.

**7. The expansion into enterprise asset management introduces more proactive planning capabilities. How important is this shift from reactive to predictive operations in the public sector?**

Managing public assets is one of the most critical and most expensive responsibilities government agencies have because it impacts everything from roads and utilities to parks, fleets, and public facilities. Yet in many organizations, these operations are owned across separate departments, forcing teams to make high-stakes infrastructure decisions reactively rather than strategically.

OpenGov has been helping agencies manage infrastructure and public assets for years, and we've consistently seen that governments need better visibility, coordination, and long-term planning capabilities to keep pace with growing demands and aging infrastructure. That's why the shift from reactive to predictive operations is so important. Agencies are under increasing pressure to do more with limited resources while making smarter, more defensible taxpayer investments.

Customers discuss how OpenGov Enterprise Asset Management is helping them move toward a more proactive operating model. Capabilities like Scenario Builder and Work Planner allow agencies to evaluate tradeoffs across asset classes, connect long-term capital planning to day-to-day execution, and make more informed operational and financial decisions before problems become emergencies.

**8. Permitting is often cited as one of the most complex and time-consuming government processes. Where are you seeing the most immediate impact from AI in this area?**

We're transforming the entire permitting and licensing department using AI to make it faster to issue permits. The immediate impact from AI comes from streamlining manual review work to catch issues earlier in the process, and reducing repetitive, redundant tasks. Customers described how time-intensive reviewing building plans can be and how difficult it has historically been to standardize intake and review processes. AI Review helps flag common issues earlier, reduce back-and-forth, improve consistency, and give staff more time to focus on areas that truly require human judgment.

**9. From your perspective, what are the biggest barriers preventing agencies from moving toward more connected, AI-enabled operational platforms?**

One of the biggest barriers is that change itself can feel risky for government agencies, especially after years of difficult implementations, disconnected vendors, and technology that created more frustration than trust. Many teams have been through modernization efforts that overpromised and underdelivered, which naturally makes organizations cautious.

> "We see ERP evolving from a standalone back-office system into a core component of the government operating system. The value will unlock from connected systems and a shared data foundation, not disconnected tools layered on top of legacy software."

But the reality is that standing still is often the bigger risk. Communities' expectations continue to rise, workloads are increasing, and legacy systems make it harder for agencies to make informed decisions efficiently and coordinate across

departments. What we've consistently seen is that agencies want to embrace transformation but the technology must be practical, collaborative, and built alongside them rather than imposed on them. The same is true with AI. Adoption happens when employees see the technology helping them do their jobs more effectively, improving visibility and execution, while still keeping human judgment, accountability, and oversight at the center of every decision. We have built OG Assist with these first principles to make it easy to use and focused on real world problems.

**10. Looking ahead, how do you see the role of ERP evolving in government environments over the next 3–5 years, particularly as AI becomes more embedded in decision-making and execution?**

We see ERP evolving from a standalone back-office system into a core component of the government operating system. This is why we have built the Public Service Platform. As AI becomes more embedded into workflows and decision-making, government officials will be able to come up with better, faster, more innovative ways to serve their communities. This is happening across many sectors, and I believe the workforces across our government include some of the best people tackling some of the most important problems, and can become true leaders in this AI transformation with the right platform.

The value will unlock from connected systems and a shared data foundation, not disconnected tools layered on top of legacy software. Governments need finance, workforce, infrastructure, permitting, procurement, and service delivery operating together in one unified system so leaders can make faster, more informed decisions with greater visibility across the organization. In that model, ERP becomes part of the operational backbone that powers execution across government and accelerates AI adoption, helping agencies automate routine work, improve coordination, and deliver services more effectively, while still ensuring human judgment, accountability, and oversight remain central to every decision.

***About Adam Rykowsk***

*Adam brings 20 years of product leadership to OpenGov, where he serves as Chief Product Officer, driving product strategy, innovation, design, and execution across the company's product offerings. Throughout his career, he has led product and design teams—spanning early-stage startups to scaled, public companies—specializing in multi-product portfolios.*

*Prior to OpenGov, Adam was VP of Product at OneTrust, where he led the product team through the company's growth, driving its transformation product to a platform. Previously, Adam spent 10 years at VMware following its acquisition of AirWatch, a startup he joined as the first product manager, guiding the company's growth from startup to scale.*

*Adam is passionate about building great products that drive meaningful impact. He holds a degree in Industrial and Systems Engineering from Georgia Tech and contributes to his community as a youth wrestling coach, mentoring young athletes and fostering teamwork and discipline.*








# Closing the Last Mile of ERP Transformation: Integrating Payments and Treasury

*ERP transformation has fundamentally changed enterprise finance. Cloud ERP adoption, standardized workflows, and stronger reporting have helped organizations operate with greater visibility, consistency, and efficiency. Across industries, ERP systems now serve as the financial system of record for the enterprise.*

Despite this progress, ERP transformation still faces a critical gap – a system of record is not the same as a system of execution. In many organizations, payments and treasury operations still occur outside ERP, spread across banking portals, third-party tools, spreadsheets, and manual approvals. That separation creates a practical gap between financial data and the actions that move cash, release payments, enforce controls, and manage liquidity.

The gap has become a strategic issue for finance leaders. CFOs, treasurers, and cash management teams are being asked to improve liquidity visibility, strengthen controls, and make faster decisions in increasingly complex financial environments. When payment execution and treasury policy sit outside ERP, those teams lose the real-time context – driving substantial limitations for cash management.



*Article by*
Dinesh Kumar,
President, ERP Practice,
22nd Century Technologies
22nd Century Technologies, Inc.

*Article by Dinesh Kumar*

The limitations show up quickly in daily operations. Treasury teams may lack a current view of enterprise cash positions. Payment routing may depend on disconnected approvals. Reconciliation may require manual effort across multiple systems.

Fragmented treasury execution can also limit an organization's ability to optimize liquidity through automated cash sweeps, intelligent fund balancing, and policy-driven transfers that improve operational efficiency and help generate meaningful overnight interest earnings across enterprise cash positions.

One of the most significant challenges is that treasury policy itself often exists outside operational systems. Policies governing liquidity thresholds, payment approvals, routing rules, and risk controls frequently reside in static documents, spreadsheets, or institutional knowledge rather than being embedded directly into execution workflows.

As organizations adopt more automation, intelligent workflows, and AI-driven financial operations, this becomes a critical issue. The future of treasury operations lies in policy-driven AI agents capable of acting in real time, replacing labor-intensive processes built around retrospective validation. To support this shift, organizations need governance frameworks, continuous policy guidance, and real-time alerting that adapt dynamically alongside treasury functions. In environments where generative and agentic AI are beginning to influence treasury management functions, transparency, auditability, and policy-driven governance become foundational requirements for financial execution.

**This is driving a broader shift toward policy-driven financial execution.**

Rather than treating ERP only as the place where transactions are recorded, organizations are beginning to use it as the control center for financial operations – integrating payments, treasury, policy management, and execution workflows directly into core financial environments.

This approach enables tighter alignment between data and action. Treasury teams gain better visibility into liquidity positions, finance leaders gain stronger control over policy execution, and organizations reduce fragmentation across systems and banking relationships.

It also creates a stronger foundation for automation. AI-driven processes can support payment routing, anomaly detection, cash positioning, and operational decision-making at a greater scale. But the effectiveness of automation depends on integration with core financial systems and policy-driven governance. AI should operate within clearly defined financial frameworks that are transparent, auditable, and aligned to treasury policy.

For treasury teams, this shift can improve both speed and control. Integrated payment and treasury workflows can provide better visibility into cash and liquidity positions, reduce manual reconciliation, streamline approvals, and help teams respond more quickly to funding needs or exceptions. For finance leaders, it also improves confidence that policy is being applied consistently, and that decisions are based on current financial information.

Organizations making progress in this area are focusing on several priorities:

- Bringing treasury and payment execution closer to ERP workflows
- Embedding treasury policy directly into operational systems
- Improving overnight interest earnings and liquidity optimization through automated cash sweeps and intelligent fund balancing across banks and treasury counterparties
- Improving real-time visibility across cash and liquidity positions
- Reducing reliance on manual reconciliation and disconnected approvals
- Applying automation and AI within governed financial frameworks

"ERP transformation has already improved how organizations manage financial data. The next opportunity is to close the gap between financial data and financial execution. Payments and treasury integration represent the last mile of that journey."

The technology ecosystem is evolving to support this shift. ERP-centric treasury and payment platforms are emerging to help organizations centralize execution, improve governance, and integrate financial decision-making more directly into enterprise systems. As treasury leaders evaluate next-generation operating models for ERP-centric financial execution, they are beginning to explore platforms that combine policy-driven orchestration, AI-enabled treasury intelligence, and integrated payment operations within governed enterprise environments.

22nd Century Technologies' Payment Gateway platform is one example of this emerging model. Built on native Oracle Cloud technologies, Payment Gateway is *available for demonstration* to treasurers looking for improved visibility, control, and financial responsiveness through policy-driven, ERP-centric operations.

ERP transformation has already improved how organizations manage financial data. The next opportunity is to close the gap between financial data and financial execution. Payments and treasury integration represent the last mile of that journey. Organizations that connect policy, ERP data, automation, and execution will be better positioned to optimize liquidity, strengthen resilience, and realize the full value of their ERP investments. This would extend native cash management capabilities directly into the ERP environments where finance teams already work – Oracle Fusion, Oracle EBS, NetSuite, PeopleSoft, Workday, SAP, and others – reducing reliance on standalone treasury systems.

***About Dinesh Kumar***

*Dinesh Kumar, SCPM, SDRM, serves as the President of the ERP Practice at 22nd Century Technologies, Inc. (TSCTI). Based in Herndon, Virginia, he is a key executive leader overseeing Enterprise Resource Planning (ERP) transformations, commercial software additions, and enterprise modernization initiatives for the company.*

22nd Century Technologies, Inc.



*Article by Dinesh Kumar*

Acumatica
The Cloud ERP

## *John Case*, CEO of *Acumatica*

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We have entered an exciting new era where AI turns data into action. These innovative capabilities are spurring ERP's evolution beyond transaction processing to intelligent solutions enabling organizations to gain deeper insights, anticipate challenges, and respond to change with greater agility and confidence. By combining human ingenuity with new AI capabilities, ERP can empower teams to make better decisions and drive better business outcomes.

"



***About John Case***

A seasoned leader and technology executive with deep experience in cloud services, software product management, marketing and brand development, and global sales.




## Why Agentic Context Is More Important Than the AI Model for ERP Teams

*For years, enterprise resource planning (ERP) teams have watched the AI race from the sidelines. Bigger models, faster inference and higher benchmark scores. Impressive on paper. Rarely useful when provisioned.*

That disconnect has a structural cause. Current benchmarks measure performance on mathematics, coding and reasoning. ERP environments demand something different – rule-abiding, compliance-driven decision making that operates within procurement policies, financial controls, approval hierarchies and operational constraints. Foundation models are not evaluated against any of that today. They weren't designed for it.

The result is a familiar frustration: AI tools produce output that is confident, coherent and contextually wrong.

*Article by Ken Fischer*



*Article by*
Ken Fischer,
CEO, Atigro
atigro

**The Model Is Necessary. It Is No Longer Sufficient.**

ERP teams don't run question-answering tools. They run multi-step, interdependent workflows – procure-to-pay, order-to-cash, record-to-report, among many others. When AI graduates from answering questions to executing those workflows, the evaluation criteria change entirely. A model's benchmark score stops mattering. What the model knows about your environment starts mattering enormously.

That environmental knowledge is agentic context. It is not a better prompt. It is the full informational layer that surrounds an agent when it works – the difference between asking a brilliant stranger for a journal entry recommendation and asking a colleague who has spent three years inside your chart of accounts, knows your intercompany policy and can trace every posting back to its source.

For ERP teams, agentic context is built on four pillars – data, memory, practices and transparency.

> "The ERP teams that win with agentic AI will not be the ones using the best models. They will be the ones that give those models the best agentic context – data that is deep and current, memory that persists and learns, practices that align and constrain, transparency that satisfies auditors and builds trust."

**The Four Pillars of Agentic Context in ERP**

***Data –*** Every agent needs something to work with. In ERP, that means live connections to your general ledger, inventory systems, procurement databases, supplier records, CRM, contracts and compliance frameworks, among many other data sources. The breadth and currency of those connections determine whether an agent operates with a full picture or a fragment. The most effective agents will be the ones wired into the richest, most authoritative data, not the ones trained on the largest dataset. Without deep data access, agent output is plausible, and dangerous.

***Memory –*** A single interaction is a transaction. A series of interactions is a relationship. Memory is what makes the latter possible. Prior approvals, past exceptions, period-end decisions and feedback from finance controllers all accumulate into a body of institutional experience agents can draw on. Without memory, every period close starts from zero. With it, the agent builds on what came before – learning which cost centers routinely flag for review, which vendors require extended payment terms, which approval chains collapse under time pressure.

***Practices –*** Two finance teams can request the same variance analysis and mean something entirely different. One wants a lean, data-heavy summary for the CFO. The other wants a document built for an audit committee. Practices capture that distinction – individual style, organizational policy, risk appetite, approval rules, document templates and operating norms. They are the guardrails that keep agents aligned not just with what was asked, but with how the work is supposed to be done. The most capable agent is operationally useless if it consistently produces output that doesn't fit the governance structure of the team relying on it.

***Transparency –*** ERP is a high-stakes, high-audit environment. AI operating inside it cannot function as a black box. Transparency means the agent can show its work – cite the GL line it drew from, flag the policy it applied and surface the confidence level on a reconciliation recommendation. When an agent explains its reasoning and grounds its output in verifiable sources, it moves from tool to accountable partner. In any client-facing or regulator-facing context, this is not a feature. It is a prerequisite.

**Why the Old Architecture Has Hit Its Ceiling**

Agentic AI is not an incremental upgrade. It is a different species of technology. A chatbot retrieves and responds. An effective agent plans, decides, acts and adapts – often without a human in the loop at each step. That leap in capability carries a corresponding leap in complexity and a fundamentally different standard for what success looks like. ERP operations are not simple. They are layered, policy-bound and consequential. The agent that closes a period, flags a duplicate invoice or recommends a hedge position must simultaneously understand macro-level business objectives while adhering to micro-level operational rules. One error, one policy breach, one compliance gap – and they all compound. ERP teams know this better than anyone.

What ERP teams need isn't simply powerful AI. It's AI that makes people faster and decisions sharper – without bending business rules, eroding governance or quietly accumulating audit risk. The measure of success isn't capability alone. It's capability delivered without negative consequence.

**Agentic Context Will Decide ERP Success**

Most conversations about AI in ERP get stuck on model selection, integration complexity and computing costs. Those things matter – but they are table stakes. They do not determine outcomes.

What's missing in most ERP environments is a unifying layer that brings together data, memory, practices and transparency into one reliable environment the AI can consistently work from. The teams building that layer are gaining an edge. Not because they have better models, but because they've built the surrounding infrastructure that makes AI actually useful inside their specific operational context.

The ERP teams that win with agentic AI will not be the ones using the best models. They will be the ones that give those models the best agentic context – data that is deep and current, memory that persists and learns, practices that align and constrain, transparency that satisfies auditors and builds trust.

Think of it this way. The AI model is the engine. Agentic context is everything else – the fuel, the roads and the map. In ERP, agentic context is the difference between an agent that accelerates operations and one that introduces risk at scale. That relationship, more than any performance benchmark, will decide who comes out ahead.

***About Ken Fischer***
*Ken Fischer is the CEO of Atigro, the proven ERP transformation firm that pairs its modular augmentation capabilities with AI-native frameworks. Atigro's experience and capabilities generate the rapid development and provisioning of new enterprise software functionality that meets dynamically changing business processes.*




*Article by Ken Fischer*

appficiency

## Johnny Than is the Founder & CEO of *Appficiency*

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The collapse of the design to build cycle will create more customization, not less:  I distinctly remember at the Traction conference in 2022, *Oji Udezue* (Head of product at Twitter and formerly Atlassian) mention that an enterprise was nothing but a series of workflows and that a workflow was data being handed off between humans for an eventual end point. In software to date, there have been two competing forces on workflows; one was the workflow that was already built to be 'best practice' and how well a corporation could adopt or adapt to that ideal workflow; two was software being modified to fit the desired workflow for the corporation so that it became a part of the unique value of the enterprise. These two competing forces can come together with AI but they can also separate two companies in the same industry, ultimately creating an acceleration of difference between winning and losing in the same field. A simple example is a company that manufactures or builds unique living spaces that previously could not compete with pre-fab can now compress that time and cost to get very close to a pre-fab price ...which company wins the market then?

"



***About Johnny Than***

Johnny Than is the Founder & CEO of Appficiency, a global IT consulting firm providing enterprise digital services to manufacturing firms. With 18 years of manufacturing technology experience, including 7 years at Oracle helping transform NetSuite's manufacturing capabilities from distribution-focused to a comprehensive manufacturing platform, Johnny has implemented systems for Fortune 500 manufacturers and global mid-market to enterprise companies. Appficiency's AI Enablement Consulting (AIEC) service helps manufacturers identify high-impact AI use cases and deploy solutions that unify fragmented systems for real-time operational visibility. For more information, please visit: https://appficiency.com/.




# SAP S/4HANA 2602: Three Misconceptions CIOs Can't Afford To Ignore

*SAP S/4HANA 2602 keeps coming up in CIO conversations right now, and not in a good way. It landed in February exclusively for Public Cloud ERP customers, and how SAP communicated it left the broader user community scrambling to work out what, if anything, applied to them.*

The answer, for most, was very little, and that gap between expectation and reality is starting to show. *DSAG* and ASUG have both been explicit about the confusion, with long-term SAP customers reporting they feel blindsided. Meanwhile, a *Freeform Dynamics survey* found 84% are apprehensive about SAP's current direction, with more than 90% worried about unpredictable pricing over time.

Three misconceptions in particular keep coming up, and the planning decisions being made on the back of them will be difficult and expensive to unpick.

**Misconception one: S/4HANA 2602 is the next version of S/4HANA**

SAP delivered 2602 exclusively to customers on its Public Cloud ERP platform. On-premises customers and those in the middle of private cloud transformations will not receive it. It is an incremental update for a specific deployment model, not the next iteration of the broader S/4HANA product line. Private Cloud customers, for reference, are still on the S/4HANA 2025 release cycle, which runs on the same development track as on premises.

The problem is with the naming. SAP's versioning has always implied universality, so many customers are reading 2602 as the logical successor to whatever they are currently running. That misread leads directly to misaligned roadmaps, premature upgrade expectations and budget conversations built on faulty foundations. I've seen it happen.



*Article by*
James Harvey,
EMEA CTO,
Rimini Street

Rimini Street®

*Article by James Harvey*

**Misconception two: Public Cloud is simply the SaaS version of everything in S/4HANA**

SAP Public Cloud ERP is a standardised, cloud-native platform built around the clean core philosophy. That means accepting significant constraints on customisation and conforming to SAP's standard processes. It is not a SaaS version of everything in the full S/4HANA suite. The functional scope is deliberately narrower, the extensibility model is different, and the upgrade cadence does not map to what on-premises customers expect.

For enterprises running heavily customised on-premises environments, this is not a drop-in replacement. Organisations that treat it as one tend to significantly underestimate the complexity of migration and overestimate the capabilities they will carry over to the other side. That is where programmes start haemorrhaging time and money.

**Misconception three: All Cloud ERP customers get the same functionality**

This is perhaps the most operationally damaging misconception, and the one SAP does the least to correct in its public communications. Public Cloud customers, Private Cloud customers, and those running on hyperscaler infrastructure do not all have access to the same capabilities, release cadence or roadmap commitments.

SAP is reportedly investing more than $23 billion in its EU sovereign cloud buildout, and that headline number is doing a lot of work in boardroom conversations. But the gap is significant and growing between what SAP is investing in at a platform level and what any given customer can actually access. Enterprises are making cloud commitments without a clear picture of which tier of functionality they are buying into, and that accountability lands on IT leadership when the business expects to see the innovations SAP has been promoting.

> "The question for CIOs is no longer whether SAP's direction is right for them. It is whether their organization has the resources and appetite to follow it, on SAP's terms and timetable, or whether a different conversation is now warranted about how to protect stability, control costs and retain the ability to innovate without being locked into a single vendor's roadmap decisions."

**The strategic signal beneath the release**

With 2602, SAP has made its priorities visible. The AI features, the release cadence and the roadmap commitments are all going to Public Cloud customers. On-premises and Private Cloud customers are not getting the same things and the pace of that divergence is accelerating. Right now, too many organisations are piecing that together from missed roadmap commitments and excluded releases rather than hearing it plainly from SAP.

The question for CIOs is no longer whether SAP's direction is right for them. It is whether their organisation has the resources and appetite to follow it, on SAP's terms and timetable, or whether a different conversation is now warranted about how to protect stability, control costs and retain the ability to innovate without being locked into a single vendor's roadmap decisions.

**The takeaway**

For many enterprises, the question now is whether SAP's direction is one they have chosen or one that is being chosen for them. Getting that answer right and acting on it before decisions are made, by default rather than by design, is one of the more consequential calls CIOs will face in the next few years.

Rimini Street®


***About James Harwey***

*James Harvey is Theater CTO, EMEA at Rimini Street, where he advises enterprise clients on strategic innovation and long-term technology roadmaps across IT, security, and ERP. With 25 years of experience spanning banking, energy, retail, and technology, he has held senior leadership roles at Cisco, Royal Bank of Scotland, ABN AMRO Bank, New Look, and BP.*







# Beyond the Keyword: Elevating Enterprise Procurement with Hybrid Vector Search

**The Illusion of Intelligent Procurement**

Enterprise procurement is often bottlenecked not by a lack of inventory, but by the rigidity of the search experience. Employees know exactly what they need to accomplish their tasks, but they rarely know the specific part numbers, brand restrictions, or standard corporate nomenclature.

When organizations attempt to modernize legacy ERP portals by simply bolting on Generative AI (GenAI) chatbots, they quickly fall into the "AI Trap." Large Language Models (LLMs) are brilliant at conversational UX and semantic understanding, but they are prone to hallucinations. They are designed to predict text, not to calculate real-time warehouse balances or enforce strict multi-org security rules.

Imagine an engineering manager requesting a "15-inch mobile workstation with maximum RAM for heavy CAD rendering." A naive AI search might prioritize a standard 16GB office laptop simply because the word "Standard" aligns closer to the "Enterprise" context in its multi-dimensional space, completely ignoring the strict hardware requirement. The result? Frustrated users, incorrect hardware deployments, and a procurement cycle that requires manual intervention.

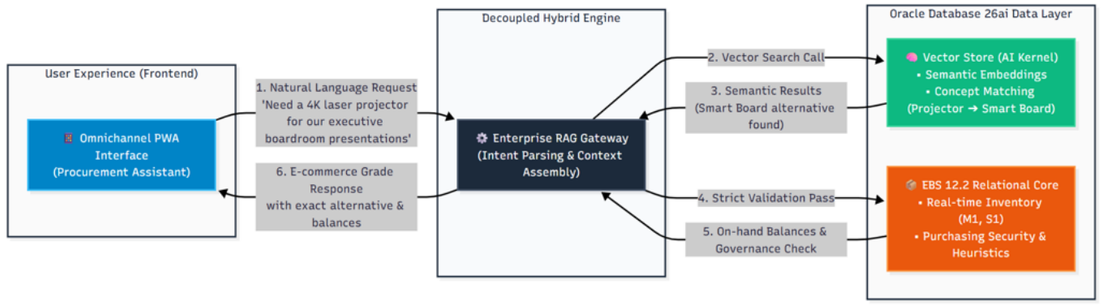
**The Solution: A Hybrid AI Engine**

To build a truly intelligent procurement catalog, the system must bridge the gap between GenAI's natural language fluency and strict database logic. The solution is an Enterprise RAG (Retrieval-Augmented Generation) architecture. It pairs the cognitive intent-parsing of GenAI with the strict determinism of Hybrid Vector Search.




*Article by*
Dmitry Borisov,
Oracle Solution Architect,
Oracle ACE
ORACLE E-BUSINESS SUITE


*Article by Dmitry Borisov*



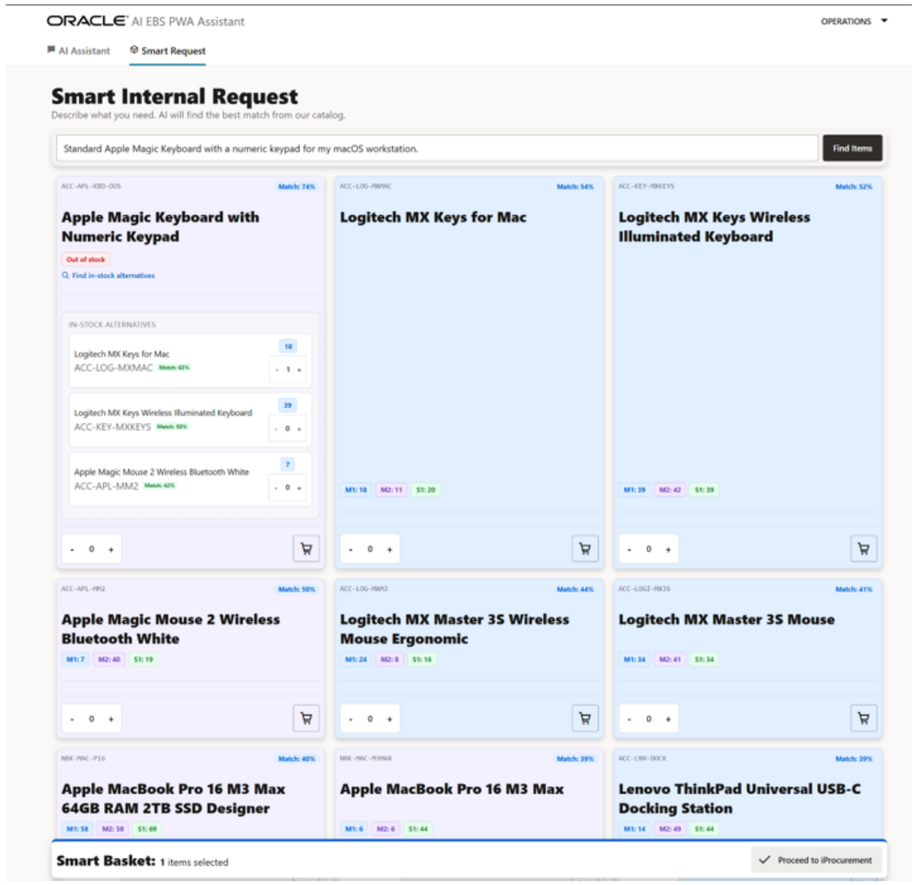

*Decoupled RAG Architecture for Enterprise Procurement.*

To demonstrate this in practice, an intelligent Progressive Web App (PWA) layer was engineered over Oracle E-Business Suite (EBS), utilizing the native AI Vector Search capabilities of the Oracle 26ai database.

This architecture introduces four high-impact workflows:

**1. Proactive Semantic Discovery: Breaking Down Brand Silos**

In a traditional ERP portal, searching for a specific brand often yields a blank page if the item is out of stock or not supplied. Users are forced to guess alternative keywords.
This hybrid engine changes the paradigm by understanding the functional intent behind a query. If a user searches for an “Apple Magic Keyboard,” the system doesn’t just look for the word “Apple.” The vector model recognizes the underlying semantic cluster: a premium, wireless, macOS-compatible keyboard.



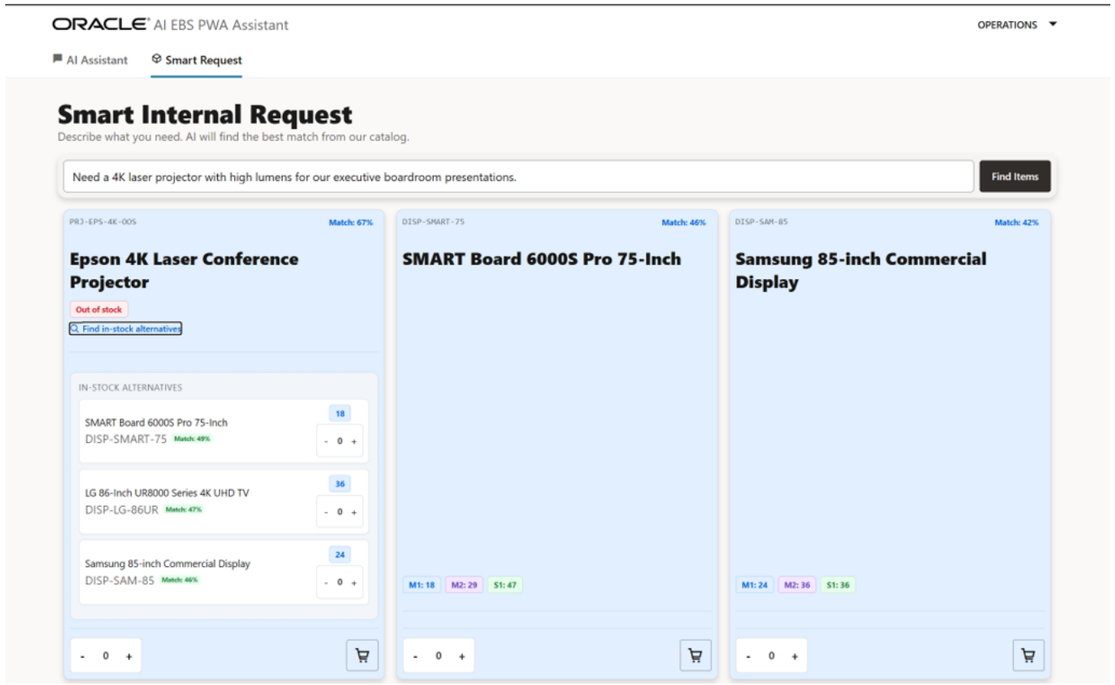

*Search for Apple Keyboard showing Logitech MX Keys as a high-match alternative in the main results*

As a result, it proactively presents high-quality alternatives, such as the Logitech MX Keys for Mac, directly in the main search results. The system anticipates the ultimate goal, bridging the gap between brand loyalty and actual warehouse availability.

**2. Smart Substitution: The “Out of Stock” Killer**

Even with proactive discovery, enterprise procurement often requires strict adherence to specific part numbers. When a required item—like a specific 4K boardroom projector—is flagged as “Out of stock,” the process usually grinds to a halt.

To resolve this, the architecture introduces a Smart Substitution workflow. Directly within the item card, users are presented with a “Find in-stock alternatives” action. With a single click, the system executes a localized semantic search against available inventory.




*Epson Projector “Out of stock” with the expanded Smart Substitution panel showing a curated spectrum of functional equivalents: an interactive SMART Board, an LG UHD TV, and a Samsung Commercial Display*

**Architectural Insight: Dynamic Vector Context**

Notice the dynamic nature of the vector match percentages. The main search grid utilizes a Text-to-Item embedding to match the user’s natural language prompt. However, when a user clicks ‘Find in-stock alternatives’, the engine seamlessly switches to an Item-to-Item semantic similarity search. It uses the vector of the unavailable item itself as the anchor, recalculating distances to guarantee the closest functional hardware replacement rather than just matching the initial keywords.

How it delivers business value:

• ***Contextual Accuracy:***
It understands that the ultimate goal is “large-format boardroom presentations.” Instead of failing when exact projector models are unavailable, it instantly curates a diverse spectrum of functional equivalents—offering an interactive SMART Board, a large-format UHD TV, and a Commercial Display.

• ***Zero API Latency & Cost:***
Unlike naive AI implementations that constantly query external Large Language Models, this architecture leverages pre-calculated vector embeddings stored natively within the database. Finding an alternative is a pure mathematical operation inside Oracle 26ai. It happens in milliseconds and consumes zero external API tokens.

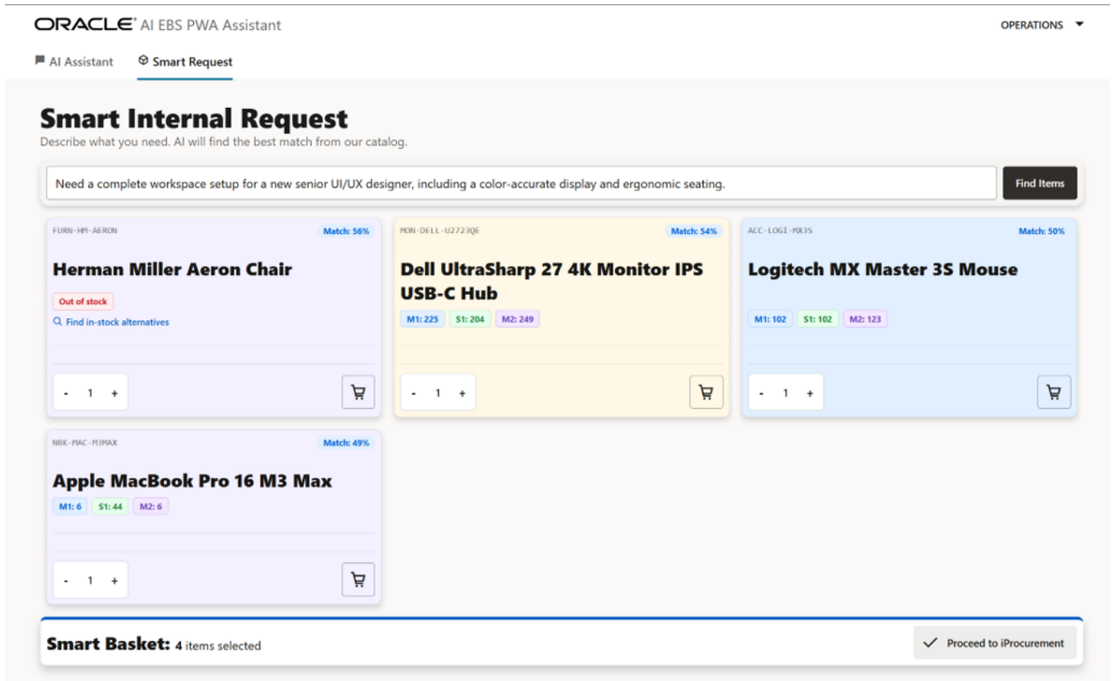
*Article by Dmitry Borisov*

**3. Contextual Workspace Assembly: Thinking in Roles, Not SKUs**

When HR or IT departments onboard a new employee, they don't think in individual part numbers; they think in functional roles. Traditionally, requesting a complete setup requires searching through four or five different catalog categories (Laptops, Monitors, Peripherals, Furniture), which is time-consuming and prone to compatibility errors.

Here, the synergy of GenAI and Vector Search shines. A GenAI model instantly parses the natural language prompt, breaking it down into distinct hardware requirements. Simultaneously, the native vector engine executes localized searches against available inventory to find the exact, in-stock SKUs that match those requirements. By design, this workflow curates a complete, role-specific bundle in milliseconds, reducing the onboarding procurement process from hours of manual catalog browsing to a single query.

Even if a specific item within the bundle is marked as 'Out of stock' (like the Aeron chair), the system allows the user to proceed with the internal requisition. This seamlessly triggers a standard PR-to-PO flow or an Internal Order (IO) in the backend, maintaining the user's workflow without disruption.



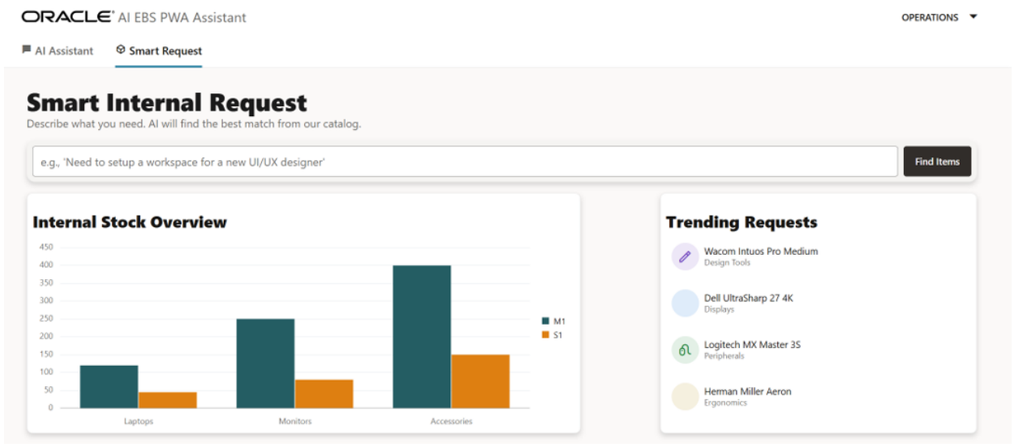

*The search result showing the MacBook Pro M3 Max, Dell UltraSharp 27 4K Monitor, Logitech MX Master 3S, and Herman Miller Aeron chair all in one view*

**4. The Zero-State Experience: Predictive & Trending Procurement**

In the consumer e-commerce world, the best search experience often happens before a single letter is typed. This philosophy translates seamlessly into the Enterprise ERP environment.

Upon opening the procurement PWA, users aren't just faced with an empty search bar; they are greeted with a dynamic "Trending" section. By analyzing historical procurement data, departmental patterns, and request frequencies within Oracle 26ai, the system proactively surfaces high-turnover items.






*PWA dashboard showing a sleek "Trending Requests" carousel featuring premium design tablets, ergonomic seating, and office monitors, prior to any search query*

This completely eliminates friction for routine requests. If the data shows that 80% of new hires need the same standard-issue IT accessories, the system ensures those items are exactly one click away. It transforms a tedious catalog search into a simple, single-click confirmation.

**Consumer-Grade UX in an Enterprise Reality**

The best AI engine is useless if buried in a clunky interface. By wrapping this hybrid architecture in a modern PWA, the experience becomes frictionless.

When a user clicks to find an alternative, they aren't redirected to a complex filtering screen. The semantic matches expand smoothly inline. Users see the match percentage, real-time multi-org warehouse balances (e.g., across M1 and S1 facilities), and can adjust quantities using a custom stepper—all without losing their context. It's an e-commerce-grade experience built on top of a robust ERP foundation.

**Modernize, Don't Replace**

Ripping and replacing an established ERP system is a multi-year, high-risk endeavor. But the user experience and procurement efficiency do not have to remain trapped in the past. By layering a Hybrid RAG architecture over an existing enterprise ecosystem, organizations can unlock a consumer-grade, intelligent procurement experience in a fraction of the time. The intelligence is already hidden within the Master Data—it simply needs the right engine to surface it.

It's time to move past manual catalog browsing and failed exact-match searches. It's time to empower the workforce with systems that understand their intent, not just their keystrokes.

For IT and business leaders exploring ways to modernize an Oracle EBS architecture or experimenting with native vectors in Oracle 26ai, bridging the gap between semantic AI and strict enterprise heuristics is the next critical step.

***Disclaimer:*** *The architectural patterns, SQL queries, and AI integrations described in this article were developed and tested exclusively within the official Oracle E-Business Suite Vision demonstration environment and Oracle Database Free/Developer editions. These environments are strictly intended for educational, prototyping, and Proof-of-Concept (PoC) purposes. No production systems, commercial instances, or real proprietary business data were used, modified, or exposed during this research. Furthermore, the architectural concepts and views expressed in this article are solely my own, developed independently in my capacity as an Oracle ACE. They do not represent the commercial products, proprietary R&D, intellectual property, or strategies of any current or former employer.*

***About Dmitry Borisov***

*Dmitry Borisov is an Oracle Solution Architect and recognized Oracle ACE Associate specializing in enterprise system modernization. As a leading industry expert, he pioneers the integration of Hybrid Vector Search, Generative AI, and Progressive Web Apps (PWA) into established enterprise ecosystems. His architectural methodologies enable large-scale organizations to achieve consumer-grade digital transformation without the high risk of replacing their core ERP foundations.*

*Article by Dmitry Borisov*

avidxchange

## Michael Praeger, CEO and Co-Founder, *AvidXchange*

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AI has the potential to transform enterprise workflows by reducing friction, accelerating decision-making, and helping teams work more effectively across ERP systems. But the most successful organizations will treat AI as a collaborator, not a replacement for human expertise. As AI becomes embedded in ERP platforms and business operations, maintaining the right balance between automation and human judgment will be critical to driving productivity, improving customer outcomes, and building trust in the decisions organizations make.

"



***About Michael Praeger***

Michael Praeger is Co-Founder and Chief Executive Officer of AvidXchange, a leading provider in accounts payable (AP) automation, offering intelligent AP software and payment solutions specifically designed for mid-market businesses and their suppliers. Since co-founding the company more than 25 years ago, he has led its growth to serve more than 1,500 teammates, 8,000+ customers nationwide, and 1.5 million suppliers nationwide.

A recognized expert in fintech, payments innovation, entrepreneurship, and leadership, Michael is a frequent industry speaker and commentator on the future of business technology. Prior to AvidXchange, he co-founded several technology companies, including PlanetResume.com and InfoLink Partners, and worked with venture capital firm Summit Partners. Michael holds a B.S.B.A. in Finance from Georgetown University and is a graduate of MIT's Birthing of Giants executive entrepreneurship program.




# How to Make Your Life Easier with ERP Scheduling

*De-Stressing the most stressful job in the enterprise environment*

**Ask Anyone In A Manufacturing Or Project-Driven Company Who Has The Most Difficult Job And Without Hesitation They Will Tell You: The Scheduler/Planner**

It's no wonder. Foolproof scheduling is critical to the smooth operation of most companies. Yet, planning and scheduling the workflow is like trying to juggle 150 different balls all at once. Only the balls are all different shapes and sizes, some move faster or slower than others, and while you're juggling, other people are constantly pulling some of the balls out of the air and throwing new ones at you. Keeping track of all the different orders, managing all the different tasks and work processes, and meeting all the due dates, change orders and everything else the customer throws at you is truly a Herculean task.

It's not surprising that many schedulers work 60 to 70-hour weeks and still feel like they need another 20 or 30 hours to get the job done.

At the same time, the job scheduling function has a huge impact on productivity and profitability. It also impacts the customer relationships your company depends on. Your ability to manage limited resources, satisfy customer demands and respond to the ever-changing conditions on the shop floor determines, to a large degree, whether individual orders and the company as a whole make or lose money.

*Article by Dusty Alexander*



*Article by*
Dusty Alexander,
CEO and President,
Global Shop Solutions

Global Shop SOLUTIONS ERP SOFTWARE

> “Every time you pull a job in progress out of a machine, you’re making a decision to lose money on that job.”

For example, how many times have you gone in and pulled a job before it is completed in order to react to another, more urgent customer order? You know that prematurely pulling jobs will significantly impact the flow of work currently on the shop floor. Plus, you have no idea how it will affect future orders that may be scheduled days or weeks out. Yet, you do it anyway because the customer is screaming and you were late on their last two jobs and you can’t afford to lose their business. The resource relationships are too complex to be accurately accounted for with “gut feeling” guesses.

We all want to keep our customers happy. But the fact is, every time you pull a job in progress, you’re making a decision to lose money on that job. The job was in there for a good reason, and making a reactionary decision not only means that the job that got pulled will be late, but within the next few days, the customer whose job got bumped will be calling and demanding that you expedite the job. Chances are you will have to pull another job to get it back in the queue, which only leads to another round of headaches and potentially bad decisions. Moreover, unless you practice lean-setup procedures, you have now doubled your setup time, lost several hours of production time on that machine, and increased the probability of higher scrap and rework.

Most companies try to solve these kinds of problems by hiring more schedulers to manage the chaos. But all that does is increase overhead costs, add to the complexity of the scheduling process, and increases the number of schedules. Fortunately, there is an easier, better and much more cost-effective way.

**Makes Life Much Easier**

Enterprise Resource Planning (Erp) Software Is Specifically Designed To Automate, Simplify, And Reduce The Stress Of Scheduling Work Orders In A Busy Manufacturing Environment.

ERP software serves as a highly-sophisticated central communication hub for all the activities in a manufacturing business. It consists of *different modules* that handle everything from estimating to job scheduling to final delivery and billing, as well as the financial aspects of work generation, purchasing, inventory management, administrative overhead, and all the accounting and financial activities. The end result is a software system that integrates all the essential activities of the business into one nice, neat electronic package.

The benefits of using ERP software include faster cycle times, better on-time delivery rates, reduced administrative overhead, lower labor and materials costs, improved productivity and more. ERP also enables companies to manage the numbers in realtime (instead of at the end of the month or quarter), so that management can make better decisions for the long term. When properly implemented, ERP acts like a company-wide, ongoing process improvement tool that empowers the entire organization to become leaner, more efficient and more profitable.

**What Does This Mean For You, The Scheduler?**

At its core, your job involves making decisions. And not just one or two decisions, but hundreds of them every day that determine the flow of work on the shop floor. Ultimately, your decisions determine whether the job gets done on time and whether you end up with a happy or a disgruntled customer. The difficulty lies in the fact that so many variables go into each decision: the number of machines, part attributes, employee availability, employee skill set, the capacity of each machine, the work order, the due date, the number of jobs currently on the shop floor, and on and on. With large, complex jobs, the decision criteria can extend ad infinitum, until it seems like they are almost completely unmanageable.

ERP software, and in particular the *scheduling module*, simplifies the decision-making process by making most of the decisions for you. By doing so, it allows you to manage the entire job-scheduling process faster, more efficiently and more effectively. With ERP scheduling, work orders that used to take hours and even days can be completed in a matter of minutes, freeing you to spend more time on the shop floor reacting to all the situations that typically come up in the course of a normal day.



> “ERP software simplifies the decision-making process by making most of the decisions for you.”

Through a variety of features and functions, scheduling evolves from a hair-pulling exercise in frustration into a simplified, low-stress process that efficiently and effectively guides and directs all the activities that need to occur on the shop floor.

**The Most Important Of These Features And Functions Include:**

- ***Automated scheduling.***

Scheduling with ERP is completely automated. Once all the job and machine data has been entered into the router or project and other modules, the system automatically schedules the jobs for you. Simply enter a work order, click on a few buttons and the system instantly schedules the job. Jobs that used to take all day to schedule can now be done in seconds.

- ***Improved accuracy.***

Because ERP tracks what you’re making, how you’re making it, how many you’re making, and work in progress at any given moment, the system allows you to say exactly when the job will be done. With ERP, “safe” dates are a thing of the past, as you can tell customers an exact due date. On the sales side, this accuracy also allows for precise promise-date generation.

- ***Improved visibility.***

Perhaps the hardest part of manual scheduling is tracking down all the information needed to make decisions about when and where to schedule jobs. ERP gives you complete visibility by storing all the data in one central location. Every piece of information about every job - from work order number to completion due date - is instantly available to you in a variety of formats. In addition, you can search the data using a wide variety of criteria such as work order number, part number, project number or customer.

- ***Amazing flexibility.***

ERP delivers amazing flexibility to manage everything from individual work orders to every project in the entire system. For example, you can balance your load across resources by instantly identifying which resources have excess capacity or excess load. You can modify the labor default schedule, including interjecting holiday calendars or schedules. You can easily create work groups and assign alternate workcenters for a resource. Best of all, most changes, whether big or small, are made with only a few clicks of the mouse.

- ***Fewer bottlenecks.***

A major source of frustration with manual planning occurs when multiple jobs get stacked on top of each other due to limited capacity. ERP reduces and, in many cases, eliminates these bottlenecks by making it easy to schedule the right job on the right machine at the right time. You can also reschedule a job at any point in the system and, with just a few clicks of the mouse, instantly see how that rescheduling affects every other job in the system.

- ***Reduced costs.***

Customers often order the same item to be delivered at different times. ERP allows you to significantly reduce setup time by scheduling multiple jobs of the same item to run concurrently, rather than running them days or weeks apart, as is often the case with manual scheduling.

Ultimately, ERP scheduling allows you to stop juggling all the balls because the system juggles them for you, performing in a few seconds what used to take hours or even days to accomplish. Now, instead of struggling to get your jobs in the right order, you can spend the bulk of your time and energy responding to and managing the events that take place out on the shop floor.

By freeing up your time, ERP scheduling allows you to make better decisions and become more of a proactive manager of people and resources. It redefines your role, elevating it to a more strategic position and increasing your value to the company.

**How ERP Scheduling Works**

The ERP scheduling module is a sophisticated tool that allows the planner to efficiently and effectively manage the entire job-scheduling process from the moment the order comes in the door until the part or project is completed and shipped off to the customer.

The schedule can be completely automated or can require minimal input. The system tells you what parts need to go on which machines and when, how much material is required, whether that

*Article by Dusty Alexander*

material is in stock or needs to be ordered, employee availability and constraints, and any other task that needs to be performed for that specific job.

More importantly, the ERP scheduling module allows you to track everything you need to know about every job or project in the system from beginning to end, including labor costs, machine efficiency, setup and run times, work in progress and on-time completion rates. In fact, everything you used to do on multiple spreadsheets, whiteboards or in your head is now handled instantly and error-free by the ERP system. As a result, you can now spend more time managing events as they occur on the shop floor and less time stuck in your office trying to unblock the latest bottleneck or miscommunication.

But the real power of the ERP scheduling module lies not so much in what it does for you (automatically schedule jobs) as in what it enables you to do by providing instant access to critical information in a variety of formats.

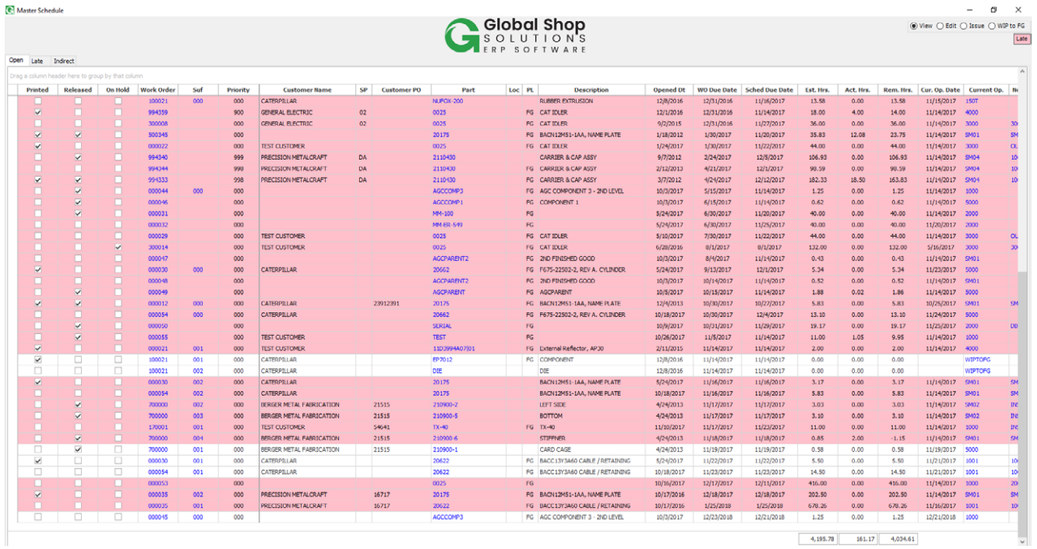
Perhaps the best way to understand this amazing power and flexibility is by looking at a few screenshots from Global Shop Solutions' Advanced Planning and Scheduling (APS) module.

Most scheduling modules consist of five to seven primary functions that track and manage every aspect of the scheduling process. In Global Shop Solutions ERP software, primary functions consist of scheduling, reporting, interface, maintenance, and service. Within each of these functions, which are listed as drop-down menus on the main scheduling screen, are dozens of menu selections that allow the scheduler to perform all the essential tasks required to schedule and manage a busy shop floor.

Global Shop Solutions' Advanced Planning and Scheduling (APS)

### 1.1 MAIN APS SCREEN

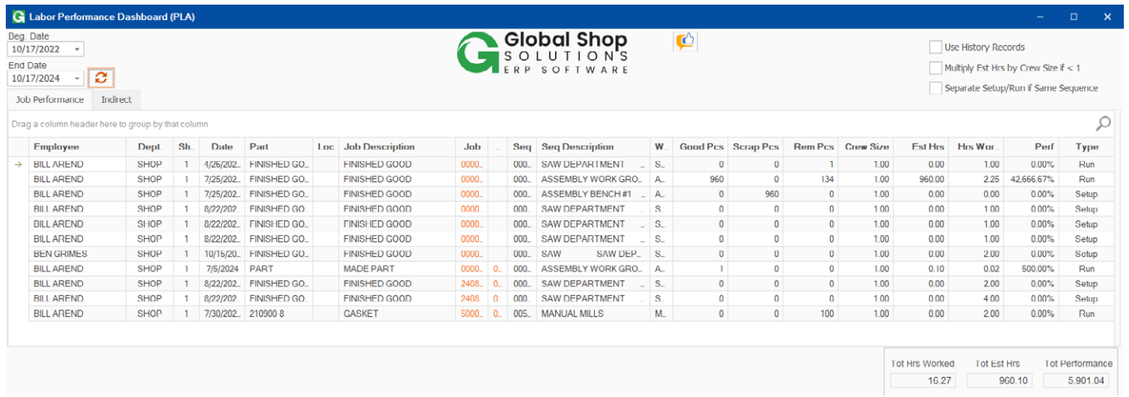
Here we have the main screen for Global Shop Solutions' APS module. Listed on the menu bar along the top are the primary functions of scheduling, reporting, interface, maintenance, and service. To the right is the Master Menu, which consists of a list of icons that give the scheduler instant access to the most frequently used functions. These include:




- **Job** – View detail on each job
- **BOM** – View multi-level work orders
- **Project** – Allows you to view all detail on a project, as well as link relationships
- **Plant** – Drill into plant/department/ work center loading
- **Master Job Schedule** – See all work orders in date order
- **Master Part Schedule** – See all work orders, grouped by part number
- **Master Customer Schedule** – Review work orders grouped by customer
- **Master WC/WG** – Look at efficiency by job/ machine over time, or sequential workcenter/ work group dispatch
- **Work Groups –** Shows loading by machine in work group view and displays attribute matrices
- **Employee** – Constraint management of employees
- **Calendars** – Easily define a workcenter's capacity and can be viewed by workcenter and employee

Now, let's drill down into the "Scheduling" menu to see some of the many scheduling functions this module performs.

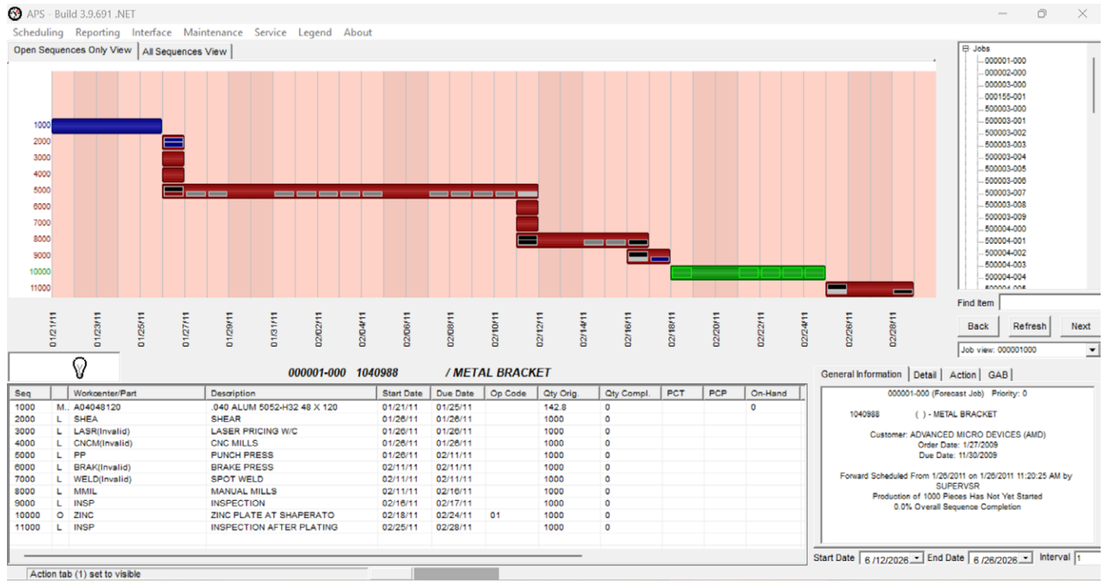
### 1.2 MAIN SCREEN SCHEDULING MENU




Here we can see all the bulk scheduling methodologies that the module can perform. You can schedule using default scheduling directions. You can even try out different scheduling options (using the "Shift to What-If Scenario" menu selection) before entering them into the system.

One of main benefits of Global Shop Solutions' APS module is the ability to quickly access information at whatever level of detail is needed. For example, suppose a customer calls or emails and wants to check the status of a job. The "Individual Job View" screen tells you everything you need to know about that job. Or, what if an employee doesn't show up, or a machine breaks down. You see the impact immediately.

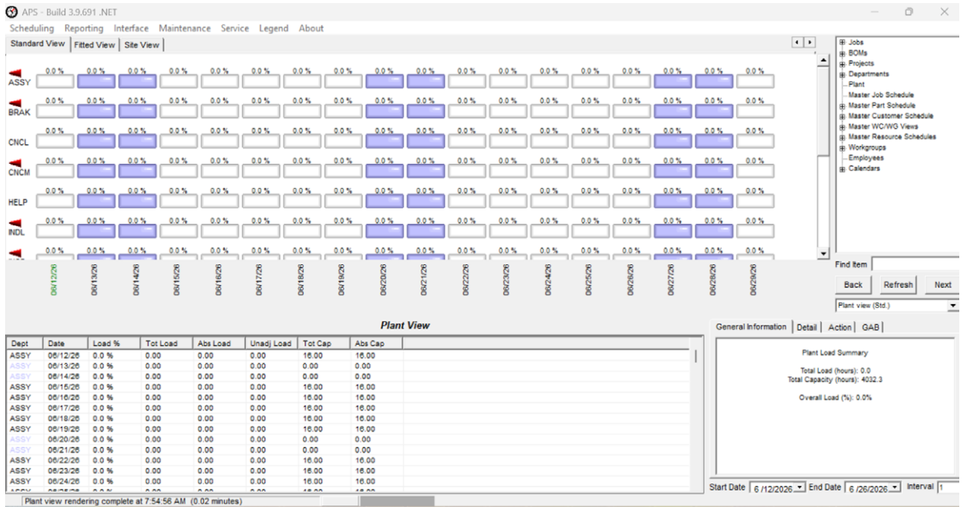
### 1.3 INDIVIDUAL JOB VIEW




*Article by Dusty Alexander*

The horizontal bars on the large graph show the material sequence (blue), employee or machine labor (red) and outside service sequence (green). The vertical bars indicate whether the job in on time (light blue) or late (pink). The box at the bottom gives a listing of the work order's sequences, and the options in the lower right-hand corner allow you to reschedule the jobs if necessary. Each bar, color or line of text can be clicked on to drill down for more specific information about that aspect of the job.

Suppose that before scheduling a certain job, you want to get a big picture view of the workload of each department on the shop floor. Again, this information is only a mouse click away.




Using a color-coded scheme, this screen illustrates the workload by various department. Red blocks mean that a department is overloaded on that particular date. Green blocks mean the department is scheduled under capacity, and yellow means it is scheduled at 100 percent capacity. Blue dates represent weekends or holidays. The box on the lower left provides the same information in list format, while the box on the lower right provides summary information and allows you to change the dates for the information being presented.

These screenshots represent just a few of the many ways you can access the data in Global Shop Solutions' APS module. With such detail at your fingertips, you can easily manage jobs and projects more effectively, respond to customer inquiries and maximize resource utilization.

**Must-Have Macro Features**

Keep in mind that no two ERP products are exactly alike, and their scheduling modules can vary widely in their features, functions and effectiveness. The best ERP systems come with a very robust scheduling module that includes the following macro features:

- ***One-time data entry.*** When you enter data for a new work order or project, the system automatically makes changes to the entire system.

- ***Single screen simplicity.*** In many ERP software systems, making a change on a work order or project requires accessing multiple screens. The best programs allow you to adjust your schedule in one screen and see the results of that one rescheduling throughout the system.

- ***Multiple sorting capabilities.*** The best scheduling modules allow you to view, sort, manipulate and report on the data according to multiple criteria. The system should allow you to see the data graphically and in list view.

- ***Simple rescheduling.*** The scheduling module should not only allow you to reschedule a job with just a few mouse clicks, it should also show you how that reschedule affects everything else in the system.

- ***"What-if" planning.*** Suppose you want to see the impact of a potential job change without actually making the change to the system? The "what-if" planning feature allows you to enter any number of scenarios to see the potential impact without actually changing the jobs currently in the system.

- ***Finite scheduling.*** This important feature helps the planner identify and deal with bottlenecks and backups when available work outstrips resource capacity.

- ***Schedule visualization.*** This is perhaps the most powerful feature in the entire scheduling module. By displaying the data in various graphic formats, this feature gives the planner unprecedented ability to determine what is really happening on the shop floor and plan accordingly.

Every company is different, and certain features and functions that are critical to one company may be less important than others. When evaluating ERP software for your business, be sure to identify the areas that cause you the most scheduling/planning problems and make sure the software comes with the features and functionality that will allow you to properly manage those areas.

> "Keep in mind that no two ERP products are exactly alike."

**Graphic Scheduling: Power in Your Hands**

It's not what graphic scheduling allows you to see that makes it so valuable; it's all that it enables you to do. More than any other feature in the ERP scheduling module, graphic scheduling enables you to make timely decisions that cut costs, increase productivity and enhance customer relationships.

For example, suppose a customer calls in with a rush job that requires you to reschedule several other jobs. After you finish rescheduling, graphic scheduling pops up a "bump list," which says, "Based on the transactions you just made, we have taken all these work orders and moved them out to the right. You




*Article by Dusty Alexander*

will be late on these orders if you continue with this decision." The bump list tells you how many days each job will be moved out so that you can look at the effects your rescheduling will have on that job and make any necessary decisions. Figuring that out with manual scheduling would take hours, if not days.

As with the finite scheduling window, not all ERP systems come with graphic scheduling. So when evaluating any ERP software, spend extra time test-driving the graphic scheduling feature to ensure that it has all the features and functions you need.

**Ultimate Visibility**

ERP scheduling gives the scheduler/planner the one thing he or she needs to perform the job at maximum effectiveness: visibility. Without it, you're at the mercy of a multitude of different variables beyond your control.

Suppose a customer calls up and says, "This is Joe from A-1 Metals. Where is my order? I need it quicker than originally promised."

**ERP Scheduling Gives You Unprecedented Control Over Your Job And Your Environment.**

With manual scheduling, you have to get out of your chair, walk onto the factory floor, track down the job foreman and ask if that order is running. If so, you have to determine when it will be done, which involves looking at the router and manually scanning the schedule of every machine and process involved. If conflicts exist on some of the machines, which they usually do, you have to make some very difficult decisions - do you take a job out of the machine because this one is more important? If so, you make one customer happy, but you have no way of knowing what will happen to the other jobs and their customers.

In contrast, ERP scheduling makes it easy to see cause and effect. Without ever leaving your office, you can click on the customer's job and instantly see the status, as well as the detail of raw materials, labor, etc. You can see how much material has been issued for the job and whether it is enough to make all the parts. If not, you can instantly determine how many parts you can make with the material that has been issued. You can also see how much material you have on hand and whether it is enough to complete the job.

You might decide to run that customer's job today and see how it affects all other jobs. Or you might tell the customer you can't get them out today, but you can get them out tomorrow. If so, you can instantly see how much capacity you have for each machine so that you're not just making an empty promise. The bottom line is that ERP scheduling gives you instant visibility for every aspect of every job in the system, so that you know exactly how any decision you make will affect other jobs and projects.

**Your Scheduling Job Easier to Control**

ERP scheduling makes your life as a scheduler easier in so many ways.

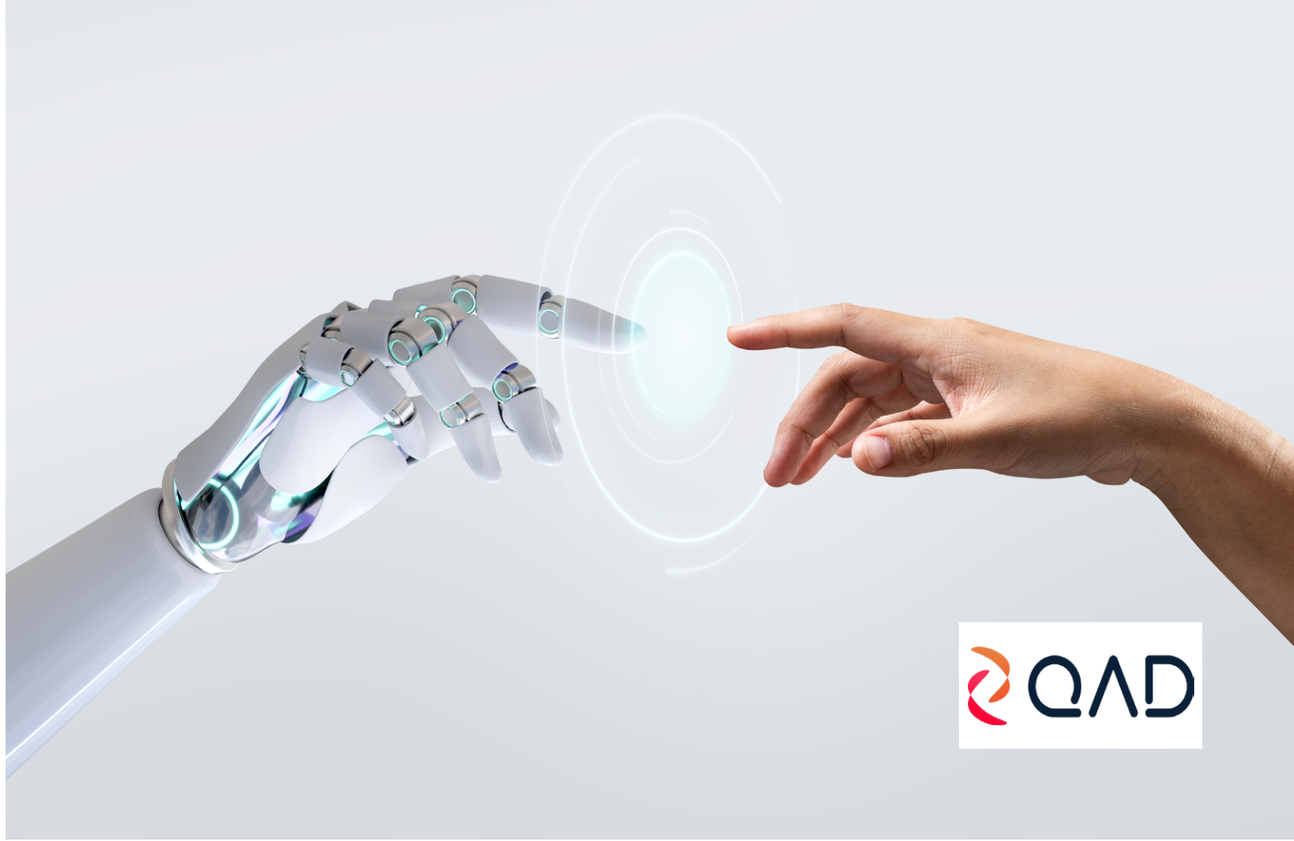
It dramatically reduces the time required to process a new work order and schedule a job. (In many cases, scheduling a job with ERP takes only a few moments.) It reduces the headaches of trying to track down important data that is stored in many different places. It allows you to view and manipulate the data in many different ways in order to achieve the most efficient and productive use of your equipment and labor resources. And it reduces, and in many cases eliminates, the frustrating bottlenecks that occur due to insufficient information, poor scheduling or simply being overwhelmed by the demands of the job.

Perhaps most important, ERP scheduling gives you realistic promise dates with unprecedented control over your job and your environment. Manual scheduling constantly puts you at the mercy of elements beyond your control – inadequate information, lack of visibility, last-minute changes and the overall complexity of the shop floor environment. ERP provides instant access to all the information you need to manage every job on the shop floor with as much precision, detail and accuracy as you want. Once you try it, you will wonder how you ever managed without it.

***About Dusty Alexander***

*Dusty Alexander is President and CEO of Global Shop Solutions. Since joining the company in 1990, he has played a leading role in Global Shop Solutions' new product development, with a special emphasis on customer-driven applications and customer success. Dusty has been instrumental in Global Shop Solutions' growth and development as an innovative leader in the ERP software industry. Under his direction, Global Shop Solutions has increased sales every year, and has grown into one of the largest privately-held, discrete manufacturing ERP software solutions companies in the United States. Dusty is actively involved in Global Shop Solutions customers' increased benefits derived from the software. Through his dedication, Global Shop Solutions has earned a reputation for outstanding customer service, superior training and highly successful product implementations.*






# The AI Race Has a Blind Spot and It's Living Inside Your ERP

*The conversations I'm having with manufacturers right now have a new urgency to them. Everyone is moving fast on AI. Budgets are open, pilots are running and the pressure to show results is real. The opportunity is enormous, and standing still is not an option.*

However, there is a question that I am not hearing nearly enough: Which AI? Whose AI? Where does it live inside my operations?

The hard truth is this: the rush to bolt third-party AI onto ERP systems is quietly creating some of the most dangerous vulnerabilities manufacturers have ever introduced into their own operations, and it's happening right now in plants around the world.

A recent independent analysis dove deep into exactly this risk. If you oversee operations, compliance or technology at a manufacturing organization, you need to read it. What follows is what I think every plant leader needs to take away from it.

**Shadow AI Is Shadow Analytics 2.0… Moving 10X Faster**

Remember the days of the Shadow IT crisis? When employees began to extract sensitive corporate data into uncontrolled spreadsheets and personal cloud applications because official systems were too slow and cumbersome? For years, we worked to clean up that



*Article by*
Nancy Majure,
Head of Product for
Adaptive ERP, QAD

*Article by Nancy Majure*

situation, and now we face the same risk with AI. This time, the potential for harm is dramatically greater.

The unsanctioned use of AI applications throughout manufacturing operations is spectacular. Employees are transmitting confidential information about processes, suppliers and financial operations to unapproved AI applications at an average rate of approximately 223 events per month for each enterprise.

This represents an effort to achieve rapid results, and is identical to the mechanism by which Shadow IT developed. Consequently, we will achieve the same ultimately disastrous results if we fail to take action to control this situation.

There is one important difference. AI applications will use the information that they receive in ways that are substantially more complex than the capabilities of a spreadsheet on a desktop computer. In effect, our proprietary information will be extracted by, and become the property of, a third-party AI application. The application will learn from and ultimately disclose the information in results provided to other individuals.

There will be no opportunity to recover or control access to the information; there is no "undo" button.

**Your Competitive Advantage May Have a Leak**

As someone who has spent their career in plant manufacturing and operations, I know how much institutional knowledge lives inside a manufacturing operation. It is not just in the machines, but also the logic of how those machines run. That knowledge is one of your greatest differentiators.

When an engineer pastes a proprietary database schema or a backend module into a free external AI tool for debugging, that model may retain the content for future training. When it does, your unique operational logic can become part of a public model and surface later in responses to your competitors.

This isn't a theoretical risk, either. It is happening today in plants that have no idea it is happening, and once that competitive edge is gone, it is gone permanently.

> "Manufacturers do not have to choose between AI and safety. They have to choose which AI. Native AI, built into the architecture of the ERP rather than bolted on top of it, is a fundamentally different proposition."

**The Compliance Time Bomb Is Ticking**

The regulatory environment right now is not forgiving, and I want to be specific about why it matters so much for manufacturers racing to add AI.

If you are in *food and beverage*, FSMA 204 enforcement is coming up fast. The FDA will be knocking on your door during a contamination event and require complete lot traceability records (every Key Data Element, every Critical Tracking Event, every transformation in the chain) within 24 hours. That is not a window for scrambling across fragmented systems.

If you are in *life sciences*, 21 CFR Part 11 requires electronic records and audit trails that are immutable and deterministic.

If you operate in Europe, GDPR Article 30 is watching how your AI agents handle personal data, where it goes and whether it crosses borders without compliant records.

Third-party AI tools were built for speed, not compliance. They frequently sit alongside the ERP rather than within it, which means the digital chain of accountability that regulators will demand is broken before you even knew it existed. The analysis calls this a compliance time bomb, and that framing is exactly right.

**Probabilistic AI Has No Business Making Deterministic Decisions**

My background in the business of manufacturing makes me especially skeptical of unvetted AI integrations and I think you should be, too.

ERP systems are built on one foundational principle: you put A in, you get B out, every single time. That determinism is what makes your financials auditable, your compliance defensible, and your production planning repeatable.

Third-party AI, on the other hand, is probabilistic. It gives you the most likely answer, which is a very different thing from the right answer.

Imagine an AI tool used for demand forecasting that hallucinates a massive spike in orders. Without a deterministic guardrail, that false signal triggers the automatic purchase of excess raw materials. Millions of dollars tied up in inventory you do not need. Reverse the scenario: a hallucinated demand drop cancels critical supplier orders and your customer commitments evaporate. If that error lives inside your cost rollups, you are looking at distorted financial statements that can take months to reconcile.

My rule of thumb: if you would not trust an unsupervised intern to execute your financial controls, you should not trust a third-party AI to do it either.

**Native AI Is Not a Nice-to-Have. It Is the Only Architecture That Works.**

Manufacturers do not have to choose between AI and safety. They have to choose which AI.

Native AI, built into the architecture of the ERP rather than bolted on top of it, is a fundamentally different proposition. Intelligence woven into the workflow maintains deterministic guardrails, keeps data inside the governed environment, and creates auditable, attributable records of every decision an AI agent makes. It also gives employees a sanctioned, secure alternative to the Shadow AI tools they are currently reaching for.

This is precisely the difference between a system of record and a system of action.

QAD | Redzone's *ChampionAI* is built to do exactly this. Embedded within *QAD Adaptive ERP* rather than layered on top of it, ChampionAI agents are designed to act, not just analyze. They are purpose-built for manufacturing, which means they carry the vertical depth and institutional knowledge that a generalist AI vendor cannot replicate.

ChampionAI also tackles the shadow AI problem head-on. Rather than leaving employees to reach for unvetted external tools, QAD | Redzone provides an Authorized AI Agent Library: pre-vetted, task-specific agents designed for the real roles inside a manufacturing operation, including scheduling, procurement and quality.

Employees get the speed and utility they are looking for, and the enterprise keeps its data, its IP and its audit trail.

Our AI Action Auditing framework (SEC-58) takes this further. Every action taken by any AI within the ERP is logged, attributed to a human chain of responsibility, and structured for regulatory forensics. That is what the regulatory environment is going to require, and manufacturers who build for it now will not be scrambling when the mandate arrives.

**The Winning Formula for Smart AI Use in Manufacturing**

Winning this decade is not about adopting the most AI tools. It is about building intelligence into the right places, with the right governance and accountability behind it. Start here:

- ***Map your AI footprint before you scale it.*** You cannot govern what you cannot see. Identify every AI tool being used across your organization, approved or not.
- ***Demand native, not bolt-on.*** Before any AI tool touches ERP data, ask whether it lives inside your governed environment or alongside it. That answer tells you everything about your compliance and IP risk.
- ***Build for the audit you will eventually face.*** Whether it is the FDA, a GDPR inquiry or a security forensics team, every AI-driven decision in your ERP needs to be traceable, explainable, and defensible. Design for that now, not later.

The analysis I referenced goes deep on the data, the regulatory specifics and the architectural risks manufacturers are navigating right now. Read it and share it with the people in your organization who need to hear it.

The manufacturers who move with purpose, not just speed, are the ones who will come out ahead.

*Article by Nancy Majure*

***About Nancy Majure***

*Nancy Majure is Head of Product for Adaptive ERP at QAD, where she drives the strategy and evolution of the company's flagship ERP platform. A manufacturing enthusiast with deep expertise in enterprise software, she is passionate about helping manufacturers navigate disruption and adapt to rapidly changing market conditions. Nancy is focused on bridging complex industrial requirements with agile, innovative technology, and ensuring ERP customers can respond to challenges and opportunities with speed and confidence.*

## Jeff Copper, President of *C&A Technology*

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AI has become a board-level priority, yet many initiatives fail because they lack structure, clear objectives, and organizational readiness. Successful AI programs generally follow two paths, Enterprise Transformation, using large-scale data, retrieval-augmented generation, and connected systems to drive strategic outcomes and Agentic AI at the employee level, eliminating repetitive administrative tasks and streamlining daily workflows. The greatest value comes from empowering employees to work more efficiently, reclaim time, reduce friction, and focus on higher-value activities.

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***About Jeff Copper***

Jeff Copper serves as President of C&A Technology LLC, leading the company's growth strategy, service delivery, customer success, and operational excellence initiatives. Since joining CAT, he has been instrumental in expanding the company's ERP consulting, managed services, and AI automation practices while strengthening client and partner relationships. Jeff oversees CAT's Oracle JD Edwards, SAP, and Acumatica Cloud ERP business practices and is committed to helping organizations leverage technology to improve performance, accelerate growth, and achieve lasting business value.



# AI Agents Don't Create Value: They Reveal What You Value

*Rethinking AI strategy, governance, and value creation*

Everyone is talking about AI's value—from generative AI to autonomous systems and intelligent agents. Most conversations focus on improving models or optimizing processes. While important, these discussions often overlook a more fundamental question: What do we mean by "value" in an AI-driven organization?

As enterprises scale AI adoption, they're no longer just automating decisions; they're scaling decision-making itself, making good decisions faster, more consistently, and across more people or teams. This shifts the conversation from "What can AI do?" to "What outcomes—and values—are we scaling through AI?"

In terms of value, AI agents act as a mirror for the enterprise, reflecting assumptions, priorities, trade-offs, and incentives. They don't just create value; they reveal what an organization truly values.



*Article by*
Helena Jochberger,
Vice-President, Global Lead,
Manufacturing and Consulting
CGI

*Article by Nancy Majure*

**AI agents as value amplifiers—not just automation tools**

AI agents are often positioned as tools to improve efficiency, reduce costs, or enhance performance. In practice, however, they do something far more consequential; they formalize trade-offs, encode priorities, and execute decisions at scale.

In complex enterprise environments, this distinction matters. AI agents don't remove complexity; they standardize how decisions are made within it. Every recommendation, escalation, approval, or automated action reflects assumptions about what matters most—speed, accuracy, risk reduction, customer experience, compliance, cost, or some combination of these.

This is why organizations need a more deliberate approach to AI strategy and governance. With human decision-making taking the lead, the goal is not only to ask whether AI agents work, but whether they are amplifying the right values, supporting the right outcomes, and making decisions in ways the organization can explain, trust, and improve.

Here are some recommendations for putting such an approach into practice.

***1. Define value explicitly: Purpose must be built into AI systems***

AI agents don't interpret vision statements; they execute objectives. It's important for organizations to define value clearly before embedding agents into operational workflows. In predictive maintenance, for example, an AI agent will behave differently depending on how cost- efficiency, system availability, safety, and reliability are defined and weighted. A cost-focused objective may delay maintenance; a safety-focused objective may trigger earlier intervention.

The same data and system can produce different outcomes. Purpose must be built into the objectives, constraints, thresholds, escalation paths, and governance mechanisms that guide agent behavior.

***2. Build trust by questioning everything***

As AI adoption scales, so does the risk of automating errors, bias, or misaligned decisions at speed. For safety-critical or mission-critical environments, trust can't be based on outputs alone. It must be engineered into the system through explainability of decisions, traceability of data and assumptions, and mechanisms to challenge and validate outcomes.

It's essential for organizations to understand why a recommendation was made, which assumptions shaped it, whether outputs remain aligned with objectives, and when humans or other systems can question, override, or escalate decisions. Value comes from informed trust, not blind automation.

***3. Align data, models, and real-world context***

AI agents operate on data patterns, not truth. This creates the risk of mistaking signals for reality: sensor data for actual system health, model predictions for physical conditions, simulations for real-world behavior, or historical patterns for current operational realities. In high-stakes environments, this misalignment can lead to costly or unsafe decisions.

Systems may learn from incomplete, outdated, or historically biased data and reinforce past assumptions rather than adapt to present conditions. To guard against this, strong data governance, validation, and continuous model monitoring are critical.

> "AI agents don't just create value; they reveal what an organization truly values."

***4. Balance autonomy with human oversight***

As autonomous systems advance, full automation can be tempting, but it's not always the optimal goal. In complex environments, the most effective model combines AI-driven scale and speed with human judgment and expertise.

AI agents can monitor systems, detect patterns, run scenarios, and respond quickly. Humans bring context, ethical reasoning, risk interpretation, and accountability. As autonomy increases, humans evolve from direct operators to designers of objectives, guardrails, governance frameworks, and escalation pathways. AI should extend human capability, not replace accountability.

(For more on this topic, I invite you to read our executive point of view, *Why the digital puzzle can't solve itself*, which underscores how, across industries, human judgment and human-centered technology are becoming the true differentiators in maximizing outcomes from AI.)

***5. Design for adoption: Optimize the human experience***

AI success shouldn't be measured by technical performance alone. A system can be accurate and sophisticated, but if it increases cognitive overload, reduces transparency, or erodes user trust, it will limit adoption and, ultimately, value realization.

Successful organizations prioritize user-centric design, clear interaction models, and decision support rather than decision replacement. They also create trust-building experiences that give users visibility, control, and confidence. Adoption is a key driver of AI value.

***6. Build resilient AI systems—not just efficient ones***

As organizations deploy multiple interacting AI agents, systems become more dynamic, interconnected, and less predictable. Efficiency alone isn't enough. Systems must be designed to withstand disruption, adapt to changing conditions, and recover when things go wrong.

Leading organizations focus on continuous monitoring and observability, safe failure mechanisms, rapid recovery and adaptation, and cross-agent coordination. High-performing AI systems aren't defined by whether they avoid failure altogether, but by how well they detect, contain, recover from, and learn from failure.

***7. Culture and change management are the ultimate multipliers of AI value***

AI agents reflect the priorities, incentives, and behaviors of the organizations that deploy them. AI will be used for different purposes, depending on the organization's culture. For example:

- ***Cost-driven culture:*** optimize efficiencies
- ***Safety-driven culture:*** reinforce reliability
- ***Data-driven culture:*** improve decision quality
- ***Customer-centric culture:*** prioritize experience

Technology alone doesn't determine outcomes. Culture determines what gets measured, rewarded, challenged, and scaled. But culture doesn't shift through technology deployment alone. It requires intentional change management: clear leadership alignment, transparent communication, talent readiness, role clarity, governance, and reinforcement of new behaviors.

> "AI should extend human capability, not replace accountability."

**From AI strategy to execution: AI value is a leadership question**

Many organizations have made progress in AI experimentation. The challenge is translating business values into operational AI systems that can act, adapt, and scale responsibly. This requires alignment across strategy, architecture, governance, and operating models.

Organizations that succeed treat AI not as a standalone capability, but as part of enterprise transformation. The real work is connecting purpose to design, governance, and measurable outcomes.

AI agents are reshaping how decisions are made, risk is managed, and trust is built. For leaders, the question is no longer just about deploying AI capabilities. It's about asking: What kind of organization are we becoming as we scale AI?

**A final perspective**

As AI adoption accelerates, technical capability will continue to matter. However, long-term success will depend on clarity of purpose and consistency of values. Organizations that define what they value, translate those values into AI system design, and govern them through human-led, real-world execution will build systems that are trusted, resilient, accountable, and aligned with strategic goals.

In the end, AI agents won't simply demonstrate what organizations can automate. They'll reveal what organizations are prepared to amplify.

CGI

*Article by Helena Jochberger*

**Chris Pinaire, Director of New Implementations, *Global Shop Solutions***

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ERP implementations used to be measured in months of configuration and years of optimization. AI is collapsing both. Systems are starting to configure themselves against a manufacturer's real data, ease the burden of moving work step to step and keep tuning themselves long after go-live. That shifts consulting and implementation from deploying software to coaching manufacturers through smarter systems that build confidence in their data, processes and everyday decisions.

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***About Chris Pinaire***

Chris Pinaire, MBA, PMP, is the Director of New Implementations at Global Shop Solutions, where he has spent more than 20 years helping manufacturers connect their operations with ERP software they can trust.



## From Ambition to Execution: How Integrated Data, AI, and Automation Can Move construction, Engineering, and Facilities Management Closer to Net Zero

*Introducing IFS Zero – an Agentic Emissions Operating System that takes organizations from operational data to audit-ready disclosure*

For years, Net Zero has been one of the central conversations in the construction industry, and while the ambition to meet targets is high, what is unclear is how we'll get there.

When speaking to the industry directly, it is clear what the issue is, and it's not lack of data but fragmented data: Carbon data sits in spreadsheets and supplier information lives in another system. Project controls, procurement, and asset performance rarely speak to each other. As with many industries and operators within them, silos affect efficiency and sustainability reporting becomes one of its biggest victims.
That is the issue this article addresses. The day-to-day operational capability needed to measure, manage, and evidence progress on net zero, and turn it into commercial value.

I recently presented on the topic of driving sustainability initiatives within the construction industry at the *UK's Digital Construction Week*. Our presence at this event centered on a clear mission: helping construction and engineering organizations accelerate their journey to smarter, more sustainable project delivery. That's exactly why sponsoring the Net Zero Stage mattered so much to us. Across the two days, our team showcased how IFS Cloud and *our new IFS Zero solution* brings every part of a project and asset lifecycle into one connected platform, improving predictability, reducing rework, and enabling better-informed decisions at every step.

The Net Zero Stage gave us the opportunity to explain why decarbonization, resilience, and responsible project delivery and asset and facility management should not be sidebar conversations; they are central to the future of construction, and central to the technology solutions that we build at IFS.



*Article by*
Kenny Ingram ,
Vice President, Construction & Engineering

*Article by Kenny Ingram*

That end-to-end visibility is exactly what made the Net Zero Stage such an important platform for us. It gave us the opportunity to explain the "why".

**Why net zero matters to construction and engineering**

Pressure on the industry is building from several directions at once. Consider these figures:

- The built environment is responsible for roughly 25% of the UK's direct emissions. Include transport linked to the built environment and that figure rises to about 42%.
- Worldwide, the United Nations Environment Programme (UNEP), the United Nations' leading global authority on the environment, *recently estimated that the global buildings and construction sector is responsible for approximately 37% of global $CO_2$ emissions*. This includes both:
- Operational emissions from heating, cooling, lighting, and powering buildings, and
- Embodied carbon emissions from producing construction materials such as cement, steel, aluminum, glass, and from construction activities themselves.

Further regulatory pressures are driving decarbonization efforts:

- Regulation and standards are tightening.
- Planning authorities expect stronger evidence at submission.
- Public procurement is raising the bar through measures such as PPN 06/21.
- Clients increasingly want credible carbon performance, not promises.

For a construction firm, proving the drive to net zero affects eligibility to bid, win rates, reputation, risk, and long-term competitiveness. Companies that cannot evidence their carbon performance will find themselves locked out of work.

**Mastering the basics of data**

The underlying issue is structural. Most construction businesses still operate on disjointed, silo-based processes,Each stage holds part of the carbon story. From bid to contract, design and estimate, plan and schedule, procure and manufacture, construct and install, through to operate and maintain. None holds the whole story.

Three patterns appear repeatedly:

1. ***Fragmented data*** across teams, systems, and spreadsheets.
2. ***Disconnected supply chain and project controls*** that make whole-life carbon analysis difficult.
3. ***Weak evidence*** that struggles to stand up to client, regulator, or tender scrutiny.

That is why a reporting tool on its own is not enough. Reports are an output. Net zero performance is the result of how the business runs.

**IFS Cloud simplifies data management and operations**

IFS Cloud unifies project delivery, asset management, and service operations in one platform, connecting every stage from design and build through to operation and maintenance.

It is not a specialist carbon modelling tool. It is the operational backbone that helps a construction company plan, measure, control, and report carbon-related activity across the full project and asset lifecycle. It connects the business processes that drive carbon outcomes rather than producing reports after the fact. That distinction matters. Compliance becomes a by-product of running the business well, not a parallel workstream.

> "Reports are an output. Net zero performance is the result of how the business runs."

**IFS Zero transforms operational activity into verified Scope 1, 2, and 3 emissions reporting**

Sustainability teams in construction, engineering, and facilities management still spend too much time reconciling emissions data. Manual collection takes up 60–70% of the reporting cycle; and by the time sustainability teams get a number, it is often stale, disconnected from the operations or assets it describes, and hard to fully assure.

IFS Zero addresses this gap. As an agentic emissions operating system embedded in operational systems, it connects to the assets, facilities, supply chains, and business processes that generate emissions to capture, validate, and report Scope 1, 2, and 3 emissions with full traceability.

With IFS Zero, your team focuses on decisions, not data wrangling. Instead of waiting until quarter-end to identify performance gaps, organizations gain real-time visibility into emissions across their operations. The result is faster, more accurate reporting, greater confidence in sustainability data, and the ability to take corrective action before targets are missed.

**IFS Cloud & IFS Zero Helps Construction Firms Meet Net Zero Goals in Seven Ways**

***1. Carbon Data & Reporting***
Move beyond spreadsheets with centralized emissions data from projects, assets, procurement, field service, and finance. IFS Cloud supports audit-ready reporting, dashboards, and progress tracking against sustainability targets.

***2. Embodied & Whole-Life Carbon Management***
Gain visibility into materials, suppliers, sourcing decisions, waste, logistics, and plant usage to better assess and reduce whole-life carbon impacts.

***3. Smarter Project Controls***
Reduce emissions while improving margins through better planning, scheduling, resource coordination, cost control, and reduced waste, rework, and idle equipment.

***4. Asset & Service Optimization***
Improve equipment performance, reduce energy consumption, extend asset life, and optimize field service operations through predictive and preventive maintenance.

***5. Sustainable Procurement & Supplier Governance***
Strengthen supplier oversight, identify high-carbon materials and sourcing practices, and support low-carbon procurement strategies with greater transparency.

***6. Stronger Compliance & Tender Evidence***
Support Carbon Reduction Plans, PPN 06/21 requirements, and net zero commitments with reliable operational data, progress tracking, and auditable evidence.

***7. Automatic Emissions Reporting***
IFS Zero's AI agents automatically collect, validate, and map data, closing the intelligence loop. By connecting directly to data already within IFS Cloud, it eliminates the need for third-party data extraction, manual reconciliation, and time-consuming spreadsheet processes.

**The business value beyond compliance**

The most compelling net zero story is one that links sustainability goals to operational and commercial value. A firm that runs its projects, assets, and supply chain well will also produce better carbon outcomes, and better evidence to back them up. Better data and stronger process control deliver outcomes that any commercial director, COO, or VP of Operations recognizes:

- Greater project predictability.
- Less waste and rework.
- Stronger margin control.
- Higher bid win rates.
- Better decision-making across the lifecycle.

Today's construction and engineering firms need the operational capability to measure, manage, and evidence progress across projects, assets, procurement, and service. That is what moves the industry from ambition to execution. And that is where IFS solutions are designed to help.

To learn more about the new IFS Zero solution, *download the fact sheet.*

IFS

***About Kenny Ingram***
*Kenny is the Vice President for the following industries: construction, contracting, engineering, infrastructure and shipbuilding. In addition, he is heavily involved in other project and asset lifecycle industries including oil and gas, energy, utilities, and defense. Kenny's main responsibilities are to promote the IFS solution to the external marketplace and to educate the IFS workforce on the business issues and challenges these industries face. He is also a key member of the IFS product management team who are responsible for making decisions on the IFS product strategy. Kenny has been with IFS for 16 years and has worked in the business systems marketplace for over 20 years. He is now regarded as one of the top specialists in project-based business systems and has been heavily involved in driving the IFS strategy in this area for the last 16 years. Prior to this, Kenny worked in industry in various positions covering management & project accounting, supply chain and logistics.*



*Article by Kenny Ingram*

**Johannes Gudmundsson, CEO of *inecta***

"The best ERP implementations we see today aren't about automation for its own sake. They're about putting the right intelligence in front of the right person at the right moment. For instance, AI embedded in a customer's food ERP means a plant manager catches a yield issue before it becomes a recall, not after."



***About Johannes Gudmundsson***

As the founder and CEO of inecta, with a dual Master's in Mathematics and Computer Science, Johannes has spent over two decades building ERP technology for the food industry. Based in New York, he combines strategic acumen with a passion for endurance sports and chess, bringing the same long-game thinking to every product decision.




## Rootstock Software Launches Rootstock Ready: An Accelerated Path to Business Outcomes for Midmarket Manufacturers and Distributors

*New offering includes a core ERP solution and a rapid, outcomes-driven implementation approach, built with deep industry expertise and guided by proven templates*

Rootstock Software introduced Rootstock Ready, a curated ERP solution and implementation model built to help midmarket manufacturers and distributors achieve desired business outcomes faster. Developed by seasoned practitioners with an average of 20 years of industry experience, Rootstock Ready combines a core ***Rootstock ERP*** solution with template-based configuration to deliver a rapid path to go-live — and a durable engine for ongoing growth.

"***Rootstock Ready*** represents a dramatic departure from the way manufacturers and distributors have traditionally approached ERP," said ***Caroline Marty***, SVP of Global Professional Services & Enablement at Rootstock. "In the past, this journey was beset with unpredictable costs, timelines, and scope. Rootstock Ready brings expertise from our most seasoned practitioners as well as years of implementation experience into a structured model. As a result, customers gain clarity and confidence from day one — and a faster path to the outcomes they've set out to achieve."

Manufacturers and distributors have long faced a difficult tradeoff when selecting ERP solutions: adopt a powerful enterprise system with a long and complex implementation process or choose a simpler solution that is easier to deploy but lacks the product depth to support future growth.

"Rootstock Ready is designed to bridge the gap, providing an accessible way to implement our enterprise-grade ERP with a curated feature-set honed by our industry experts," said ***Ohad Idan***, Vice President of Product at Rootstock. "Companies gain access to the ***world's leading business cloud platform*** with its agentic AI capabilities. As a result, they can unify sales, operations, and service data for enhanced decisions. Starting with a focused scope, customers can expand into more capabilities over time, with the foundation in place to instantly activate AI once their organization is ready."

*Press Release from Rootstock*

Organizations adopting *Rootstock Ready* benefit from:

- Faster, lower-cost ERP implementation. A focused, template-based approach honed from deep industry expertise helps to significantly reduce implementation time, cost, and complexity.
- Fixed-fee model. A predictable, clearly defined investment that organizations can confidently bring to leadership for approval.
- A simplified, manageable entry into ERP. Companies implement the core capabilities they need to go-live quickly, within a clearly defined scope and aligned with their current business requirements.
- A ready-to-operate system at go-live. Built-in change management and training mean organizations begin running key processes immediately at go-live—and continue using and honing the system to its full potential long after launch.
- A scalable path forward. Customers can expand into additional capabilities over time as their operations evolve, without needing to implement a new system.

Based on prior implementation experience and early analysis, Rootstock Ready is projected to deliver up to 3x faster time-to-value, along with reductions in implementation complexity and cost. Central to Rootstock's model is an agentic implementation framework designed to further support and accelerate customer outcomes.

By combining a core ERP feature-set and a template-based path to implementation, Rootstock Ready will also give partners and resellers a faster, more accessible path to sales and implementation.

To learn more, visit the *Rootstock Ready* page or connect with the *Rootstock team*.

***About Rootstock***

*Rootstock Software provides the leading ERP for product companies, empowering manufacturers, wholesalers, and distributors to turbocharge their operations. Natively built on the Salesforce Platform, Rootstock is a modern, future-proof ERP with a fresh user experience. Users appreciate Rootstock's focus on customer success and its AI capabilities that offer a human-first approach. IT teams value Rootstock's platform as it minimizes the need to coordinate complex customizations and third-party integrations. All of these factors add up to delighted customers. As Rootstock continues to grow, stay tuned to hear about its new customers, career opportunities, and LinkedIn posts*





Kantata

## Sarah Edwards, Chief Product Strategy Officer, *Kantata*

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AI's greatest opportunity in enterprise isn't replacing human judgment, it's amplifying it. We're approaching a moment where the institutional and tribal knowledge that has historically lived in people's heads can be synthesized and operationalized by AI agents, making every team member more effective. For professional services organizations especially, that means smarter workflows, better decisions, predictable outcomes, and ultimately, a new kind of teammate that makes the humans around it more valuable, not less.

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***About Sarah Edwards***

Sarah Edwards is Chief Product Strategy Officer, where she oversees product strategy across all solutions in Kantata Professional Services Automation, ensuring a unified, customer-centric approach to product innovation that addresses professional services organizations' unique challenges. As an experienced consultant, project manager, global practice manager and business leader Sarah has extensive experience from the ground up on how to manage a successful services business. With over 27 years in the industry, Sarah has lived and worked both in the US and Europe to help customers achieve services success and deliver significant business value.

Having previously managed a global team at Hitachi Consulting in Europe and prior to that helped grow IT consulting firms Fulcrum Solutions and Edenbrook, Sarah has enjoyed considerable services success from upstart to global consulting businesses. At the time of its acquisition in 2009 by Hitachi, Edenbrook had reached over 400 people based in the UK and India.




# Aptean Appoints Yama Habibzai as Chief Marketing Officer

*Aptean, a global provider of purpose-built enterprise software for manufacturers and distributors, announced the appointment of Yama Habibzai as Chief Marketing Officer.*

Habibzai joins at a defining moment for Aptean, as the company deepens its vertical AI capabilities across its industry-specific portfolio, and scales its global presence in manufacturing and distribution markets.

He brings more than 25 years of experience scaling enterprise software and cloud companies through high-growth phases, including IPOs and major acquisitions. Most recently, he led marketing at Device42 through its acquisition by Freshworks, delivering strong pipeline performance while introducing AI-driven growth strategies. He has also held senior marketing leadership roles at Netcordia, Infoblox, SevOne, ScienceLogic, and IBM Cloud.

"Aptean is at an inflection point," said TVN Reddy, CEO at Aptean. "We are embedding AI natively across everything we build, and we need a marketing leader who can communicate that transformation with clarity and conviction. Yama has done this before – moving fast and delivering results with an entrepreneurial edge. We are delighted to welcome him and have him lead that charge."

"The opportunity here is significant," said Yama Habibzai, Chief Marketing Officer at Aptean. "Manufacturing and distribution are being fundamentally reimagined by AI, and Aptean is at the center of that shift. As companies move beyond AI experimentation and generic AI tools, the demand for purpose-built, industry-specific AI is accelerating. Aptean is uniquely positioned to capture it."

Habibzai holds a Bachelor of Science in Electrical and Computer Engineering from Worcester Polytechnic Institute and an MBA from Babson College.






# Salesforce Signs Definitive Agreement to Acquire m3ter

*Salesforce, the #1 AI CRM, announced it has signed a definitive agreement to acquire m3ter, a leading metering and rating platform purpose-built for consumption-based monetization. The acquisition will bring high-volume mediation, metering and rating capabilities natively to Agentforce Revenue Management, enabling enterprises to launch, track, scale, and bill with the flexible usage and outcome-based pricing models needed for the AI era.*

"Every company is looking for more flexibility in how they monetize their products, especially as AI shifts the landscape from traditional subscriptions to consumption-based models," said Meredith Schmidt, EVP & GM, Agentforce Revenue Management, Salesforce. "With m3ter, Salesforce will offer native consumption billing alongside our existing models, giving our customers more choice in how they grow their revenue without ever leaving the Salesforce platform."

m3ter's platform is designed for near real-time performance at enterprise scale, allowing customers to seamlessly ingest product usage data, dynamically configure consumption-based billing scenarios, and automate monetization data flows across CRM, ERP, and quote-to-cash systems.

"We founded m3ter to solve the hardest problems in usage-based pricing, drawing on over a decade of experience building cloud-based backend services," said Griffin Parry, Founder and CEO of m3ter. "Joining Salesforce allows us to bring our high-scale mediation and rating capabilities to the world's largest enterprise install base, helping every Salesforce customer unlock modern, AI-driven pricing models."

The transaction is expected to close in the second quarter of Salesforce's fiscal year 2027, subject to customary closing conditions.

*Press Release from Salesforce*




# U.S. Office of Personnel Management Selects Oracle to Power Federal Workforce Modernization

*AI-powered HR platform will help OPM reduce costs and improve efficiency, security, and service delivery for more than two million federal employees*

The U.S. Office of Personnel Management (OPM) has awarded Oracle a $395.8 million Federal HRIT Modernization Core Human Capital Management (HCM) contract to deliver the federal government's first governmentwide HR platform. Powered by ***Oracle Fusion Cloud Human Capital Management (HCM)***, the new platform will replace more than 100 separate systems and serve as the single, governmentwide system of record for workforce management under OPM's ***Federal HR 2.0 initiative***.

Many federal agency HR systems are not interoperable. This can create duplicated efforts and inconsistent data that often results in higher costs and delays in hiring and retirement processes. By consolidating its systems onto a single cloud platform, OPM expects to reduce costs to taxpayers by more than 90 percent while strengthening efficiency, security, and service delivery for agencies and employees alike.

"The federal government's HR infrastructure has become unnecessarily fragmented, making it harder for agencies to efficiently serve employees and taxpayers. Following a rigorous, competitive evaluation process that included extensive testing and input from agencies across government, we selected Oracle Cloud HCM to help consolidate dozens of disconnected systems into a modern, secure platform," said Scott Kupor, director, US Office of Personnel Management. "This is an important step toward improving interoperability, strengthening workforce data capabilities, and delivering a more effective and accountable HR experience across the federal government."

As the foundation for Federal HR 2.0, Oracle Cloud HCM will provide approximately two million U.S. Executive Branch civilian employees with an AI-powered, secure, FedRAMP-authorized HR platform. The solution will centralize HR operations on a single platform to improve the employee experience and effectively manage the federal workforce as a unified enterprise. Capabilities include position management, personnel action and records processing, workforce analytics, and employee and manager self-service, with integration to payroll, retirement, and benefits systems.

"Oracle is honored to partner with OPM to establish a secure, trusted foundation to unify federal HR operations," said Kim Lynch, executive vice president, Oracle Government, Defense & Intelligence. "And in doing so, we're extending our commitment to help government leaders make faster decisions while delivering to federal employees the modern experience they deserve."

**About Oracle Fusion Cloud Applications**

Oracle Fusion Cloud Applications provide an integrated suite of AI-powered cloud applications that enable organizations to execute faster, make smarter decisions, and lower costs. Oracle Fusion Applications include:

- ***Oracle Fusion Cloud Enterprise Resource Planning (ERP):*** Provides a comprehensive suite of AI-powered finance and operations applications that help organizations increase productivity, reduce costs, expand insights, improve decision-making, and enhance controls.
- ***Oracle Fusion Cloud Human Capital Management (HCM):*** Provides a unified AI-powered HR platform that connects people, processes, and data to help organizations automate the employee lifecycle, enhance the employee experience, and drive better business outcomes with a human-agent workforce.
- ***Oracle Fusion Cloud Supply Chain & Manufacturing (SCM):*** Provides a unified AI-powered platform that integrates supply chain and operations processes and helps organizations enhance resilience and quickly adapt to market changes.
- ***Oracle Fusion Cloud Customer Experience (CX):*** Provides a suite of AI-powered applications that helps organizations manage marketing, sales, and service processes to win business, build stronger customer relationships, and improve customer experiences.

ORACLE

***About Oracle***

*Oracle offers integrated suites of applications plus secure, autonomous infrastructure in the Oracle Cloud. For more information about Oracle, please visit us at www.oracle.com.*



*Press Release from Oracle*

PINE SERVICES GROUP

**John Mack, Chief Innovation Officer,**
***Pine Services Group***

"AI is reshaping how organizations interact with their ERP systems, but the fundamentals of a successful implementation remain the same. Technology can accelerate insight and productivity, yet the human elements of adoption, trust, and process ownership still determine whether an initiative succeeds or fails. At Pine Services Group, our community of ERP VARs uses AI to strengthen human decision-making, not replace it, giving the businesses they serve a real edge."



***About John Mack***
John Mack serves as Chief Innovation Officer at Pine Services Group, where he leads the company's efforts to define AI best practices and champion a technology-first mindset across its community of operating companies. In this role, he focuses on helping the organization and its partners harness emerging technologies to drive smarter, more efficient ways of working. Alongside this work, he continues to serve as CEO of The Vested Group, a leading NetSuite solution provider based in Texas, through the end of the year. Having built and scaled a technology-enabled services business firsthand, he brings a practitioner's perspective on how innovation translates into real-world impact. He now applies that lens to shaping the future of AI adoption at Pine Services Group.




## HubiFi and Rillet Partner to Make Daily Revenue Close a Reality for Modern Finance Operators

*This integration combines HubiFi's automated revenue recognition with Rillet's AI-native ERP enabling high-volume businesses to achieve daily revenue close – a first in GAAP-Compliant revenue accounting.*

HubiFi, the multi-source revenue recognition platform for high-volume businesses, and Rillet, the AI-native ERP for modern finance teams, today announced a partnership and bi-directional integration that enables daily revenue close in fully GAAP-compliant, ERP-integrated revenue accounting automation.

For many high-volume businesses, data complexity and multi-source reconciliation work has made revenue close nearly impossible. This integration changes that.

With HubiFi's deterministic automation layer, accounting and finance can ingest their 3rd party revenue data from Stripe, app stores, and billing platforms to run continuous reconciliation, producing completely GAAP compliant revenue-to-cash performance daily.

Rillet's AI-native ERP then provides teams with the ability to unlock AI-powered insights across accounting use cases, while keeping their general ledger in sync with source data near real time.

MIrage is the first mutual customer of the integration. With revenue data from Apple, Google, and Stripe, they are leveraging HubiFi and Rillet's integration to get a bi-directional look between general ledger entries and source data.

"Daily revenue close has been an aspiration in modern finance for as long as I've been in the space," said Jason Berwanger, CEO and co-founder of HubiFi. "Revenue is the core metric every finance team depends on. Without an accurate look at revenue, it's nearly impossible to operate effectively and with speed. Rillet built an ERP for the way modern finance actually operates, and HubiFi built the automation layer that gets multi-source revenue data piped in. Together, the workflow is finally what it should be."

"Every finance team wants to know their revenue number today, not at month-end. The reason they couldn't was architecture," said Nic Kopp, CEO and co-founder of Rillet. "HubiFi and Rillet solve that together, and Mirage is already doing it, pulling transactions from Apple, Google, and Stripe, closing daily, fully GAAP-compliant."

This integration is now available to joint customers. Learn more at *https://www.rillet.com/integrations/hubifi.*

*Press Release from HubiFi*



# IFS Named a Customers' Choice in the Gartner® Voice of the Customer for Cloud ERP for Product-Centric Enterprises for the Fourth Consecutive Year

*IFS is the only vendor to receive the Customers' Choice recognition in the 2026 Gartner Peer Insights Voice of the Customer for Cloud ERP for Product-Centric Enterprises, for four years in a row.*

IFS, the leading provider of Industrial AI software, has for the fourth consecutive year, been named a Customers' Choice in the 2026 Gartner Peer Insights Voice of the Customer for Cloud ERP for Product-Centric Enterprises. IFS is the only vendor to receive this recognition in this report, which we believe a milestone that reflects the sustained and high levels of satisfaction experienced by IFS customers year on year.

In this year's report, IFS received 155 reviews with an overall rating of 4.7 out of 5 and an 88% willingness-to-recommend score as of March 2026. IFS scored above the market average on both Overall Experience and User Interest and Adoption, placing it in the Customers' Choice quadrant for the fourth time since 2023.

Reviews from IFS' peers include:

- "IFS Offers Excellent Product Functionality With Strong Customer Engagement Approach. IFS has always been accessible to us as their customer, eager to help and have a genuine vested interest in product excellence and our experience using it." - *Data and Analytics Manager* – Manufacturing
- "IFS Product Stands Out in Highly Competitive Market. Very responsive! Product is outstanding - features, speed, robust." - *Director of IT* – Manufacturing
- "AI-Powered ERP System Enhances Manufacturing With Real-Time Information Display. It is an innovative ERP that incorporates the latest AI technology and is essential for the manufacturing industry." – *Director* - Manufacturing

IFS's comprehensive Cloud ERP capabilities are designed to help organizations in asset-intensive industries manage complexity, drive innovation, and deliver Moment of Service™ to their customers. Powered by IFS.ai, IFS Cloud connects people, processes, and assets across the value chain, enabling faster decision-making and increased productivity.

Being recognized as a Customers' Choice for the fourth consecutive year underscores the consistency with which IFS delivers value to its customers, as a sustained commitment to excellence. The 2026 recognition follows IFS achieving the same distinction in 2025, 2024, and 2023, making it the only vendor to hold the Customers' Choice position in this category across every edition of the report during that period.

***Cathie Hall, Chief Product and Customer Officer at IFS, said:*** "Four consecutive years as the sole Customers' Choice in this category is something we are truly proud of, because it is our customers who determine it. Their reviews reflect the real-world outcomes we work hard to deliver every day. We believe that industrial businesses deserve software that meets them where they are, and that grows with them as their needs evolve. IFS Cloud, powered by Industrial AI, is built to do exactly that, and this recognition tells us we are on the right track."

**Gartner clients can access the full report:**

Gartner, Peer Insights™ Voice of the Customer for Cloud ERP for Product-Centric Enterprises, Peer Contributors, March 2026.

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*Press Release from IFS*

Sage

**Dan Miller, EVP of Financials and ERP Division of *Sage***

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AI is shifting enterprise workflows from systems that report on what happened to systems that help you decide what to do next. When workflows are connected and data moves in real time, teams can see what's changing, understand the impact, and respond as it happens. This changes the role of the team – from doing the work to reviewing and acting on it – with the clarity and control to move with confidence.

"



***About Dan Miller***

As the Executive Vice President of the Financials and ERP Division at Sage, Dan shapes the strategic direction of the company's offerings to the mid-market. His responsibilities span across crafting business strategies to overseeing product design and delivery. With his extensive background in financial software and a focus on customer needs, Dan drives innovation and delivers solutions that empower small and medium businesses globally.




## Ericsson Scales AI Across the Enterprise with a Business Data Fabric and SAP

*SAP announced at the SAP Sapphire event that Ericsson is moving from AI experimentation to enterprise-wide execution by building a unified business data fabric with the SAP Business Data Cloud solution.*

The approach enables the company to scale AI use cases across the business, accelerate decision-making and deliver measurable operational impact. By combining a governed data foundation with the Joule solution and this foundation, Ericsson is creating the enterprise architecture needed to make AI trusted, repeatable and scalable across its global operations.

Ericsson, which celebrates its 150th anniversary this year, provides mobile network infrastructure across 180 countries, with more than 40% of the world's mobile traffic passing through its networks. As AI becomes central to both its technology road map and how it runs the business, Ericsson has prioritized building a strong, governed data foundation to support scalable and trusted AI.

*Press Release from SAP*

"Once you scale AI, it stops being an AI problem—and becomes a data problem," said Esra Kocatürk Norell, Vice President, Customer Experience, Enterprise IT at Ericsson. "That's why we invested early in a business data fabric. With SAP Business Data Cloud, we can define what data means once—from revenue to market structures and access rules—and apply it consistently across the enterprise. That's what allows us to scale AI in a way that is trusted, repeatable and delivers real business value."

At the core of Ericsson's approach is a federated data architecture that allows data to remain in place while centrally managing business semantics, governance and lifecycle policies. This reduces duplication, simplifies integration and ensures that consistent business definitions can be applied across both SAP software and non-SAP environments.

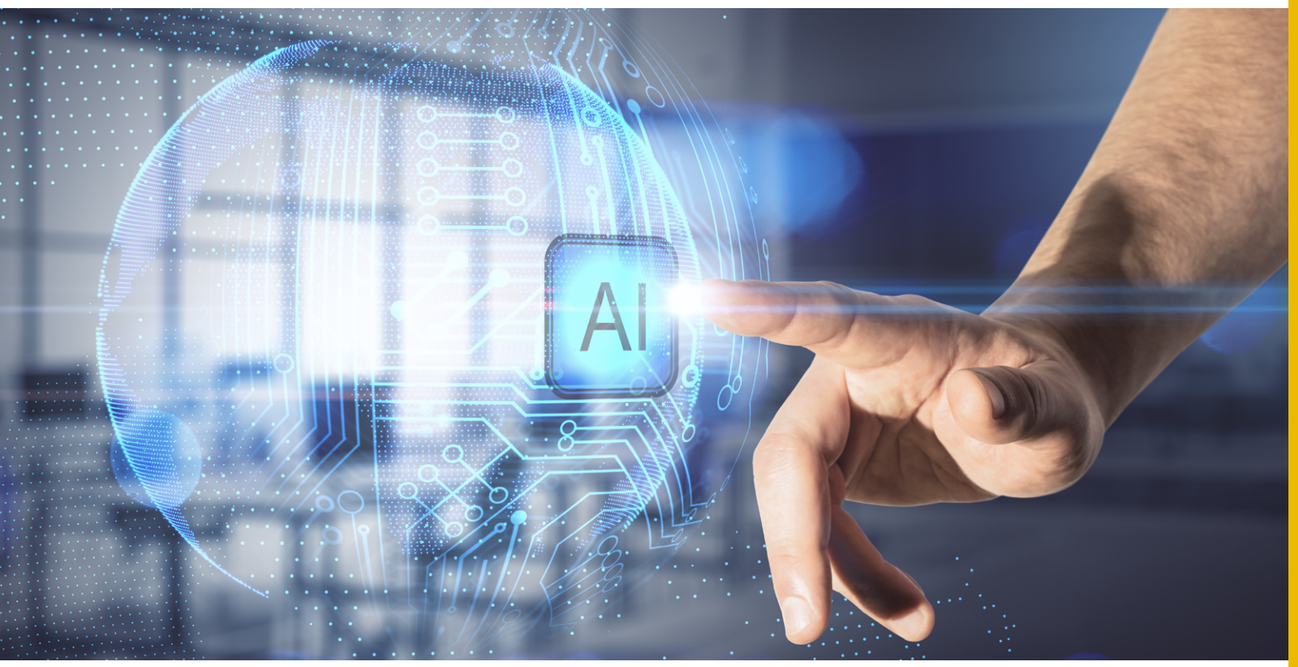
By focusing on high-impact use cases and organizing around end-to-end business processes rather than isolated solutions, Ericsson has moved beyond pilot projects to scaled deployment. Today, more than 85,000 users are live on unified Joule, supported by strong executive sponsorship and governance.

Ericsson is advancing its transformation on two parallel fronts. The first is modernization, including its transition to the RISE with SAP journey, the use of side-by-side extensions on SAP Business Technology Platform and a clean core approach that enables faster innovation without disrupting its ERP backbone. The second is what the company defines as "innovate and transform," focused on unlocking tangible business value from data and AI to improve decision-making, increase efficiency and enable new forms of value creation.

SAP and Ericsson are also collaborating on AI co-innovation initiatives. One example is an intelligent goal recommendation capability developed within the SAP SuccessFactors portfolio. The solution generates contextual, business-aligned goals for employees, improving execution and reducing administrative effort. The capability is now being scaled more broadly, demonstrating how co-innovation can create value beyond a single organization.

"Ericsson's approach shows how leading companies are moving from AI experimentation to execution by focusing on data, governance and business context," said Manos Raptopoulos, Global President Customer Success Europe, APAC, Middle East and Africa at SAP SE. "Together, we are helping organizations unlock the full potential of AI at scale."

Looking ahead, Ericsson expects its business data fabric to support increasingly advanced AI scenarios, including automated decision-making, improved productivity and new digital business models, while continuing to strengthen customer experiences in a rapidly evolving telecom landscape.






Sweep

## Ido Gaver Co-Founder & CEO of *Sweep.io*

"AI is fundamentally changing the relationship between people and enterprise systems. For years, complexity slowed organizations down because there were too many systems, dependencies, and decisions before work could even begin. AI understands that complexity. When AI operates with full enterprise context, people spend less time investigating and more time making decisions, solving problems, and driving the business forward."



***About Ido Gaver***

Ido Gaver is the Co-Founder and CEO of Sweep, the leading agentic workspace for metadata observability and governance. Before founding Sweep in 2021, Ido co-founded Flok (later acquired by Wix) and served in senior leadership roles at *Wix.com*, including GM B2B and Head of Partnerships. He holds a BSc in Electrical Engineering & Computer Science from Tel Aviv University and is passionate about helping businesses move from rigid workflows to adaptive, intelligent systems.




# Acumatica Tops ERP Customer Satisfaction and Product Usability Rankings in Newly Released Industry Reports

*Cloud ERP leader recognized by Nucleus Research, G2, TrustRadius, CRN, Great Place to Work, Construction Executive, and MeetGreen for product excellence, channel leadership, and workplace culture*

Seven recently released industry reports cited *Acumatica's* leadership in delivering innovative solutions and driving customer success and satisfaction, achieving channel excellence, and fostering a positive workplace culture the cloud ERP provider announced today.

These recognitions, contained in reports from Nucleus Research, G2, TrustRadius, CRN, Great Place to Work, Construction Executive, and MeetGreen, reflect Acumatica's commitment to enabling customers and partners to succeed while building a culture focused on innovation, customer-centricity, and accountability. Taken together, they reflect a consistent theme: customers, partners, and employees are all signaling that the experience of working with Acumatica exceeds expectations.

"These validations highlight what matters most to us: delivering technology that customers value, creating opportunities for partners to grow, and fostering a culture where employees can do their best work," said John Case, CEO of Acumatica. "We're honored to see our efforts acknowledged across such critical areas of the business. These achievements are a testament to the dedication of our thriving community of employees, partners, and customers working together to help drive our continued growth and success."

**Product Innovation and Customer-validated Excellence**

Nucleus Research named Acumatica a Leader in its *2026 SMB ERP Value Matrix*, marking another year the company has been recognized for delivering strong product functionality and usability to small and midsized businesses. Acumatica also achieved the highest usability score among evaluated vendors.

G2 included Acumatica in the *Top 100 Global Software Companies* and *Top 50 ERP Products* Acumatica also earned the *No. 1 Highest Rated spot among the Top 20 ERP Systems,* achieving an overall customer satisfaction score of 99.37.

In G2's Spring 2026 reports, Acumatica improved its ranking across 37 reports, placed among the top three vendors in 56 reports, and earned No. 1 rankings in seven reports spanning ERP, distribution ERP and advanced planning, and scheduling categories.

Acumatica earned three *2026 Top Rated Awards from TrustRadius*, an HG Insights Company, across *ERP*, *Accounting*, and *Supply Chain Management*. These categories reflect the core operational workflows where Acumatica customers report meaningful efficiency gains.

Acumatica also earned *Trusted Seller* designation from TrustRadius, an HG Insights Company, which recognizes vendors that demonstrate transparency in review sourcing, provide comprehensive product information, and actively support buyers throughout the software evaluation process.

"We celebrate products that consistently earn praise where it matters most: from their customers," said Rajat Bhatnagar, SVP, growth, HG Insights. "Acumatica earning three Top Rated awards across Enterprise Resource Planning, Accounting, and Supply Chain Management says something about a product that adapts to how businesses actually operate. Customers appreciate that the software bends to their processes rather than the other way around, and the operational efficiency gains they describe are specific and measurable. Congrats to the team on a well-earned sweep."

**Partner Channel Leadership**

Strong products create the foundation, and partner execution turns that foundation into market reach. Several honors this cycle acknowledge the people and programs that make that happen.

CRN recognized Acumatica as a 5-Star Award recipient in the *2026 CRN Partner Program Guide,* the publication's highest level of distinction. The annual guide evaluates technology vendors based on their ability to support partner profitability, growth, and long-term success.

CRN named Acumatica's Jessica Pidgeon, director of partner programs, and Aida Mahić, senior manager of partner operations, as *2026 Women of the Channel* The award celebrates their exceptional leadership and a commitment to bold, innovative strategies that fuel transformation, growth, and success for Acumatica and the broader channel.

The company was included in *Construction Executive's 2026 Top Tech program*, which highlights technology solutions helping construction firms improve business operations and project delivery.

**Workplace Culture and Responsible Growth**

The foundation of the company's product and partner success is a workplace culture that Acumatica has intentionally and carefully fostered over the years, and one that's continued earning external recognition this year.

Acumatica earned *Great Place to Work® Certification* for the third consecutive year, based entirely on employee feedback. The certification reflects Acumatica's continued focus on creating a workplace culture built on trust, collaboration, and professional growth.

Acumatica was granted Visionary status by *MeetGreen* for the *2026 Acumatica Summit*. The designation is given to organizations that prioritize sustainability measurement, continuously improve environmental performance, and leverage their influence to drive positive change across their events and vendor ecosystems.

"What makes these recognitions meaningful is that they cut across every part of our operations and engagements — our product, partner ecosystem, the team behind it, and how we run our events," said Case. "Growing mid-market businesses need a partner they can trust over the long term, and these accolades demonstrate that we're building something special and durable at Acumatica."

Acumatica
The Cloud ERP

*Press Release from Acumatica*

**Steve Karp, Chief Innovation Officer of *Unanet***

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AI isn't about replacing people or ripping out core enterprise systems - but It is about transforming workflows, reducing friction, delivering better business insights, and embedding intelligence directly into tasks so people can make faster, more confident decisions. AI improves workflows best when it operates inside existing systems of record because it can enforce standards, automate effort-heavy tasks, and make high-quality data more accessible to both people and analytics.

"



***About Steve Karp***

Steve Karp is Chief Innovation Officer for ***Unanet***, a Northern Virginia-based software company that provides enterprise resource planning and customer relationship management solutions for organizations in the government contracting, architecture, engineering, construction and professional services markets. Connect with him on LinkedIn ***here.***




# Sage and Village Capital Award $190,000 in Grants to Second Cohort of Impact Entrepreneurs

*Eight businesses from Sage's Impact Entrepreneurship Program received grants of up to $50,000 in a pitch competition.*

Sage, the leader in accounting, financial, HR and payroll technology for small and mid-sized businesses (SMBs), and its partner *Village Capital* have awarded 12 grants totalling $190,000 to entrepreneurs from the second cohort of the Sage Impact Entrepreneurship program, powered by Sage Foundation.

The grants were awarded at the Sage Impact Entrepreneurship Summit, a four-day gathering held across Atlanta and London that brought together founders, investors, mentors, and ecosystem leaders to accelerate the growth of impact-driven businesses.

The 25 start-ups that form the program's second Core Cohort are drawn from across the US, UK, and Europe, representing a growing generation of founders using business models to address challenges ranging from waste reduction and circular consumption to sustainable food systems and community resilience. Together, they reflect the increasing role entrepreneurship is playing in developing practical, scalable solutions to environmental and social challenges.

Throughout the summit, founders presented their businesses, impact models, and growth strategies. Grant recipients were selected using Village Capital's peer-selection methodology. By evaluating one another against shared business and impact criteria, founders surface high-potential ventures that may be overlooked by traditional funding systems.

*Press Release from Sage*

All start-ups were assessed on key investment criteria including team, product, value proposition, market, and scale. CIRT and Recovolt were selected by their peers as the top two companies in the program, and each received a $50,000 grant in recognition of their potential and impact. WattAir and METzero were close behind, each receiving $25,000 grants. Sage Foundation also awarded $10,000 grants to four additional businesses that were chosen by the audience on the night.

The grant winners from the US were:

- *CIRT* (Athens, US) is a circular economy software platform, keeping valuable materials in circulation, and out of the landfill, the environment and our ocean.
- *WattAir* (Atlanta, Georgia) is a climate technology company turning low-grade heat and air into clean water.
- *Rhino* (San Francisco, US) is an AI-powered insurance brokerage that finds coverage for hard-to-insure, climate-exposed property, using proprietary structure-level data to place risks where traditional brokers can't.
- *Tato Labs* replaces plastic at its source with regenerative, potato-based biomaterials designed for aesthetics and high-performance.

***Joseph Mooney, co-founder at WattAir, one of the grant winners, said:*** "The Village Capital – Sage Impact Entrepreneurship Program was exactly what I needed as a founder. It brought together a deeply supportive cohort, world-class industrial experts, investors, founders, and a team that pushed us to be ready for our next major milestone. More than anything, being surrounded by such an inspiring group of founders made the highs more meaningful and the lows much easier to navigate."

The grant winners from Europe were:

- *Recovolt* (Newcastle, UK) develops upstream infrastructure to safely neutralize end-of-life EV batteries at intake, enabling scalable reuse and recycling.
- *METZero* (Newcastle, UK) is a wastewater technology company that retrofits treatment sites with a novel solution that cuts pollution and energy.
- *Ecoswap* (London, UK) exists to shift everyday consumption towards brands that do right by people and the planet, using a simple digital gift card.
- *GreenFlip* (London, UK) helps asset owners and investors turn residential energy upgrades into predictable investments using AI-driven energy and financial modelling.

***Pavlina Theodosiou, CEO at METzero, said:*** "Like many technical founders, I naturally focus on the technology. One of the biggest shifts for me has been spending more time thinking about the business itself, the business model, growth strategy, investment readiness and how to communicate the opportunity more clearly. The Sage Impact Entrepreneurship Program has allowed me to learn from an incredible cohort of founders who are facing many of the same challenges. I encourage any founder who is serious about growing their business to apply to this program."

***Helen Devanny, Vice President of Sage Foundation, said:*** "When we first launched the Sage Impact Entrepreneurship Program, we wanted to show that Sage was serious about supporting businesses working at the intersection of sustainability and social impact. Cohort 1 showed us exactly what that could look like in practice, with six businesses receiving grants, all of them continuing to grow with our support. With Cohort 2, we've gone further — backing 57 businesses tackling social, environmental and economic challenges around the world. What excites me most isn't the number of businesses we've supported; it's the depth of what they're building, and the communities they're already changing."

Over the next two years, Sage and Village Capital will continue working alongside founders through mentorship, training, and strategic guidance designed to help them refine their models, accelerate growth, and create real impact in their communities. The program now supports 111 startups, marking significant progress towards its goal of backing 165 high-impact startups.

Reflecting on the role of programs like Sage Impact Entrepreneurship in helping founders grow, ***Kelly Bryan, Regional Director of the Americas and Europe at Village Capital, said:*** "Entrepreneurs understand firsthand what it takes to build and grow a company. They recognize the resilience, execution, and potential behind a business in ways that aren't always visible on paper. The founders selected by their peers have already demonstrated strong momentum, and at this stage, grant funding can help them strengthen their foundations, deepen customer adoption, and prepare for their next phase of growth."

Applications for the third cohort will open later this year. Learn more about the current US and UK & Europe cohorts on Village Capital's website:

*United States start-ups*
*UK and Europe start-ups*



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S T

## *Kailash Attal*, Chief Solutions Officer of *UST.*

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ERP systems have long served as the operational backbone of the enterprise. With AI, they are evolving into intelligent platforms that can anticipate needs, surface insights, and guide decisions in real time. While AI enhances speed and precision, people remain central to defining strategy, managing risk, and driving innovation. Together, they create a more agile and adaptive enterprise capable of delivering better outcomes across functions and business processes at scale with speed.

"



***About Kailash Attal***
Kailash Attal is UST's Chief Solutions Officer. He has over 30 years of experience across spectrums of services and solutions at leading IT firms. As an executive leadership team member, Kailash is responsible for creating, marketing, building, and implementing UST's Enterprise SaaS/ERP offerings portfolio that helps solve customer business problems and increase the ROI of our IT investments. Kailash is also responsible for UST's Managed Services offerings that deliver predictable outcomes and YoY savings while enabling customers in their transformation journey.



# Würth Elektronik Automates Tariff Mitigation Strategies with QAD FTZ

*Tariff volatility, shifting trade regulations and rising supply chain costs are forcing manufacturers to rethink how they manage global trade operations. For companies operating Foreign-Trade Zones (FTZs), manual processes and disconnected systems are becoming increasingly difficult to sustain as compliance requirements grow more complex and operational pressure intensifies.*

Würth Elektronik, a global manufacturer of electronic components and printed circuit boards, faced this challenge firsthand. With manufacturing and distribution operations spanning Europe, Asia and the Americas, the company needed stronger tariff mitigation strategies capable of supporting a highly globalized supply chain environment.

As tariff exposure became more persistent, Würth Elektronik turned to QAD Foreign-Trade Zone (QAD FTZ) to automate compliance processes, improve inventory visibility and strengthen operational control without disrupting its proprietary ERP environment.

**Managing Tariff Complexity Inside a High-Volume FTZ Environment**

Operating a Foreign-Trade Zone requires precise inventory control and recordkeeping under U.S. Customs and Border Protection regulations. Every item entering, moving within or leaving the zone must be tracked accurately in near real time.

For Würth Elektronik, the operational challenge was amplified by its proprietary ERP system.

"Our ERP is highly specialized," said Sara Farstad, Foreign-Trade Zone Administrator at Würth Elektronik. "If we were going to operate an FTZ successfully, we needed a solution that could work with our complexity and not create more manual work."

Daily admissions files could include up to 600 lines requiring data adjustments. Harmonized System classifications required constant monitoring, while domestic and FTZ inventory were not easily distinguishable at the shipment level.

As tariff complexity increased, manual interventions created operational strain and compliance risk.

**Würth Elektronik Selects QAD FTZ**

After evaluating multiple providers, Würth Elektronik selected QAD Foreign-Trade Zone (QAD FTZ). The company was looking for more than a standard FTZ platform. It needed a solution capable of integrating within a highly specialized ERP environment while supporting the operational realities of a high-volume FTZ program.

Equally important was the consultative approach from the QAD Professional Services team.

Rather than delivering a generic presentation, the team focused on Würth Elektronik's specific operational challenges and how QAD FTZ could support its tariff mitigation and compliance goals.

"Other providers gave us a standard presentation," Farstad said. "QAD FTZ showed us how the solution would work specifically for Würth Elektronik. They listened to our ERP challenges and helped us solve them."

> "If we were going to operate an FTZ successfully, we needed a solution that could work with our complexity and not create more manual work."
>
> — Sara Farstad, Foreign-Trade Zone Administrator, Würth Elektronik

QAD | Redzone worked closely with Würth Elektronik to create structured link files and controlled data transfers between its proprietary ERP system and QAD FTZ.

Functioning as a compliant Inventory Control and Recordkeeping System (ICRS), QAD FTZ automates inventory tracking by zone status, value and movement while supporting annual reconciliation and customs reporting requirements.

The solution also automatically updates Harmonized System codes, flags obsolete classifications and supports structured admissions processing.

**Automation Delivers Measurable Operational Relief**

Before QAD FTZ, manual processing created a significant administrative burden across Würth Elektronik's FTZ operations. High-volume admissions files required constant updates, while inventory tracking and classification management consumed valuable administrative time.

Today, Würth Elektronik uses structured upload tools within QAD FTZ to correct admissions data in bulk rather than line by line. Automation has helped reduce manual effort while improving inventory visibility, reporting accuracy and operational consistency.

"We may process hundreds of lines in a single admissions file," said Farstad. "With QAD FTZ, we can update and resubmit in bulk instead of line by line. That alone changes the workload."

Operational improvements include:

- Bulk admissions processing that reduces manual workload
- Automated HS code management that proactively flags obsolete classifications
- Near-real-time inventory visibility across FTZ and domestic inventory
- Improved shipment traceability and audit readiness
- Stronger compliance through structured inventory tracking and reporting

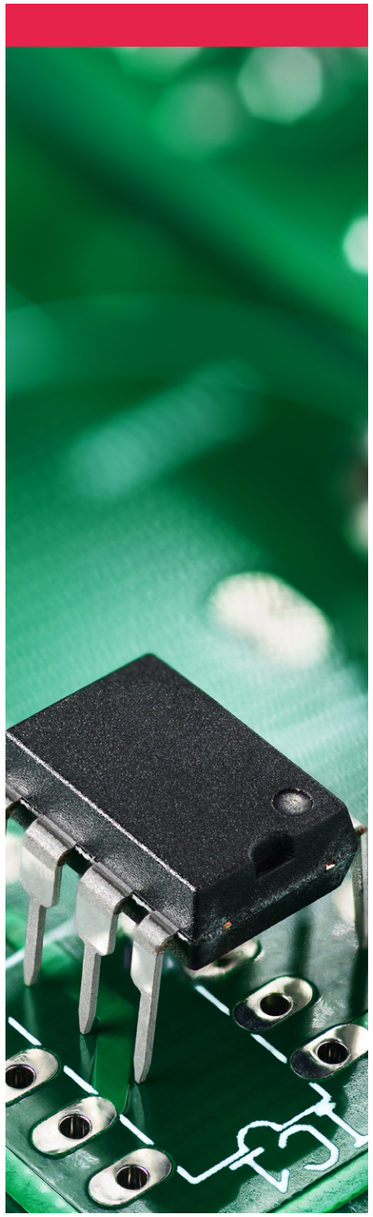
Rather than forcing ERP replacement or disrupting operations, QAD FTZ embedded automated FTZ management directly into Würth Elektronik's existing supply chain architecture.

> "With QAD FTZ, we can update and resubmit in bulk instead of line by line. That alone changes the workload."
>
> — Sara Farstad, Foreign-Trade Zone Administrator, Würth Elektronik

**Turning FTZ Operations Into a Strategic Tariff Mitigation Advantage**

By implementing QAD FTZ, Würth Elektronik transformed its Foreign-Trade Zone from a manual compliance requirement into a structured tariff mitigation strategy supported by global trade management software.
As more goods move through the FTZ, *the company can defer or eliminate duties* where applicable while maintaining service commitments to customers. Greater visibility into inventory movement and documentation requirements has also improved coordination between sales, logistics and compliance teams.

Clear visibility into whether orders consume domestic or FTZ inventory now allows sales and logistics teams to anticipate documentation requirements earlier in the process, reducing downstream disruption.



Automation has also improved confidence across the broader supply chain.

Würth Elektronik's freight forwarding partner, experienced with multiple FTZ platforms, has recognized the operational strength of QAD FTZ and the responsiveness of the QAD | Redzone team, and has begun recommending the solution to other companies navigating tariff complexity.

Today, Würth Elektronik operates its FTZ with automation, structured compliance and greater operational confidence.

**Key Benefits of QAD FTZ at Würth Elektronik**

With QAD FTZ in place, Würth Elektronik has strengthened its *tariff mitigation strategies* while improving operational efficiency and compliance. Highlights include:

- Reduced manual workload through bulk admissions automation
- Improved visibility across FTZ and domestic inventory
- Automated HS code management and compliance monitoring
- Stronger audit readiness and shipment traceability
- Structured global trade management without ERP disruption

Würth Elektronik's story demonstrates how manufacturers can modernize FTZ operations to better manage tariff volatility, strengthen compliance and protect margins in an increasingly unpredictable trade environment.

Read the full *Würth Elektronik customer case study* to learn more.

QAD



ORDERWISE FORTERRO

## Carrie Tallett, Senior Product Manager, *Forterro*'s *Orderwise*

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AI is accelerating the shift towards unified, insight-driven ERP systems. With AI embedded into modern ERP and SaaS workflows, it improves data visibility, shortens the reporting and audit cycle, and frees teams of repetitive tasks so they can focus on customers, quality, and growth plus creates internal mobility opportunities. Combining connected systems with AI-driven forecasting and real-time decision support enables organisations to respond faster. Therefore, teams can collaborate to solve supply chain issues and see faster ROI than working in isolation.

"



***About Carrie Tallett***
Carrie leads the strategic development of ERP and WMS solutions and with over a decade of experience across product management, customer success, and operational strategy. She brings a practical and customer-centric lens to digital transformation, working with mid-market businesses across the food & beverage, pharmaceutical and e-commerce sectors. The comment will focus on how AI-powered ERP can unlock greater visibility, control, and efficiency across supply chains.




# Greater reach and more efficiency – proWirtschaft GT unlocks its full marketing potential with Odoo

*The pro Wirtschaft GT GmbH, the central economic development agency for the Gütersloh district (Germany), has successfully modernized its regional business consulting and customer communication using Odoo Online. By migrating over 40,000 contacts and automating its marketing workflows, the agency overcame rigid legacy systems. The digital transformation achieved a 60% boost in CRM productivity, a 40% increase in sales efficiency, and doubled their monthly newsletter output—significantly strengthening their digital reach and engagement with local companies and startups.*

pro Wirtschaft GT (short: proWi) is an economic development agency based in the district of Gütersloh. At proWi, specialists and executives from local companies find tailored offers and initial consultations on key topics such as innovation, digitalization, sustainability, growth, business challenges, and employer attractiveness. Additionally, they provide advice and resources for startups and aspiring entrepreneurs.

**Legacy software slows down customer communication**

The core of any consulting business is communication – both in person and digitally. However, when it came to digital communication, proWi was hitting a wall. Rigid email templates and a lack of integration for dynamic placeholders made daily operations difficult. This resulted in tedious manual adjustments that were not only time-consuming but also prone to human error.

Actively informing customers about events and updates via newsletters was heavily restricted in the old system. As is so often the case when software features are clunky and cumbersome, they are simply left underutilized. This was a prime example of how a poor system can paralyze operations and prevent a company from reaching its full potential.

One specific hurdle with the newsletter was setting up the double opt-in process. This procedure requires interested subscribers to give explicit consent before they can be contacted. A simple sign-up form isn't enough; users must actively click a confirmation link sent via email. This ensures that every recipient in the mailing list genuinely wants to be contacted and prevents users from being alienated by unsolicited emails. Furthermore, the entire process must be transparently documented within the system.

**Odoo Studio – Tailored solutions in just a few clicks**

Targeted communication with proWi's broad audience posed a major challenge for other software solutions. Working alongside a dedicated Odoo expert, the proWi team set out to map these industry-specific requirements directly within Odoo.

The critical first step was migrating existing contact data onto the new platform cleanly. Thanks to Odoo's user-friendly migration features, over 40,000 contacts were successfully transferred into the new system architecture, forming the data foundation for all future email communications.

To facilitate this, the Email Marketing and Marketing Automation apps were implemented. Even in their standard configurations, both modules offer a wide array of features – ranging from email templates with dynamic placeholders to precise mailing list management. The required double opt-in workflow was also set up with minimal effort.

To precisely categorize contacts and build targeted mailing lists, proWi required custom data fields. In other software solutions, such adjustments are either impossible or require expensive custom coding. Thanks to Odoo Studio, however, this customization was achieved with very little effort.

**What is Odoo Studio?**

Odoo Studio is a visual editor that allows users to modify standard modules and adapt them to industry-specific requirements. Thanks to its intuitive no-code environment, changes can be implemented quickly and cost-effectively – often by the users themselves.

Alongside the marketing modules for newsletter delivery, Odoo's Events app was also deployed. By hosting a variety of engaging informational events, proWi continuously expands its network and generates new leads. The seamless integration of event and attendee management into the same platform ensures a fully centralized and comprehensive database.

The entire implementation process was guided by structured change management. In weekly status meetings, the proWi team collaborated with Odoo experts to discuss ongoing challenges and goals. Step by step, hurdles like the



double opt-in setup were resolved, requirements were defined, and end-users were trained.
More opportunities, greater reach, and enhanced efficiency with Odoo

Thanks to Odoo's versatile features and customization options, proWi quickly closed the gaps in its newsletter communication. Contacts are now much easier to track, and numerous contact management processes are fully automated. As a result of these CRM improvements, the team reports a productivity boost of over 60% in this area.

Perhaps more than in any other industry, an improved CRM in the consulting business directly impacts sales processes. Automation ensures that even older contacts receive relevant information and offers. This prevents leads from slipping through the cracks, allowing the team to experience a 40% increase in sales efficiency thanks to Odoo.

These productivity gains have opened up entirely new opportunities. Because sending newsletters is now much more intuitive and targeted, proWi utilizes this channel far more frequently. Thanks to Odoo, they have doubled their monthly newsletter output.

"As is so often the case when software features are clunky and cumbersome, they are simply left underutilized. This was a prime example of how a poor system can paralyze operations and prevent a company from reaching its full potential."

It's not just the quantity that has increased; the quality of the layout and design has improved significantly due to the new dynamic placeholders. This boosts both the overall reach of their marketing activities and the relevance for their target audience.

Odoo is far more than just a marketing tool. As an all-in-one software solution, it covers all business areas. Consequently, proWi has also replaced its old Excel spreadsheets in HR management with Odoo. Time tracking and time off requests now run entirely through the platform.

Thanks to Odoo's fair pricing model, these additional apps come at no extra cost, since license fees are billed per user – with all apps included.






# TASi Measurement

*Global Business Standardizes on Epicor Kinetic to Automate Processes, Drive Consistency, and Prune Resource Demands*

**Company Facts**

- HQ Location: Largo, Florida, USA
- 16 businesses in the group
- Global leader in measurement instrumentation
- Specialist Industry: Measuring and Controlling Devices Manufacturing
- *Visit customer website*

**Challenges**

- Assimilating new acquisitions across the globe
- Manual, paper-based processes
- Excessive inventory

**Benefits**

- Decrease inventory after implementation by 40% and match inventory turn targets
- Reduce invoicing time from 22 days to 2 days after implementation
- Facilitate annual IT savings of more than $300K and 30 hours
- Standardized Chart of Accounts
- Support sustainability efforts through a move towards a paperless shopfloor

**Unlocking Potential**

When is ERP more than a software package? When it becomes a catalyst for business transformation. Daniel Topp, VP of IT at TASi Measurement, revealed, "As we deploy Epicor Kinetic across our businesses, we see it as an opportunity to improve processes, save time, and increase competitiveness. Epicor offers a global platform to establish a center of excellence for running our operations."

**Diverse Businesses, Unifying Solution**

Industries as varied as energy and life sciences, automotive and agriculture, chemical and water processing share a demand for measurement and monitoring solutions. TASi Measurement provides temperature, level, flow, and pressure instruments and facilitates data gathering and reporting from remote telemetry products. Sixteen business units manage production facilities in the United States, Canada, Switzerland, Germany, and UK with additional sales offices in the Netherlands and China.

M&A is a significant contributor to growth, and TASi Measurement has recognized the need to establish a standard set of operating procedures and a common ERP solution to maximize efficiency and visibility. In 2017, the company adopted Epicor Kinetic which was deployed in the cloud with the goal of migrating all current and future businesses to the solution. Topp shared, "Epicor Kinetic is our ERP of choice, and six of our 16 businesses are already running it. Currently, we onboard one company a year, however we are planning that to double to two businesses annually starting next year."

**Standardization Accelerates Success**

A key driver of moving the TASi Measurement business units to Epicor Kinetic is process standardization. "Epicor is very customizable, but we try to stay as off-the-shelf as possible to maintain consistency, streamline upgrades, and drive efficiency," Topp clarified.



Consolidating on Epicor facilitates knowledge sharing and establishes best practices in reporting and automating; it also streamlines intercompany tasks such as purchase orders, sales orders, and invoicing between businesses, and standardizes part numbers and naming conventions. For example, when we onboard a new business they can leverage the TASi Measurement standards like the chart of accounts which replace business-specific account charts. "This eliminates hours spent gathering, cross-checking, and combining account lists across the businesses," Topp observed. "Epicor Kinetic supports us in establishing 'gold standards' across the entire group."

Similarly, deploying Epicor Kinetic in the cloud has expedited cohesion. "There are tremendous benefits to a SaaS model," Topp imparted. "Uppermost are continuous updates to the latest and greatest functionality—that's fantastic. Epicor also offers us flexibility; we do not have to be the pioneer, and we can choose to stay on a version for longer if needed." The cloud also eradicates the need to manage an on-prem environment, which preserves resources while ensuring security.

**Optimized Inventory Management**

As TASi Measurement acquires new businesses, Topp gains visibility to a range of ERP solutions and has a window to compare them to Epicor.

Topp shared a vital example: TASi Measurement sets an inventory turns target for its businesses. One company, Sierra Instruments, who manufactures high performance mass flow meters and mass flow controllers for nearly any gas, liquid, or steam application, could only meet that goal after deploying Epicor Kinetic. "Within 18-months, we reduced inventory by 40% and hit the inventory turn mark," he disclosed.

Topp credited that achievement to the business focusing on this initiative along with utilizing Epicor Kinetic to specify parameters such as minimum- and maximum-on-hand and safety stock and attaching alerts to those parameters. He adjoined, "Epicor enabled that business to fully utilize MRP—which massively impacts how well the business operates—right-size inventory and creates a much more competitive posture for Sierra Instruments."

**Liberated Resources Speed Growth**

Another TASi Measurement business, is about to go live on Epicor Kinetic and expects a substantial benefit. Today, the accounts receivable manager utilizes a 19 – 25 working-day manual process that requires her to consolidate data from disparate systems to create an invoice which is prone to errors. "Epicor Kinetic will eliminate an excruciating manual data consolidation process and slash the time required to less than two days—just a phenomenal impact," Topp divulged. "That means the manager can work more meaningfully, focus on tasks that add value to the business, and be more present with customers."

Topp noted that deferred revenue functionality is also a significant advantage. It allows the company to invoice for the next 12, 24, or 36 months while recognizing revenue over the appropriate time period.

> Epicor Kinetic will eliminate an excruciating manual data consolidation process and slash the time required from 22 days to less than two days—just a phenomenal impact.

Automating processes with Epicor Kinetic can help to save money and facilitate company growth.

"Watching a business go from a sub-par ERP or a highly manual process to Epicor Kinetic is incredible," Topp elaborated. "Epicor Kinetic is not just for where a business is now; it offers a platform to support growth for the next decade."

**Rolling Out Expertise**

With a regular cadence of implementing Epicor Kinetic, Topp and his team are becoming experts at the rollout despite the nuances of different operating models, such as the service-based monitoring and data collection business. He highlighted, "The current deployment is under budget and scheduled to go live within a 9-month timeline. To ensure smooth implementation, TASi ensures a debrief takes place after each deployment to share the best practices and lessons learned."

"One of our businesses Pulsar Measurement a world-leading manufacturer and supplier of flow and level instrumentation and pump control technology, has taken advantage of Epicor and TASi Measurement group standards to embark on a journey to a paperless shop floor. By having documentation in a central place and easily accessible via terminals across the warehouse, paper usage has already been cut by a third," Topp stated; "Pulsar is also exploring adding Epicor Enterprise Content Management (ECM) to accelerate the transition."

Topp also appreciates Epicor Country Specific Functionality (CSF) packs as his team deploys the solution globally. "Epicor CSFs help us meet the unique needs of different countries, such as language and sales tax," he explained.

**Data Fuels Impact**

Epicor dashboards keep teams aligned on tasks and schedules, and reporting informs improved decision-making. For instance, field parameters such as, lead times, minimum order quantity and price breaks help TASi Measurement procurement teams buy materials at the right time for the correct cost to optimize MRP.

> I want IT to be more than a cost center. I want to demonstrate to leadership how we positively impact the business. In 2024, we've saved the business over $300K and saved our end-users more than 30 hours. Epicor has been a critical component supporting these achievements.

"Being able to sequence and prioritize work correctly delivers massive efficiencies," Topp acknowledged. "Getting a handle on costs is a huge advantage, as well as understanding what a job should cost and what it actually costs in terms of materials, overhead, and labor. With Epicor, we have all that data at our fingertips."

Topp continued, “I want IT to be more than a cost center; I want to demonstrate how we positively impact the business. In 2024, to date IT have saved the business over $300K and saved our end-users more than 2,000 TASi minutes. Epicor has been a critical component supporting these achievements.”

**Informing Green Efforts**

Another initiative on Topp’s agenda is supporting TASi Measurement’s sustainability team in achieving ISO 14001 compliance certifications (addressing environmental concerns, legal requirements, and ongoing improvement) across the businesses.

Topp described, “At TASi Measurement, sustainability is central to our corporate strategy. By managing sustainability, we reduce our environmental footprint and ensure business growth through strong governance, risk management, product innovation, and employee engagement. We are continually exploring new ways to reduce our environmental footprint through energy efficiency, waste minimization, life cycle assessments, and supporting sustainable sourcing. To ensure we hold ourselves to a high environmental standard, we are certifying all our manufacturing sites to ISO 14001, a globally recognized environmental management system standard.”

“Our global sustainability goals allow us to embed a culture of sustainability into everything we do and to share our challenges and success stories transparently. Our commitment to sustainability is good for the planet and good for business. Our products are used daily to track sustainability KPIs, including water usage, wastewater discharges, methane emissions, and reducing inefficiencies via industrial automation. We look forward to utilizing the carbon tracking and reporting functionality currently being built into Epicor Kinetic and sharing our progress with you.”

Standardizing Epicor Kinetic has become a transformative tool for streamlining operations, optimizing inventory management, reducing costs, and supporting rapid growth. Topp summarized, “Epicor Kinetic is more than a powerful ERP solution. It instigates standardization and consistency across our business to create a foundation for growth.”






# Andover Fabrics Doubles Growth with Modern Cloud ERP

| | | |
|---|---|---|
| **86%** | **99.6%** | **Days** |
| increase in booked revenue over first four months | year-over-year growth in UK fabric design sales | saved in manual work to update catalogs |

andover

Andover Fabrics, a century-old company that distributes fabric to quilt shops, ran on a sunsetting Microsoft Dynamics SL system. It needed a modern ERP platform to automate manual processes and a sophisticated digital storefront to transform their online shopping experience. Andover Fabrics deployed Acumatica Distribution Edition, which improved inventory management, saving days previously spent manually loading items. When connected to BigCommerce, Andover gained frictionless online purchasing workflows that dramatically increased sales.

**Key Results**

- Accelerated Growth: Increased booked revenue by 86% over the first four months since the integrated website launch with Acumatica and BigCommerce
- Better Insights: Gained visibility into new KPIs, including a 99.6% year-over-year growth in UK fabric design sales
- Eliminated Redundancies: Saved days of manual work loading new products into the online catalog
- Transformed Online Shopping: Greatly improved the B2B buying process with frictionless online purchasing
- Integration Excellence: Gained a seamless data sync between Acumatica and BigCommerce

**Challenge**

Andover Fabrics distributes quilting fabric to 2,000 quilt stores. While the family-owned business built a great reputation, its digital storefront was a major hurdle for online sales.

"We transitioned from an old ERP system, which looked like it ran on MS DOS," says Adam Weinstein, Andover's President. "It wasn't until very recently that we had the technology partners and the solutions that we needed in order to take this business forward."

Running on legacy Microsoft Dynamics SL, the company was bogged down with manual data entry. It took a month to upload 500 SKUs—a task required five times a year. B2B customers were forced to call to place orders and had zero visibility into real-time stock levels or "back-order" status, which is critical for quilters managing complex projects. Customer complaints were growing; the digital hub simply wasn't convenient for the modern buyer.

> Revenue is at record levels, and our book-ahead sales are at record levels since we implemented Acumatica with BigCommerce."
>
> -Adam Weinstein,
> President, Andover Fabrics

**Solution**

Weinstein knew a cloud-based platform was the only path forward. "After doing research and seeing what the capabilities were of several options, it felt like Acumatica was the right system and the right platform for our next level of growth," he says. He liked that Acumatica Distribution Edition offered an end-to-end solution to streamline and automate many of the company's workflows, and that it had an open API that allowed third-party applications to connect to it seamlessly.

Helping seal the deal was Andover's long-standing technology partner, MaxQ Technologies, who was deeply familiar with Acumatica and highly recommended it as the ideal flexible platform for their growth. To bridge the gap between the new ERP and the customer-facing experience, Friends of Commerce was brought in. As a B2B Certified BigCommerce Partner and an Acumatica Alliance Partner, FoC took the lead on the digital commerce strategy.



The project required deep technical collaboration. FoC customized the BigCommerce B2B application to handle Andover's unique business requirements, such as specific units of measure (yards vs. bolts). Both MaxQ and FoC worked collaboratively to ensure the integration between Acumatica and BigCommerce was flawless. This approach allowed the teams to customize the connector to meet Andover's specific data needs, ensuring that inventory and product attributes flowed seamlessly from the warehouse to the web.

**Outcome**

"Revenue is at record levels, and our book-ahead sales are at record levels since we implemented Acumatica and integrated with BigCommerce. In the first two months of this year, versus the first two months of last year, we booked 88% more business," says Weinstein

.

Acumatica and the added functionality to our website automated workflows that were previously grueling. "Uploading new fabric to the catalog and website takes hours rather than days," says Weinstein. Customers now have real-time information at their fingertips, including yardage availability and the ability to search by color, designer, or pattern.

"We're able to pull this information from Acumatica directly through the connector and onto the website," Weinstein adds. "I can take my whole catalog right now and send a customer a shoppable page. That's possible because Acumatica has all these attributes we can input for all the different stock items and FoC built the infrastructure to surface them."

Andover Fabrics now has access to data it never had before. In fact, Weinstein questioned one KPI. "There are times that I've looked at the growth in sales and the growth in demand that we've had, and I've actually thought that something was broken," he explains. "Our sister company, Makower UK, wanted to know how much of their designs we've sold in the US in 2025 versus 2024. I ran the report, and it showed 99.6% year-over-year growth. That number is clearly wrong," he remembers thinking. "So, I went into our sales by item and checked line by line. Sure enough, it's 99.6% growth. We basically doubled how much we've done," Weinstein says. "It's been really impressive and really fulfilling."

> "Acumatica, in large part, has made our growth possible. And with the right partners we are doing things we really couldn't have done before."
>
> -Adam Weinstein,
> President, Andover Fabrics

**Conclusion**

Andover Fabrics has gone from lagging online to leading the industry. "The solution we have now has changed the trajectory of our business," says Weinstein. "Whenever you can make one of your greatest weaknesses into one of your biggest strengths, that's what moves the needle."

By leveraging the power of Acumatica Distribution Edition, the ERP expertise of MaxQ, and the B2B commerce leadership of Friends of Commerce, Andover Fabrics has built a scalable foundation for the future. "Acumatica has made our growth possible," Weinstein says. "And with the right partners, we are doing things we really couldn't have done before."




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