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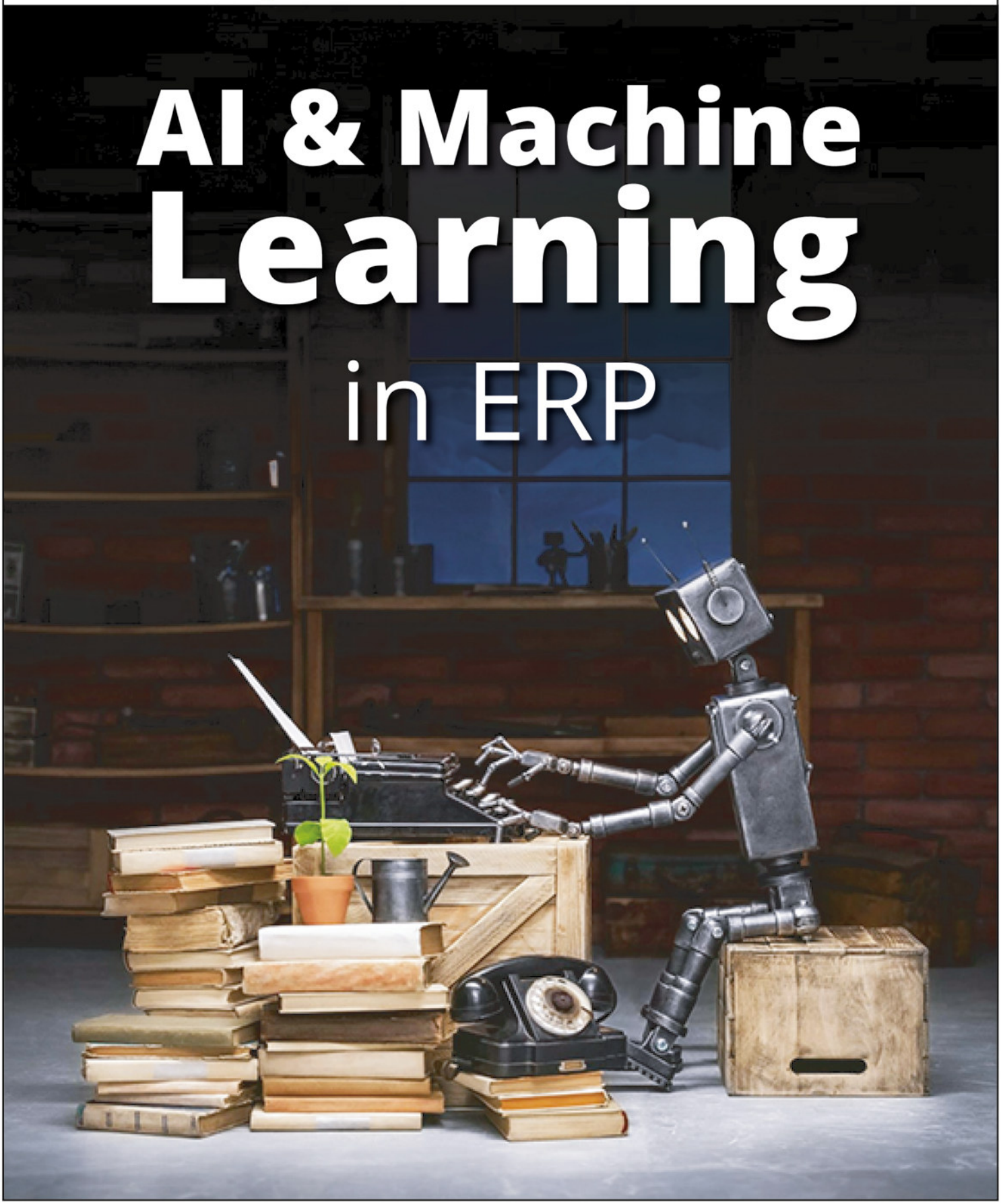
AI & Machine Learning in ERP



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EDITOR'S NOTE

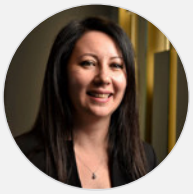
The world of Enterprise Resource Planning (ERP) is undergoing a radical transformation, and at the heart of this revolution lies Artificial Intelligence (AI) and Machine Learning (ML). These technologies are no longer futuristic concepts—they are here, reshaping ERP systems to be more intelligent, predictive, and efficient than ever before. In our February issue, we dive deep into this paradigm shift, exploring how AI-driven ERP is enhancing automation, optimizing decision-making, and providing real-time insights that drive business success.

One of the highlights of this issue is our exclusive Q&A with Jeremy Larsen, Vice President of Product Management at Acumatica. Acumatica's latest 2024 R2 update has brought AI-driven analytics, anomaly detection, and enhanced automation capabilities to the forefront, further solidifying its position as a next-generation ERP solution. Larsen shares insights into how AI is shaping ERP innovation, improving user experience, and driving operational efficiency for businesses across industries.

As AI and ML continue to gain traction in ERP, selecting the right solution is more critical than ever. That's why we're also bringing attention to the upcoming ERP HEADtoHEAD™ event, hosted by Lumenia Consulting, taking place on April 2-3 in Milton Keynes, UK. This event offers ERP buyers a unique opportunity to compare 14 leading ERP solutions, including SAP S/4HANA, Acumatica, Infor, Oracle NetSuite, and Microsoft Dynamics 365 Business Central, among others. Featuring live product demonstrations, vendor showcases, and expert-led panel discussions, this is an unmissable event for organizations looking to upgrade or implement an ERP system.

At ERPNews, we are committed to keeping you informed about the latest trends and developments in the ERP landscape. AI-powered ERP is not just a passing trend—it is the future. Whether you are in the early stages of selecting an ERP or looking to leverage AI for greater business intelligence, this issue will provide valuable insights to guide your journey.

Enjoy the read, and let's build the future of ERP together!



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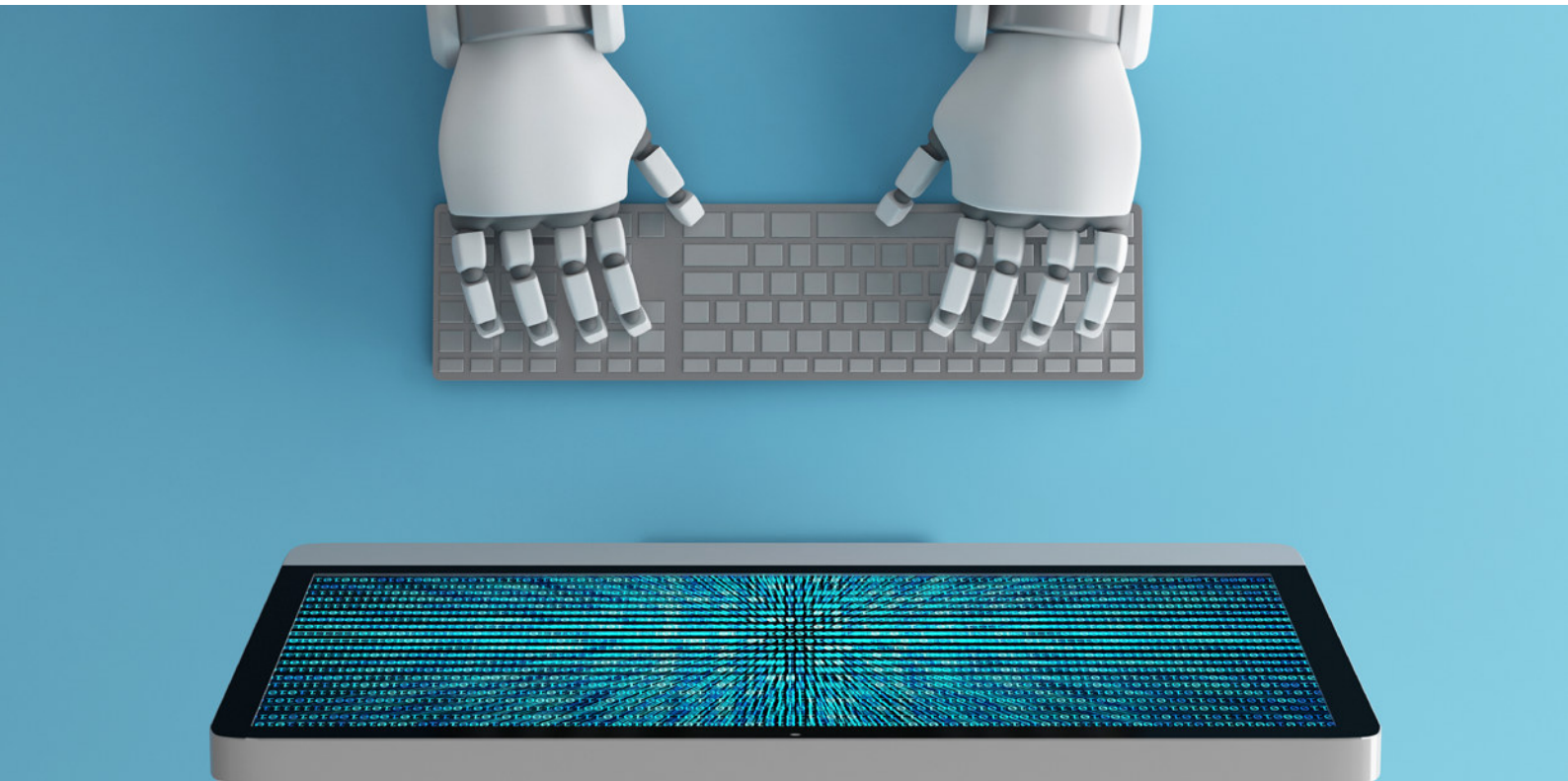

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Identify The Best ERP Solution for Your Business at The ERP HEADtoHEAD™ Event

The 10th UK Lumenia Consulting ERP HEADtoHEAD™ event returns to the DoubleTree by Hilton, Milton Keynes on 02-03 April. The unique format of the event brings together the leading ERP software providers, who must follow a script during their presentations, allowing ERP buyers to compare solutions like for like.

The event welcomes organisations that are looking to review, upgrade or replace their ERP systems or those who simply want to find out more about the ERP marketplace and trends. It is an ideal opportunity for senior finance or IT executives and members of their ERP transformation teams to efficiently review the leading ERP products and to learn how to manage their selection process so that risk is reduced and benefits are maximised.

The event will feature ERP product demonstrations from 14 leading ERP software providers. Solutions suitable for various organisation sizes, from large corporations to SME's, will be represented. ERP solutions to be demonstrated include SAP S/4HANA, Acumatica, Infor, Oracle NetSuite, Epicor, Sage Intacct, SAP Business One, Microsoft Dynamics 365 Business Central, IFS, SAP Business ByDesign, Intact iQ, Rootstock, Microsoft Dynamics 365 F&SCM and Sage.

The event kicks off with the ERP vendors taking part in an 'Elevator Pitch'. During this session the vendors present a summary of their USP's to convince delegates why it would be a good idea to attend their ERP system demonstrations. Over the two days, delegates can choose to attend ERP demonstrations focused on Finance, Production, Procurement, BI & Analytics, Projects, Supply Chain or Sales. The demos are based on standardised high-level scripts which makes it easier for delegates to make an efficient apples-to-apples comparison of the leading ERP solutions.

The ERP packed Agenda will include keynote presentations from Lumenia Consulting on 'Are you ERP Ready', 'What Makes Successful ERP Implementations', 'Navigating the Intersection between ERP and Digital Transformation' and 'Key Considerations when selecting a new ERP? It will also include vendor showcase presentations on key ERP topics and will display insights around new technology. Day 2 will conclude with a panel-discussion from industry end users on 'Avoiding ERP Implementation Mistakes', always an event highlight.

There will be ample opportunities for delegates to meet with the ERP vendors within the expo area and to network, learn and compare experiences with other organisations also planning to implement ERP.
There are also fantastic delegate prices up for grabs including the latest Apple Watch and One4all vouchers.

Previous delegates have commented positively on the event with many attending a number of events during the course of their ERP projects.

"It was one of the best conferences I attended. It was great to see so many products and vendors in the one place. It cut down on the time and research we would have it put into each one. It made it easier to compare each product. For a company just at the start of the ERP process, it was an excellent foundation, provided a roadmap for our journey but also highlighted potential potholes along the road", commented a recent event delegate. The event is facilitated by independent ERP consultants *Lumenia Consulting* who will also be on hand to offer impartial guidance and advice.

For further information on the event, early bird discounts and to register please visit the event website *erpheadtohead.com/uk*

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AI in Accounting: A Transformation

Artificial intelligence (AI) is transforming accounting processes and, therefore, the work of accountants and auditors, while also delivering significant benefits to businesses. We can expect this trend to continue and possibly accelerate. AI has the potential to assist accounting teams in solving many of their perennial challenges and elevate their role within organizations. Knowledge is power, so let's explore the key technologies in accounting AI, their benefits and challenges and how to leverage them for business and professional success.

What Is AI in Accounting?

Like most modern AI uses, AI in accounting is powered by a set of closely related technologies: machine learning (ML), deep learning, natural language processing (NLP) and generative AI. Taken together, these technologies represent a professional game-changer for accountant teams and accounting processes alike. AI tools can analyze vast data sets, identify patterns, make predictions, extract and synthesize structured and unstructured data, and can automate tasks, such as data entry, transaction reconciliation and financial reporting. AI is particularly useful in accounting because it can intelligently handle much of the heavy lifting, resulting in increased team productivity, better accuracy, cost savings and improved support for business decision-making.

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Key Takeaways

- AI is revolutionizing accounting processes with its ability to help automate tasks, analyze vast amounts of data and predict trends, which is exciting to some and concerning for others.
- Business benefits of AI include reduced costs and improvements in efficiency, accuracy, scalability, client service, fraud and anomaly detection, and decision support.
- AI lets accounting teams concentrate on consultative and high-value activities, rather than transactional tasks. This transition is quite valuable but may require changes in skills and mindset.
- Many of the current challenges involved with AI are likely to resolve as the technology evolves and becomes more mainstream.
- Leading-edge accounting software embeds AI functionality that makes use of the accumulated data.

> "AI is revolutionizing accounting processes with its ability to help automate tasks, analyze vast amounts of data, and predict trends, resulting in increased efficiency, accuracy, and cost savings for businesses."

AI in Accounting Explained

AI is used by accounting teams across industries, for purposes such as bookkeeping, tax preparation and financial audits. The "big four" public accounting firms — Deloitte, EY, PwC and KPMG — have already tapped into AI to transform their financial audit processes and internal workflows, such as managing audit reviews and approvals. Internal accounting and audit teams at companies of all sizes are beginning to follow suit or will be soon.

For instance, auditors can eliminate transaction sampling — and the risks associated with that traditional practice — because AI can quickly analyze an entire accounting data set. In another example, accountants are enhancing the audit process by using AI to identify unusual or anomalous transactions as part of planning and risk assessment stages, rather than uncovering them as part of field work. Meanwhile, smaller accounting firms are ramping up more slowly, using AI for research, tax-return preparation and bookkeeping services, but they're expected to accelerate their pace.

Overall, accounting teams at companies of all sizes and industries are implementing AI to make their processes more efficient, improve accuracy and support decision-making. This can be achieved in many ways, including adopting automation for touchless invoice processing, supporting more frequent and comprehensive forecasting, and making data analysis and scenario planning easier and faster. As a result, staff time can be reallocated to tasks that require more thoughtful finesse, such as strategic planning. This is welcome news for chief financial officers (CFOs) and financial controllers who have been trying to *evolve their accounting and finance teams* to be consultative and provide high-value insights that move the business forward, rather than to focus mostly on reporting.

Key Technologies in Accounting AI

Many technologies are formally or informally referred to as AI. The four closely related technologies mentioned earlier — ML, deep learning, NLP and generative AI — form the foundation for AI in accounting, as they do for most other current applications of AI. They are the engines that enable AI to do more with data, faster and with greater precision. Robotic process automation (RPA) and optical character recognition (OCR) are older technologies that don't use AI but are sometimes integrated with AI capabilities or confused with AI. They're included in the following list to help set the record straight.

> "AI lets accounting teams concentrate on consultative and high-value activities, rather than transactional tasks, helping them provide strategic insights that move the business forward."

1. Machine Learning

ML allows a computer to "learn" on its own, without being specifically programmed. It relies on algorithms that evolve with experience to form descriptive, predictive and prescriptive suggestions based on data. ML supports smart automation and can identify patterns from massive volumes of data that humans simply can't process at the same rate. For example, ML can create sales forecasts using historical point-of-sale data down to the SKU level. ML can also analyze transaction patterns and flag anomalies indicative of potential fraud, thereby enhancing internal controls. Additionally, ML aids in bookkeeping by automatically assigning general ledger expense codes to invoices.

2. Deep Learning

Deep learning is a type of ML built on neural network architectures — multilayered networks of artificial neurons encoded in software. Although AI systems that predate deep learning have, for many years, achieved success in areas such as image recognition, NLP and predictive analytics, newer deep-learning-based AI systems consistently outperform them. Deep-learning technologies improve the performance of all the accounting functions mentioned in the preceding ML discussion.

3. Natural Language Processing

NLP reads and interprets words instead of numerical data. Older NLP technologies continue to be useful, but newer NLP capabilities are almost always built on deep learning. NLP can summarize volumes of text, such as financial news or customer feedback, into structured data that enriches accounting functions. For example, NLP's ability to synthesize tens of thousands of customer reviews could inform the reserve estimates for future product returns or alert for potential inventory sellouts. Contract analysis is another application of NLP in accounting. It involves reviewing and extracting key points from contracts and legal documents to ensure adherence to financial agreements and highlight risks. NLP can also assist with accounting compliance by examining regulatory documents from government, industry, tax and accounting authorities.

4. Generative AI

Generative AI is the surprising capability of certain deep-learning AI models to rapidly create content in response to text prompts. Generative AI models represent a significant advance in AI because they not only understand natural language, but they also can generate it. Generative AI tools can synthesize knowledge from many sources and contribute to problem-solving across multiple domains of expertise. In accounting, for example, generative AI can produce first drafts of reports and financial statements. It also can assist accountants and auditors in exploring a business's financial data to identify opportunities to improve financial efficiency.

5. Robotic Process Automation

RPA software is not AI technology but is sometimes thought to be because it can be coded to perform certain tasks that previously required human workers. But RPA works only with structured data and is most appropriate for rules-based transactions — although this is changing rapidly as RPA continues to be integrated with ML. But because RPA's key benefits are speed and consistency, even without ML it has many applications in accounting. RPA supports *automated accounts payable (AP) systems*, for example, which can be used to match supplier invoices with purchase orders, compare travel expense items with company policies and *reconcile accounts*. On the accounts receivable side, RPA can validate customer invoices by ensuring proper authorization, pricing and descriptions of products/services and then automatically posting them to revenue accounts in the accounting system. RPA bots that collaborate with ML-based AI technologies are far more capable for accounting applications such as intelligent invoice processing, fraud detection and automated compliance checks.

> "The combination of AI and ERP systems enables businesses to leverage clean, reliable data to streamline processes such as invoice processing, fraud detection, and forecasting, ultimately fostering better decision-making."

6. Optical Character Recognition

OCR is a non-AI technology that converts text from scanned or digital documents into machine-readable text. Newer ML-based NLP systems easily perform the same function, which is sometimes still called OCR since businesspeople understand what that terms means. Both the old and new versions of OCR functionality eliminate manual data entry, which saves time and reduces the potential for

Article by Rebeca Bichachi

human error. Additionally, they enhance document storage by digitizing documents and making them searchable. This capability is typically included in better accounting software, especially for invoice processing as part of automated AP.

Benefits of AI in Accounting

AI's benefits hit all the crucial notes for accounting: accuracy, efficiency and scalability. Further, AI adds unmatched speed. The following are some key advantages of AI in accounting.

- ***Increased efficiency:*** When AI is used to handle the volume of routine tasks, accounting teams can spend more time on value-adding work. This balance helps increase overall productivity and makes better use of the accounting staff's expertise and experience.

- ***Enhanced accuracy:*** Automation, such as coding general ledger transactions, minimizes manual errors, helps improve accuracy and reduces rework, such as fixing misclassifications.

- ***Improved decision-making:*** AI helps get better information into decision-makers' hands quickly. AI-assisted analysis can also be more comprehensive, drawing up data from the entire organization to surface deeper business insights.

- ***Enhanced fraud detection:*** Data analysis that identifies anomalies and outliers is a primary way to detect potential fraudulent transactions. AI's ability to quickly examine massive data sets greatly expands those efforts. As a result, the use of AI in antifraud programs is expected to triple over the next two years, according to a 2024 survey by the Association of Certified Fraud Examiners.

- ***Cost savings:*** Automating routine tasks helps companies save money by reducing the amount of time staff spend on rote tasks, as well as through process improvements that, for example, minimize or eliminate late payments, doing the same for associated fees and penalties.

- ***Scalability:*** Because AI automation handles many rote tasks, such as calculations, cross-checking and data entry, it helps accounting processes scale along with the business. This is particularly beneficial given the *ongoing shortage of accountants*, attributed mostly to burnout.

- ***Better compliance:*** The compliance challenge in accounting is about putting processes in place so that transactions are handled properly (in accordance with laws/regulations/standards) and then identifying errors — data errors, errors in interpreting GAAP, reporting errors. AI-based predictive analytics gives accountants both a wider and a finer net to catch those errors and, therefore, reduces potential compliance risks. Early detection of anomalies in accounting data is the best defense against compliance issues. Additionally, AI may be able to monitor relevant external sources for changes in regulations.

- ***Improved client services:*** AI tools help the accounting team provide better and more consistent service to internal departments and external clients and partners. Communications, such as email, can be made more professional through the use of generative AI. And more accurate information paves the way for better customer service and avoids embarrassing interactions, such as sending dunning notices to a customer who has already paid their bill.

Challenges of AI in Accounting

As with the introduction of any new tool, AI in accounting is not without a learning curve, and its use must be modeled and encouraged from the top down. Only then can meaningful efforts be taken to overcome the other challenges listed here.

- ***Initial costs:*** The initial costs of AI can be a barrier to adoption, even when long-term savings and benefits are expected. These costs include software licenses, possible integration costs and training for IT staff and employees. However, AI capabilities are often deployed as an integrated part of business applications that companies already use and so have no separate cost. Cloud-based SaaS applications that offer "free," integrated AI features can minimize upfront costs and simplify adoption. This approach also allows staff to use AI easily within their familiar workflows, reducing the need for additional training.

- ***Skills gaps:*** The skills gap between accounting and AI expertise is another obstacle for companies looking to adopt the technology into their finance functions, especially among smaller companies that have fewer resources and less technological capacity. Further, the skills gap can differ significantly among employees of different generations, requiring thoughtful and ongoing training programs.

- ***Regulatory concerns:*** Accounting is subject to many layers of regulation from various standards-setting bodies. As with any other tool, ensuring that AI keeps up with these changes can be difficult. In addition to financial regulations, AI that accesses sensitive information is subject to data privacy and security regulations. Embedding AI into accounting systems that are continually updated to reflect the latest changes in regulation can go a long way toward solving these issues.

> "AI-powered tools like NetSuite Bill Capture and Analytics Warehouse enhance productivity by eliminating manual data entry and providing actionable real-time business intelligence for accounting teams."

- ***Integration issues:*** Legacy systems may not be capable of integrating with AI software, either entirely or only with costly customization. Additionally, anemic or inaccurate data degrades the quality of AI output, so siloed, unverified or incomplete data in existing systems needs to be cleaned in order to achieve the full benefits of AI and avoid faulty results. Using cloud-based integrated business accounting software suites with embedded AI capabilities can avoid this issue.

AI Trends in Accounting

It's an exciting time for accounting teams as they become more familiar and comfortable with AI and the technology becomes more ubiquitous in their everyday work. Leading software companies are baking AI into their offerings, such as enterprise resource planning (ERP), accounting and financial systems, to enrich functionality. As AI continues to gain momentum, here are several trends to be aware of.

AI as a Capable Assistant/Adviser

AI capabilities are emerging as a kind of adviser for business accountants, enhancing their ability to provide valuable insights and make informed decisions. Because AI enables modern accounting software to analyze far more data than previously possible, it can bring new patterns and trends to accountants' attention, which helps them provide strategic guidance to their organizations. AI can also suggest ways to increase the accuracy of forecasts, optimize tax strategies and automate compliance checks. And AI systems never tire of generating new and different financial scenarios to assist accountants in exploring the nuances of their forecasts and recommendations.

AI as a Competitive Differentiator

It's fairly easy to grasp how AI can be a competitive advantage for business functions like sales and marketing — just think of those "you may also like" suggestions from online retailers. But what about the accounting function? Consider the relationship between more accurate forecasts and the optimization of inventory and labor scheduling. AI can analyze historical data and market trends to help staff develop more precise demand forecasts, so

Article by Rebeca Bichachi

that businesses can stock the right amount of inventory items at the right times. This helps reduce losses from obsolescence and minimizes holding costs.

Enhanced Predictive Analytics

Many companies use predictive analytics to estimate what would happen if certain conditions were met using probability, quantitative analysis and modeling techniques. It's hard, complicated work. However, now that AI can autonomously identify patterns in data and develop predictive models, more businesses can use these models to help forecast outcomes, such as revenue and cash flow. Additionally, AI takes business intelligence and predictive analytics to another level by incorporating unstructured data, such as social media posts, customer service calls, videos, images, emails and external web pages. This information helps improve the quality of the predictions by including such variables as customer behavior and market trends. In turn, more business leaders are expected to use AI-enhanced predictive analytics to gain superior insights and make better-informed decisions.

Real-Time Data Analysis

AI-supported systems can automate real-time data analysis, performing it much faster and more accurately than humans. This not only improves the speed and quality of reporting, but it also enables quicker action, which can make all the difference from a competitive point of view. Real-time analysis also plays a critical role in improving customer service, fraud detection and forecasting. Given these significant benefits, real-time data analytics is expected to become a staple of modern accounting software.

Integration of AI with Blockchain

Blockchain technology's record-keeping feature makes it a natural fit for accounting and auditing. Blockchain organizes records in a way that makes changing a transaction entry impossible, which is important for overall data governance, reliability and compliance and is particularly helpful for the auditing process. AI can quickly analyze large amounts of data and examine blockchain transactions to identify any abnormalities or alterations. For example, when used together, AI and blockchain can increase the efficiency of auditing financial transactions, leading to quicker, less labor-intensive audits.

> "AI tools can analyze vast data sets, identify patterns, and automate tasks such as data entry, transaction reconciliation, and financial reporting, transforming the role of accountants."

Examples of AI in Accounting

AI is helping to transform the way accounting teams work by streamlining and enhancing various functions. Across the board, there is evidence that AI is driving improved efficiency and accuracy. Some specific examples of AI in accounting are explored below.

- ***Forecasting:*** AI can be used to analyze large volumes of historical data and identify patterns that help predict future trends and outcomes. This predictive financial analysis aids in forecasting cash flows, revenue, expenses and other financial metrics based on the insights derived from the data analysis. AI-based forecasting models get better as more data becomes available, providing more accurate projections than traditional statistical forecasting methods.

- ***Scheduling:*** AI can assist with scheduling resources, such as staff and inventory, based on periods that are projected to be busy or slow. It can also help schedule and centrally monitor tasks, including cash collections, department calendars and the monthly *accounting close.*

- ***Managing cash flows:*** By predicting sources and uses of cash using data from multiple systems, including AR and AP, AI can generate more accurate *cash flow* estimates. This helps businesses better understand their cash position, potentially improving investment returns and reducing unnecessary borrowing costs.

- ***Automating workflows:*** AI can bring a higher level of sophistication to workflow automation. Beyond simply routing tasks, AI can decide what needs to be routed vs. what can be automatically accepted based on past experience or certain rules. This helps reduce the workload for staff and the potential for items to fall through the cracks. Automated processes often include travel and entertainment expense reports, invoices, account

reconciliations and audit workpaper review.

- ***Composing emails and inbox management:*** AI can review and sort received emails by category, topic or priority and flag those that require a reply. It's also helpful for when users compose email replies, evaluating grammatical accuracy, tone and form. Beyond that, AI-powered email assistants can automatically extract relevant information, update customer relationship management (CRM) systems and draft a reply to questions.

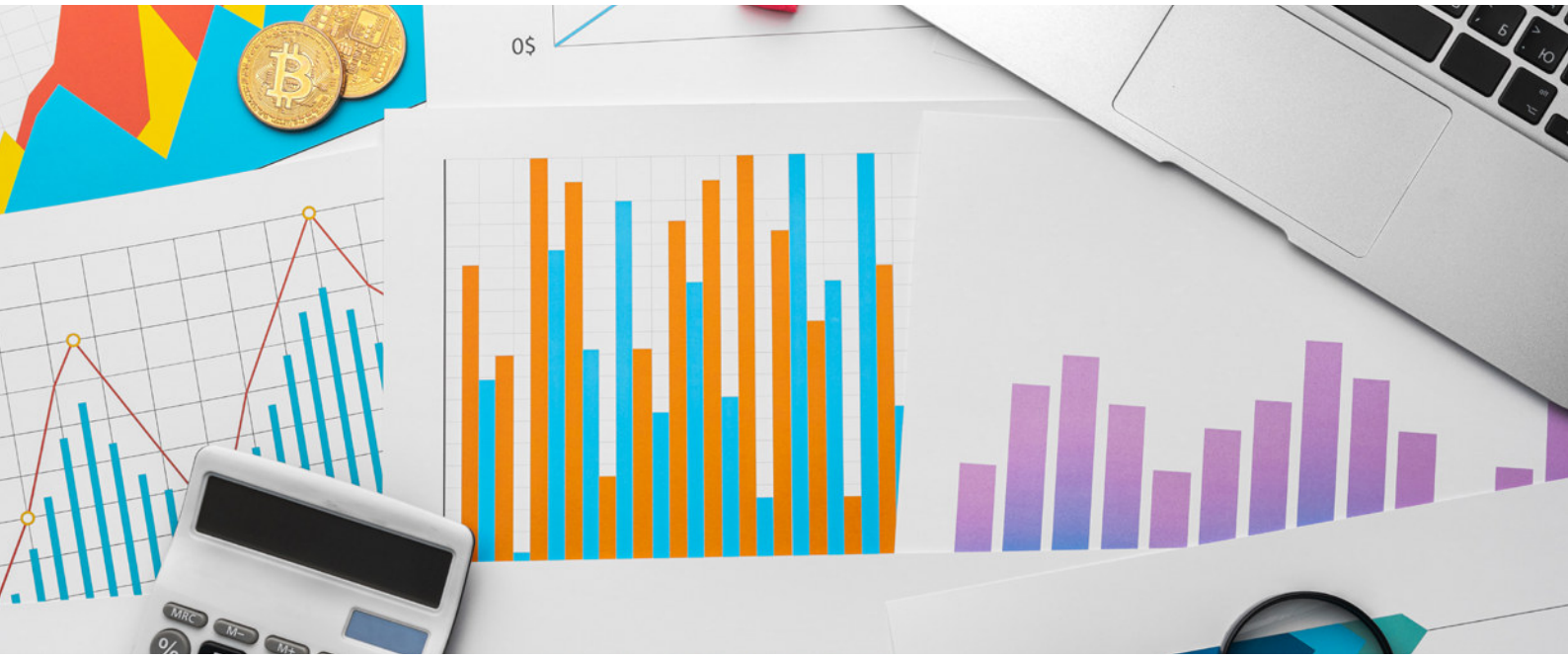
- ***Invoice processing and expense management:*** AI can automatically identify and record the relevant data from supplier invoices, as well as *match* purchase orders, delivery documents and receipts. This helps increase productivity, improve accuracy and accelerate payment processing.

- ***Data analysis:*** AI excels at pulling together data from disparate locations and creating reports at a level of depth and speed that is unmatched by humans. For example, AI can generate an analysis that shows variances to budgets, as well as comparisons to internal and external benchmarks. With that legwork completed, accounting staff can spend more time understanding the issues and developing action plans, rather than creating the analysis.

> "Generative AI can produce first drafts of financial reports, assist in exploring data for opportunities, and create actionable insights, elevating the value of accounting processes."

- ***Business communication:*** Whether communicating with customers, investors or colleagues, AI can help increase efficiency and enhance relationships. For example, AI can gauge sentiment in customer emails, route them to the correct AR or customer service clerk for a proper reply and then help compose appropriate email responses.

- ***Project management:*** AI can be used for project management at several stages of an accounting project. First, AI can organize all project documents and maintain version control, which is especially helpful for iterative projects, such as developing a capital budget. Next, the technology can transcribe and summarize notes from project meetings to help keep everyone on the team up to date. Then, using predictive analytics, AI can flag potential project overruns before they happen, such as when implementing a new automated billing system. Finally, AI can generate progress reports that keep the CFO and team on track to complete the project.



Article by Rebeca Bichachi

Learn How AI-Powered ERP from NetSuite Helps You Manage Your Business Better

AI is a powerful tool that enhances the output and efficiency of accounting departments. Its ability to gather, analyze and synthesize data makes it a game-changer, but AI tools require clean, reliable and complete data. This is the primary advantage of pairing AI with an ERP system that combines accounting and operational data from all parts of the business. *NetSuite ERP* incorporates *NetSuite AI* functionality, giving businesses quick access to all the potential benefits.

> "AI's ability to detect anomalies and potential fraud enhances internal controls, providing organizations with a robust mechanism for ensuring data integrity and security."

For example, *NetSuite Bill Capture* uses AI to eliminate manual data entry in invoice processing and automatically performs three-way matching of purchase orders, shipping documents and supplier invoices. This helps reduce errors, increase productivity and foster healthy relationships between accounting teams and suppliers. Similarly, *NetSuite Analytics Warehouse* provides faster access to analysis and reporting, using AI capabilities. Accounting teams can access real-time data from within NetSuite systems and other sources, including CRM and ecommerce platforms, to gain deeper, quicker and more actionable business intelligence. The included customizable dashboards and intuitive report builder put the power of AI into accountants' hands with a short time to value.

Businesses stand to gain significant benefits from integrating AI into accounting processes. Key among them are cost savings, scalability, enhanced accuracy, improved compliance and fraud detection, better forecasting and customer service, and enhanced decision support. For accounting teams, AI's automation of routine and time-consuming tasks frees them to focus on higher-value activities that make sure of their expertise for strategic analysis, problem-solving and strategic decision-making. AI also empowers them by analyzing massive datasets, using predictive analytics and assisting with project management and business communications. It's a seismic shift that's exciting and new, with the potential to help accounting teams achieve new levels of influence and success.

AI in Accounting FAQs

Will AI replace accountants?

Artificial intelligence (AI) may have the potential to replace low-level accounting clerks as it automates routine tasks, such as data entry. However, accountants with the right skills and mindset will continue to be valuable assets to their organizations. AI will be an important tool used by accountants as they evolve from being transactional to more value-based.

> "AI integration in accounting improves scalability, allowing processes to grow alongside the business while mitigating challenges like staffing shortages and burnout."

How is AI being used in accounting?

There are many use cases for artificial intelligence (AI) in accounting, including helping to improve forecasting, scheduling, invoice processing, business communications and workflow management. AI can also help assess audit risk and work as an alternative to audit sampling.

Is AI going to replace accounting?

Accounting won't go away or be replaced by artificial intelligence (AI). However, AI is changing the way in which accounting work is performed and enhancing modern accounting software.

Which accounting firms use AI?

Accounting firms use artificial intelligence (AI) as part of various client services, including bookkeeping services, tax preparation and financial audits. The "big four" public accounting firms — Deloitte, EY, PwC and KPMG — have been leading the way. Small and midsize accounting firms, meanwhile, have begun using AI for research, tax return preparation and bookkeeping services.

Can GenAI be used in accounting?

Generative artificial intelligence (GenAI) is a form of artificial intelligence that can produce unique content, more closely mirroring human capabilities. The key difference between GenAI and traditional AI is the former's ability to generate its own output, whereas traditional AI operates on predefined responses or learned patterns. GenAI can be used in accounting as another progression to streamline operations, enhance communications and extract valuable insights from large datasets.

About Rebeca Bichachi

Rebeca Bichachi is a Product Marketing Specialist for the Oracle NetSuite Global Business Unit. She is responsible for driving the go-to-market messaging and positioning for NetSuite accounting related solutions. Rebeca is a licensed CPA in the state of Florida and has 10 years of experience in the accounting industry. Prior to this role, Rebeca served as the Manager of Operations at a boutique public accounting firm in South Florida and as a contractor for the Global Controllers Organization-Latin America Division at Oracle. Rebeca's areas of specialized expertise include accounting software and business analytics.

About Oracle NetSuite

For more than 25 years, Oracle NetSuite has helped organizations grow, scale, and adapt to change. NetSuite provides an integrated system that includes financials / Enterprise Resource Planning (ERP), inventory management, HR, professional services automation and omnichannel commerce, used by more than 37,000 customers in 219 countries and dependent territories.

ORACLE
NETSUITE

Article by Rebeca Bichachi

Driving ERP Innovation: A Q&A with Jeremy Larsen, Vice President of Product Management at Acumatica

Acumatica's recent 2024 R2 release represents a significant leap forward in the ERP landscape, blending cutting-edge AI capabilities with customer-driven enhancements. With over 350 updates tailored to meet the evolving needs of SMBs across industries, this release underscores Acumatica's commitment to innovation, usability, and customer satisfaction.

In an exclusive Q&A with ERPNews, Jeremy Larsen, Vice President of Product Management at Acumatica, provides valuable insights into the motivations behind the 2024 R2 update, its groundbreaking features, and the company's strategic vision for the future. From AI-powered reporting to enhanced integrations with Amazon and Shopify, discover how Acumatica is shaping the ERP market and empowering businesses to succeed in a competitive digital era.

1. What specific customer feedback drove the development of the 2024 R2 update, and how did it shape the new features?

2024 R2 is a direct reflection of the insights and requests we've gathered from our customer base. With over 350 enhancements, our development process was guided by feedback from our 26,000+ community members which includes customers and partners. Our customers consistently voiced a need for greater automation, enhanced user experience and more robust integrations. This feedback influenced major features like our new AI engine to power advanced reporting and analytics and deeper integrations with popular e-commerce platforms. Additionally, the growing need for tailored ERP solutions for Professional Services companies spurred the development of our new Professional Services Edition.

Interview with
Jeremy Larsen
Vice President of Product Management, *Acumatica*

Acumatica
The Cloud ERP

2. How does the new AI engine enhance your reporting and analytics capabilities, and what advantages does it bring to data management?

The new AI engine is powering the new anomaly detection capability in our General Inquiry that helps users quickly identify irregularities in data without manual oversight. This feature scans through large datasets, flags potential discrepancies and alerts users to outliers or patterns that might require further investigation. The advantage lies in time-saving and precision—by proactively surfacing anomalies, teams can manage their data more effectively, reduce errors and focus on higher-value tasks instead of spending time on routine checks.

3. Could you elaborate on the new Amazon and Shopify integrations, and how they benefit SMBs in retail and distribution?

The Amazon and Shopify integrations provide small and mid-sized businesses (SMBs) in retail and distribution with seamless connectivity between their e-commerce platforms and Acumatica. Our new release brings more to businesses looking to expand their eCommerce capabilities. Users can now streamline Amazon returns, exchanges and refunds and improve competitive positioning with volume pricing and quantity rules for Shopify. Ultimately, this allows SMBs to scale efficiently, effectively manage multiple sales channels and deliver a better customer experience.

> "2024 R2 is a direct reflection of the insights and requests we've gathered from our customer base. With over 350 enhancements, our development process was guided by feedback from our 26,000+ community members, focusing on greater automation, enhanced user experience, and robust integrations."

4. How does the updated user interface improve personalization, and what impact does this have on team collaboration?

Our new, modern user interface offers enhanced personalization options, allowing users to tailor their dashboards, workflows and reports based on their specific needs and roles. This level of customization fosters better collaboration by enabling teams to access and share the most relevant information quickly. Teams can now collaborate more effectively by working within a unified platform that's tailored to their unique roles, ensuring that the right data is accessible at the right time.

5. What industry-specific enhancements were introduced, and which sectors stand to benefit the most from these updates?

The 2024 R2 update introduces key enhancements across several industries, including construction, manufacturing, distribution and retail. For instance, construction firms benefit from efficiency-boosting capabilities that accelerate time to payment like on-demand pro forma invoice creation. Meanwhile, distributors can now manage operations more seamlessly, optimize returns and streamline procure-to-pay activities with sales order anomaly detection. Manufacturers experience new features that enhance cost-efficiency such as a new estimate worksheet to create competitive quotes by amortizing one-time costs across multiple quantities.

6. How does Acumatica balance advanced functionality with user-friendliness, especially with the 2024 R2 enhancements?

Acumatica has always prioritized delivering powerful features without compromising on usability. In the 2024 R2 release, we've maintained this balance by offering advanced capabilities—like AI-driven insights and industry-specific integrations—through an intuitive interface. Our new user interface includes features like a personalized dashboard that allows users to access sophisticated functionality while maintaining a user-friendly experience that requires minimal training or technical expertise.

7. Are there any unique challenges in construction, manufacturing, or distribution that the new features address?

Yes, the 2024 R2 release addresses several industry-specific challenges. In construction, streamlined billing processes and improved field services appointment editing enhance collaboration between

field teams and back-office staff. For manufacturers, streamlined purchase order processing helps optimize workflow, and distributors benefit from two-step receiving verification for improved quality and receipt error reduction. These product enhancements were created to address the real-world needs of our customers.

> "The new AI engine is powering the anomaly detection capability in our General Inquiry, helping users quickly identify irregularities in data without manual oversight. By surfacing anomalies proactively, teams can manage data more effectively, reduce errors, and focus on higher-value tasks."

8. How does this release enhance Acumatica's competitive positioning in the ERP market?

The 2024 R2 release further cements Acumatica's position as a leading ERP solution, especially for SMBs. By incorporating hundreds of customer-driven enhancements, AI-powered capabilities and expanded integrations, we offer impressive flexibility, scalability and value. This release highlights our commitment to innovation while ensuring that our solution remains accessible and practical for growing businesses, giving us a competitive edge in a rapidly evolving market.

9. What has been the response from early adopters of the 2024 R2 release, particularly concerning the AI and UI updates?

Early adopters of the 2024 R2 release have been highly positive. Customers are excited about the new AI engine for making data management more efficient and proactive. The enhanced UI has also received great feedback for improving workflow customization and team collaboration. The overall sentiment is that the new features are intuitive, user-friendly and add real value to their day-to-day operations.

> "The 2024 R2 release further cements Acumatica's position as a leading ERP solution for SMBs by incorporating hundreds of customer-driven enhancements, AI-powered capabilities, and expanded integrations, offering impressive flexibility, scalability, and value."

10. What future trends or customer needs is Acumatica considering as it plans for upcoming updates?

As we plan for future updates, we're focused on continuing to deliver solutions that address our community's unique business goals and challenges. Customer needs continue to evolve around scalability, ease of use and industry-specific functionality. We will also evolve our solution to anticipate what's possible 3-5 years from now when ERP technology will be more assistive, intuitive and human-like based on technical advancements in AI and machine learning. Our goal is to not only meet current challenges but also anticipate future needs and possibilities in a way that allows us to continue to provide innovative, customer-driven solutions that empower businesses to succeed and grow on their own terms.

Acumatica
The Cloud ERP

About Acumatica

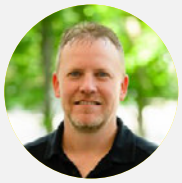
Acumatica Cloud ERP is a comprehensive business management solution that was born in the cloud and built for more connected, collaborative ways of working. Designed explicitly to enable small and mid-market companies to thrive in today's digital economy, Acumatica's flexible solution, customer-friendly business practices and industry-specific functionality help growing businesses adapt to fast-moving markets and take control of their future. For more information, visit acumatica.com or follow us on LinkedIn.

How To Achieve Perfect Physical Inventory in 10 Easy Steps

Next time you meet someone in manufacturing ask them about their job.

Most of the time they will smile and their eyes will light up as they tell you about the sounds, smells, precision and skill it takes to make a part. Then ask them what they dread about their job and most of them will smile, laugh, and give you an eye roll as they say, "doing physical inventory."

Physical inventory is the process a manufacturer goes through to count their entire inventory. Often, physical inventory is a requirement to achieve certain certifications or a financial or tax requirement. In many occasions, manufacturers that make parts for the government or defense contractors are required to perform physical inventory regularly.



Whitepaper by
Brady Stevens,
Senior Consultant
Global Shop Solutions

> "We are regularly audited on our inventory control processes to ensure everything is accounted for. Without Global Shop Solutions, that process would be next to impossible."
>
> -Mary Bly,
> Inventory Accountant,
> Matech Solutions

Physical inventory can often be referred to as the necessary evil of manufacturing. It is critical to perform this accurately in order to be profita ble and deliver a quality part on-time every time. Over the years we have developed 10 steps to achieve perfect physical inventory.

1. Prepare and Plan Ahead.

Taking physical inventory can be an unwelcoming and daunting task requiring you to be prepared with adequate resources. Any lack of preparation or employee support may lead to a failed physical inventory.

I recommend an "all hands on deck" approach that will ensure you have enough people available to count.

It is much easier and a bigger morale booster to send someone home than it is to call someone in last minute. We recommend setting expectations early and discourage employees from taking personal time off on the day of the "big count." Small morale and team building boosters like ordering in lunch help keep the team focused on the task at hand. Create "Inventory Teams" and pair two employees per team. Pairing up as teams allows one person to scan and input the counts as the second person actually does the counting of the parts. Creating these two-person teams is also a way to build comradery between employees, especially those that may not have the opportunity to spend time together.

2. Identify Your Inventory.

Keeping your inventory labeled is an important step in controlling your inventory between physical inventories.

It is important to make sure the practice of *labeling* your inventory is not just done when you prepare/ take a physical inventory. Labeling ensures that employees can identify the correct inventory when consuming it into jobs or shipping to customers. Barcode labeling in Global Shop Solutions helps make the job manageable. Global Shop Solutions has a built in integration with CODESOFT barcode labels that can be printed as transactions are being performed in the system as well as a partnership with *EMS Barcode* for your hardware. System-generated inventory labels eliminate hard to read, hand-written labels. The barcodes enhance the labeling experience by allowing mobile transactions to be performed in real time on the shop floor or the warehouse where inventory is stocked.

3. Freeze Transactions and Inventory Movement.

Taking physical inventory is a challenging process in itself, but chasing a moving target must be avoided. Inventory movements need to be frozen during the counting process with no exceptions.

4. Minimize Downtime (Time Is Money).

Long gone are the days where you had to print a count sheet and handwrite down the counts, collect inventory tags, and input the counts into the system.

When it comes to taking a physical inventory with Global Shop Solutions ERP software, count teams can quickly and easily record their counts wirelessly by scanning barcode labels and recording electronic counts direct into the Global Shop Solutions physical inventory system through our GS Mobile software. This process can drastically reduce the physical inventory count time from start to finish by at least half, as well as improve the accuracy of the counting process.

> "We saved thousands of dollars and hundreds of hours of labor time with Global Shop Solutions by not having to shut down for two whole weeks while we count inventory."
>
> -Marie Yates,
> IT Manager,
> Mum Industries

5. Accuracy Is Important.

What is the point of a physical inventory if the counts are not correct or can't be trusted?

Inventory accuracy starts with ensuring physical counts are taken with confidence. Barcode labels and scanning barcodes help ensure the right counts are recorded for the right part. Similar parts are correctly identified and recorded in the count.

6. Monitor Counts.

"Inspect what you expect."
The management team should be available to help with any inquiries on the floor as they arise.

They should also make sure the integrity of the counts are maintained. It doesn't hurt to perform some spot checks on how the teams are counting to ensure accuracy. When it comes to company audits, spot checks are normal. Prepare yourselves by performing this activity.

7. Identify What Has Been Counted.

Implement a method to mark off or flag an area that has been counted. There is no right or wrong way of doing this.

For example, some companies will tape off sections with brightly colored tape. With GS Mobile Physical Inventory, you can print physical inventory labels as you scan and count the inventory. With a handheld scanner and wireless hip printer, counting and tagging counts are made simplified and efficient.

8.Review Count Variances Closely.

Using the GS Mobile physical inventory process, the physical inventory count variances can be reviewed from a physical inventory variance report generated from the system. This report can be printed at any time during the count. Material variances should be identified and discrepancies double-checked.

9. Commit Counts.

Once the count is verified and confirmed accurate, commit the count changes to the inventory system.

10. Open For Business.

Now everyone can get back to making and shipping parts with accurate inventory numbers.

With GS Mobile physical inventory and CODESOFT barcode Inventory labels, physical inventory does not have to be a painful process but yet a welcomed bi-annual or annual event.

"Using the GS Mobile physical inventory process, the physical inventory count variances can be reviewed from a physical inventory variance report generated from the system."

Achieve Perfect Physical Inventory In 10 Easy Steps

Use the following checklist as a quick reference guide to achieve perfect physical inventory.

1. Prepare and Plan Ahead
2. Identify Your Inventory
3. Freeze Transactions and Inventory Movement
4. Minimize Downtime (Time is Money)
5. Accuracy is Important
6. Monitor Counts
7. Identify What Has Been Counted
8. Review Count Variances Closely
9. Commit Counts
10. Open for Business

About Brady Stevens
Brady Stevens is a Project Manager for new implementations as well as the manager of GS Mobile and barcode/RFID rollouts at Global Shop Solutions. He works with new and existing customers to help simplify processes. His accounting and technical backgrounds provide a toolkit that is valuable for customers looking to incorporate controls into their processes around mobile materials management and barcode/ RFID labeling solutions.

About Global Shop Solutions
Global Shop Solutions ERP software provides the applications needed to deliver a quality part on time every time from quote to cash and everything in between including shop management, scheduling, inventory, accounting, quality control, CRM and 25 more. Available in the cloud or on premise, our manufacturing customers benefit from real-time inventory accuracy, improved on-time delivery, lower administrative costs, increased sales and improved customer service. Headquarters in The Woodlands, Texas includes a state-of-the-art R&D facility and Global Shop Solutions training center. Through its offices in the U.S., Mexico, Indonesia, Singapore, Australia, New Zealand and the United Kingdom, the company supports thousands of manufacturing facilities in over 25 countries and more than 30 industries. For more information please visit globalshopsolutions.com.

Global Shop SOLUTIONS

How To Leverage AI in ERP, Supply Chain, and Finance

According to a report by Statista, the global artificial intelligence market is expected to reach approx $243 billion by 2025. This significant business growth underscores the rapidly increasing influence of AI across various business sectors. Companies that harness AI-enabled ERP systems are not only automating routine tasks but are gaining actionable insights that lead to smarter strategic decisions.

In the realms of AI in ERP systems, AI applications in supply chain, and AI application in finance, the integration of AI is proving to be a game-changer. Generative ai in erp enhances operational efficiency, streamlines business processes, reduces costs, and improves accuracy in forecasting and inventory management. For instance, a recent survey revealed that 60% of supply chain executives reported using AI applications in supply chain operations to enhance demand forecasting, which directly impacts inventory levels and operational costs.

The purpose of this article is simple, to equip business leaders and decision-makers with actionable strategies for effectively leveraging AI powered ERP systems, supply chain, and finance functions. By understanding practical applications and benefits, organizations can drive innovation and stay competitive in an increasingly digital landscape. Additionally, the integration of AI in banking & finance ensures improved accuracy, fraud detection, and user satisfaction, further revolutionizing the financial sector.

Understanding AI in Business

The AI market is set to expand rapidly, with forecasts indicating a CAGR of 42.2% from 2020 to 2027. Its adoption is crucial across sectors, especially in ERP systems, ai applications in supply chain, and ai application in finance. Understanding artificial intelligence begins with its core components.

Artificial Intelligence (AI) simulates human intelligence in machines designed to think and learn. Key technologies include Machine Learning (ML), Natural Language Processing (NLP), and Computer Vision.

> "The global artificial intelligence market is expected to reach approximately $243 billion by 2025, underscoring AI's rapidly increasing influence across various business sectors."

Generative AI in ERP and Machine Learning allow systems to analyze data, recognize patterns, and make decisions independently, which is invaluable for demand forecasting and inventory management. Natural Language Processing enables machines to comprehend and generate human language, enhancing customer service through chatbots. Computer Vision extracts information from images, vital for quality control in manufacturing by identifying defects.

AI improves decision-making and efficiency across business functions. Real-time data analysis helps companies make informed decisions swiftly. In finance, AI in banking & finance detects unusual transactions for fraud prevention. In AI applications in supply chain, predictive analytics optimize logistics and inventory, lowering costs and improving customer satisfaction.Read Also: *Is AI the Future of Manufacturing? Discover the $2 Trillion Impact on Industry*

The Intersection of AI and ERP Systems

Enterprise Resource Planning (ERP) systems play a critical role in modern businesses by consolidating data and processes across various departments into one cohesive framework. As of 2023, the global ERP market reached approximately $47 billion, reflecting the growing reliance on integrated systems for efficiency and responsiveness.

Integrating artificial intelligence (AI) into ERP systems enhances their capabilities significantly, leading to various benefits:

- ***Enhanced Data Analytics and Predictive Reporting:*** AI tools can analyze vast amounts of datasets collected via ERP systems to uncover deeper insights that traditional methods may miss, allowing for quicker and more accurate data-driven decisions.
- ***Improved Demand Forecasting and Supply Chain Visibility:*** AI algorithms analyze historical sales data and market trends to predict future customer demand. This results in better inventory management by minimizing surplus and shortages, and enables timely adjustments to supply chain disruptions.
- ***Automation of Repetitive Tasks:*** AI can automate routine tasks like data entry and report generation, freeing employees to focus on strategic initiatives, thus enhancing productivity and reducing operational costs.

Real-World Case Studies:

- **Siemens** achieved a 15% increase in manufacturing efficiency by streamlining processes with AI insights.
- **Adobe** enhanced customer satisfaction through predictive insights derived from user interactions within its ERP system.
- **Coca-Cola** utilized AI for granular demand forecasting, leading to improved supply chain efficiency.

In conclusion, integrating AI into ERP systems offers substantial opportunities for enhancing operations and maintaining competitive advantages. Embracing these technologies enables organizations to unlock their data's full potential and streamline workflows efficiently.

Transforming Supply Chain Management with AI

The supply chain management landscape is experiencing a revolutionary change, largely driven by AI applications in the supply chain. A study by McKinsey reveals that businesses leveraging AI can boost their profitability by up to 20%. This statistic highlights the crucial role AI in ERP systems plays in tackling challenges faced by supply chain professionals, particularly in managing demand fluctuations and operational inefficiencies.

Addressing Supply Chain Challenges

Unpredictable demand patterns and varying lead times often lead to surplus inventory or stockouts. Traditional forecasting methods can falter in the rapidly changing market, leading to costly errors. Additionally, operational inefficiencies arise from inadequate visibility within the supply chain, complicating responses to disruptions. By integrating generative AI in ERP, businesses can achieve better visibility and proactive management, reducing such inefficiencies significantly.

Benefits of AI in Supply Chain Management

AI presents numerous solutions to these challenges:

- ***Predictive Analytics for Precise Demand Forecasting:*** Leveraging historical data and market trends, AI algorithms provide accurate demand predictions, empowering companies to maintain optimal product levels.
- ***Intelligent Inventory Optimization:*** AI enhances inventory management by analyzing data to recommend ideal stock levels, reducing waste and improving financial outcomes.
- ***Risk Management:*** AI-driven insights identify vulnerabilities within the supply chain, such as supplier risks and geopolitical factors, enabling businesses to create effective contingency plans.

"A study by McKinsey reveals that businesses leveraging AI can boost their profitability by up to 20%, highlighting the transformative impact of AI in supply chain management."

Revolutionizing Financial Processes with AI

The financial services sector is rapidly evolving, with a projected value of $28 trillion globally by 2025, according to McKinsey & Company. As finance moves into the digital era, Artificial Intelligence is becoming an essential tool in reshaping financial operations.

Key Benefits of AI in Financial Operations

- ***Automating Accounting Tasks:*** AI applications in finance streamlines routine accounting processes by automating data entry, invoice processing, invoice management, and reconciliation. This not only saves time but also reduces human error, leading to more accurate financial reporting. With AI-driven software, finance teams can focus on strategic tasks rather than getting bogged down in day-to-day operations.

- ***Fraud Detection and Prevention:*** Traditional fraud detection methods struggle to keep pace with increasingly sophisticated cyber threats. Ai in banking & finance employs machine learning algorithms to analyze transaction patterns in real time, flagging anomalies that may indicate fraudulent activities. By utilizing AI for fraud detection, financial institutions enhance their security measures, minimizing losses and building customer trust.

- ***Enhancing Customer Insights:*** AI provides financial firms with the ability to gather and analyze extensive customer data, offering valuable insights that were previously inaccessible. By understanding customer behavior and preferences, AI application in finance enables firms to create personalized financial services, tailoring their offerings to meet individual needs. This level of personalization not only boosts customer satisfaction but also fosters loyalty.

The integration of AI into financial operations is not just a technological upgrade, it's a strategic imperative that allows businesses to adapt quickly to changing market conditions while driving efficiency and growth. As the industry continues to embrace these advancements, the focus will shift towards harnessing AI's full potential to redefine financial processes for the better.

Implementation Strategies for AI Integration

With the increasing demand for efficiency, a McKinsey study indicates that companies utilizing AI could boost profitability by 5-10%. Effectively integrating AI into ERP, supply chain, and finance systems is essential. Here are key strategies for successful AI implementation.

Identifying Areas for AI Integration

Businesses must identify specific areas for improvement to leverage AI in ERP systems effectively. Opportunities often include automating routine data entry and processing in data management, enhancing demand forecasting through AI applications in supply chain, and optimizing cash flow management with AI application in finance. A thorough analysis of current processes aids in discovering inefficiencies and potential enhancements.

Criteria for Evaluating AI Tools

Choosing the right AI tools is critical. When assessing options, organizations should prioritize scalability to ensure solutions can adapt and grow with the company. Compatibility is essential for seamless integration with existing systems, while usability ensures higher staff adoption rates. Leveraging generative AI in ERP can address these considerations effectively. A comprehensive evaluation helps align selected technologies with business objectives.

Best Practices for Implementation

Successful AI integration requires adherence to best practices. First, managing organizational change is crucial to clearly communicate AI benefits to stakeholders and involve teams during the transition. Training sessions will equip staff with the necessary skills for the new systems. Second, continuously monitor AI performance against key performance indicators (KPIs) for ongoing improvement.

Lastly, partnering with technology providers can offer expert support during integration, ensuring a smoother transition. By following these strategies, organizations can effectively implement AI in ERP systems, AI applications in supply chain, and AI application in finance, unlocking new efficiencies and enhancing overall performance.

Challenges and Considerations

As organizations increasingly turn to AI in ERP systems (Enterprise Resource Planning) to transform their supply chain processes and finance operations, they encounter several hurdles. A recent Deloitte survey found that 83% of businesses cite data quality as a critical barrier to effective AI deployment. Additionally, integrating AI into existing systems can be complex and resource-intensive, often requiring specialized expertise.

Data Quality and Integration Complexities

AI systems rely heavily on clean, accurate data. Poor data quality can lead to misleading insights and faulty decisions. Organizations must invest in data cleansing and management solutions to ensure seamless data flow across platforms. This initial investment is vital for validating AI outputs, especially in areas like AI in banking & finance, where precision is paramount.

> "AI-powered ERP systems enhance operational efficiency, automate routine tasks, and provide actionable insights, allowing businesses to make smarter strategic decisions."

Resistance to Change

Cultural resistance poses a significant challenge, as employees may fear job displacement or lack the necessary skills to work alongside AI tools. Addressing these concerns is crucial. Organizations should promote a culture of innovation by communicating the benefits of generative AI in ERP and providing comprehensive training, ensuring a workforce adaptable to technological changes.

Ethical and Compliance Considerations

Navigating the ethical landscape surrounding AI use plays an increasingly crucial role. Companies must adhere to regulations regarding data privacy and usage, particularly in finance. Establishing guidelines for ethical AI practices can prevent legal issues and build stakeholder trust. Regular audits and frameworks outlining responsible AI usage are essential.

Practical Strategies for Overcoming Challenges

To effectively tackle these challenges, companies can implement phased strategies. Starting with pilot programs allows organizations to test AI capabilities on a smaller scale before broader deployment. Aligning stakeholders from IT to upper management ensures a shared understanding of the integration vision, easing anxiety and fostering collaboration.

Read More: *Incredible Benefits of Artificial Intelligence in Website Development*

Future Trends: AI in Business Operations

The landscape of AI technologies is rapidly shifting, with the global AI market projected to reach $190 billion by 2025, showcasing an annual growth rate of over 30%. This surge is not just a trend; it's a pivotal moment for business operations, particularly in areas like ERP, supply chain, and finance. Companies that harness these technologies will gain a significant competitive edge.

AI-Powered Autonomous Systems

One of the most promising trends on the horizon is the rise of AI-powered autonomous systems. These

systems can streamline routine tasks, such as order processing and inventory management, without manual intervention. For instance, autonomous robots in warehouses are already improving efficiency by reducing the time required to fulfill orders. As these technologies become more sophisticated, businesses will increasingly rely on them for precision and speed.

Real-Time Analytics

The demand for real-time analytics is surging as organizations acknowledge the need for instant real-time insights. In finance, this means being able to anticipate cash flow issues, enabling proactive decision-making. In supply chain management, real-time data can optimize logistics and enhance demand forecasting. Companies that invest in AI-driven advanced analytics tools will be better equipped to respond to market shifts, supply disruptions, and consumer behavior changes.

Continuous Learning and Adaptation

To remain competitive, businesses must embrace a culture of continuous learning and adaptation. AI technologies evolve quickly, and staying updated with advancements is crucial. Companies should cultivate a proactive approach to training their workforce, ensuring that employees possess the skills necessary to leverage new AI tools effectively. Engaging in partnerships with AI solution providers can also foster innovation and facilitate knowledge sharing within organizations.

Embracing the Future

As AI becomes integral to business operations, organizations must strategically plan their implementations to harness its full potential. Future trends indicate that those who prioritize AI adoption today will pave the way for operational efficiency and enhanced decision-making tomorrow. By staying informed and adaptable, businesses can navigate the complexities of the evolving AI landscape and position themselves as leaders in their industries.

> "Integrating AI into financial operations is not just a technological upgrade; it's a strategic imperative that enables businesses to adapt quickly, improve fraud detection, and drive efficiency and growth."

Conclusion

In conclusion, leveraging AI in ERP systems, supply chain, and finance offers businesses significant opportunities to boost operational efficiency and enhance decision-making. Implementing AI-powered autonomous systems, such as those utilizing generative AI in ERP, can streamline routine tasks, minimize human error, and elevate overall productivity. The integration of real-time analytics empowers organizations to respond quickly to market changes and facilitates proactive financial management through AI application in finance.

Cultivating a culture of continuous learning is crucial, ensuring that employees are equipped to adapt to new technologies, including AI applications in the supply chain that optimize logistics and demand forecasting. Staying engaged with *AI solution providers* fosters innovation and supports knowledge sharing within teams, enabling the seamless integration of AI in banking & finance for enhanced fraud detection and customer insights.

By prioritizing AI adoption now, companies are not only optimizing their current processes but also positioning themselves for sustainable success in competitive markets. Embracing AI is essential for those looking to thrive in the future, as it goes beyond mere trend as a strategic move that drives significant growth.

To begin your journey in integrating AI in ERP systems and transforming your operations, contact CISIN today! Together, we can unlock the full potential of AI applications in supply chain and AI applications in finance, confidently navigating the future of business with innovation and foresight.

CIS
We make IT possible!

A New Year, A New Chapter – 10 Manufacturing Trends for 2025

The manufacturing sector is entering (another) transformative phase, shaped by both retrospectives from recent disruptions and opportunities brought by rapid technological innovation.

Since manufacturers have been steering complex global demands since as early as the industrial revolution, 2025 is no different, as it brings forward trends that prioritize efficiency, sustainability, and adaptability.

From rethinking production processes to leveraging advanced tools that integrate seamlessly with human expertise, the focus is on creating systems that can meet challenges like maintaining production efficiency amid fluctuating supply chains, reducing environmental impact to align with stricter sustainability regulations, and adapting to increasingly complex consumer demands for personalized products delivered faster than ever.

Manufacturers also face the ongoing need to balance the integration of new technologies —with the upskilling of their workforce to operate and maintain these systems.

Article from Priority

1. Digital transformation shaping Industry 4.0

Digital transformation is the driving force behind Industry 4.0, integrating advanced technologies like IoT, AI, and cloud computing into manufacturing.

Digital transformation has become the buzzword for everything related to Industry 4.0, and as of late, even the newly-forming Industry 5.0. It represents a broad concept that focuses on embedding digital tools into every layer of the manufacturing operations to create interconnected ecosystems where data flows seamlessly across processes, rather than simply introducing isolated technological tools.

> "AI and machine learning integration in manufacturing has advanced beyond isolated automation to enable dynamic, adaptive systems that respond to real-time variables."

In other words, factories are realizing that they are no longer static production hubs, but that they are becoming dynamic environments that require a strategic rethinking of how every element of manufacturing interacts, communicates, and evolves, instead of "just" automating production or implementing smart machines.

This digital-first approach fosters the adoption of various technologies and methods to drive innovation, streamline operations, and strengthen adaptability to position businesses to meet current challenges and future demands with confidence, in 2025 and beyond.

2. AI and machine learning integration

AI and machine learning integration in manufacturing has advanced beyond isolated automation to enable dynamic, adaptive systems that respond to real-time variables. Unlike 2024, where AI tools were mostly implemented to serve the purpose of predictive maintenance or process optimization within fixed parameters, 2025 shifts toward systems capable of real-time self-optimization across entire production ecosystems, fostering a more collaborative, human-centric approach.

This includes advanced process control (APC) that adjusts operations dynamically based on live sensor data, adaptive supply chain planning that reacts instantly to disruptions, and *smart QA and quality management systems* that refine production outputs without human intervention, enabling mass customization at scale and supporting cognitive manufacturing, where machines not only respond to pre-set conditions but also reason, learn, and adjust to evolving circumstances with greater precision and agility.

3. Industrial IoT powering smart factories

Industrial IoT (IIoT) remains a trend going into 2025 as its implementation shifts from isolated device connectivity for tracking machine performance or implementing predictive maintenance to fully integrated, real-time operational ecosystems.

Now, IIoT utilization is advancing to the creation of seamless data flows, known as digital threads, that connect the entire process, from design and production to supply chains and maintenance.

These threads give manufacturers real-time insights into resource usage, equipment performance, and potential bottlenecks, allowing them to address issues quickly and efficiently.

With advanced IIoT technologies like high-precision sensors, edge computing devices, real-time analytics platforms, and digital twins, manufacturers can achieve a level of operational insight and responsiveness that wasn't possible before, improving efficiency and collaboration.

> "To truly lead, manufacturers must be willing to take the risk of stepping out of their legacy comfort zones and embrace change in the form of new technologies, as clinging to outdated tools and systems can stifle growth and limit their competitiveness."

4. Sustainable manufacturing practices advancing green manufacturing

Sustainability is now a staple component in the strategy of any manufacturing unit, driven by both regulatory requirements like the EU Green Deal, which mandates carbon neutrality by 2050, or California's stricter emission standards that require manufacturers to report and reduce greenhouse gases, and increasing demand for eco-friendly products, such as goods made with sustainable materials or minimal packaging, and transparency about manufacturing practices like ethical sourcing and reduced carbon footprints.

This trend is being accelerated by new IT-driven technologies like advanced energy management systems (EMS), which use real-time data to optimize energy consumption across facilities, and AI-driven lifecycle analysis tools that assess the environmental impact of products from design to disposal.

Technologies like AI and IIoT are driving improvements in energy efficiency by identifying areas of waste and implementing solutions to conserve resources. At the same time, the emphasis is shifting toward using recyclable materials and embracing eco-friendly production approaches, such as the circular economy, which prioritizes designing products for reuse, repair, and recycling.

5. Advanced robotics automating production workflows

Advanced robotics is a major trend in 2025 manufacturing as it moves beyond basic automation to take on more complex, strategic roles while fostering collaboration between humans and machines.

The focus is on enhancing, not replacing, human capabilities, allowing workers to shift toward more strategic initiatives.

Key technologies driving this trend include collaborative robots (cobots) that safely share tasks with humans to improve efficiency, machine vision systems that inspect and sort materials with precision for quality control, and flexible resource planning systems that automate and reconfigure processes for agile production, enhancing human and equipment performance.

6. Upskilling the workforce preparing for smart factory demands

As technology reshapes manufacturing, the workforce must evolve alongside it.

In 2025, with the turbo-rise in the adoption on AI-driven automation, Industrial IoT (IIoT), and robotics, smart factories demand a more technically proficient staff to operate these systems, as these require workers who can manage and interpret real-time data, program and troubleshoot complex machinery, and collaborate with automated systems in hybrid workflows, making traditional skill sets insufficient.

Workforce development programs initiatives will take precedence, focusing on equipping workers with the knowledge to operate and maintain systems such as advanced *ERP platforms*, predictive maintenance tools, smart manufacturing execution systems (MES), autonomous guided vehicles (AGVs), and augmented reality (AR) tools for machine diagnostics and training.

To meet these demands, companies will probably offer more training programs to bridge the skills gap and help employees stay up to date with new technologies. At the same time, they will prioritize adopting easy-to-use systems that flatten the learning curve and make it simpler for workers to adapt.

7. Digitalizing supply chains

The requirement for *supply chain digitization* is driven by the need for increased visibility, agility, and efficiency in response to global market challenges like fluctuating demand, global supply chain disruptions, rising transportation costs, regulatory compliance requirements, and the growing pressure for sustainability and ethical sourcing.

Manufacturers will start to prioritize precision, connectivity, and responsiveness over functionality and will rely more on interconnected supply chain ecosystems that integrate real-time data from production lines, transportation networks, and global suppliers.

Web-based portals and collaborative platforms will become more popular, enabling seamless coordination across all – even 3rd party stakeholders, while AI-enabled, sophisticated *WMS systems* will provide insights into inventory levels, shipment conditions, and delivery timelines to improve inventory accuracy and allow complete traceability and transparency, creating a new standard for operational interconnectivity.

8. Digital twin technology enabling smarter operations

Digital twin is the term for exact digital replicas of physical assets, processes, and systems within a digital environment that mirrors real-world conditions.

In 2025, digital twins are expected to make manufacturing operations more efficient and cost-effective, as virtual commissioning of new machines and systems will let manufacturers test and refine setups in a digital environment, cutting down on errors and delays during implementation and real-time monitoring and predictive maintenance will become more precise, helping to reduce downtime and extend equipment lifespan.

Digital twins methodology adoption will also speed up product development by enabling rapid prototyping and testing of designs before committing to a structure.

9. Adopting a cloud infrastructure for manufacturing scalability and flexibility

Yet again, cloud technologies continue to top the charts in terms of manufacturing trends. Now, even more than ever, with the rise of cloud-enabled technologies that require extensive processing power, like gen-AI and big data analytics, manufacturers are realizing there is a limit to their in-house capacity, which drives the change in their approach towards scalability and resource management.

While the manufacturing industry is notorious for the persistence of legacy systems, manufacturers will have no choice but to jump on the wagon and, at the very least, start rerouting their on-prem systems to the cloud.

10. Cybersecurity as a cornerstone of smart manufacturing

Cybersecurity is becoming a top priority in manufacturing as we move into 2025, as factories are becoming more digital and interconnected, and this, by default, renders heightened vulnerability.

In 2025, we can expect that the industry will enhance its data management and security, especially as it builds upon realizing the potential of AI tools.

For manufacturing and industrial organizations, securing the IoT devices is vital. Based on research from *PSAcertified*, the average cost of a successful attack on an IoT device exceeds $330,000. *Forrester's report* reveals that 34% of enterprises that fell victim to a breach via IoT faced higher cumulative costs than cyberattacks on non-IoT devices, ranging between $5 million and $10 million.

The 2025 cybersecurity budget for manufacturers will probably include significant allocations for specialized threat detection and security solutions in these environments. The *IEC 62443* standards provide a comprehensive framework for industrial cybersecurity, setting requirements and processes for implementing secure industrial automation and control systems (IACS), which will become increasingly important for manufacturing and industrial enterprises to comply with government regulations and protect against threats.

Final thoughts – Nothing ventured, nothing gained

Heading into the new year, as manufacturers adapt to new realities, from exponentially growing AI dependency and IoT connectivity, the trends of 2025 spotlight a sector that embraces innovation like digital twins, advanced robotics, and supply chain digitization to address complex challenges, and transform production into more connected, agile, and efficient ecosystems that can meet modern demands head-on.

To truly lead, manufacturers must be willing to take the risk of stepping out of their legacy comfort zones, and embrace change in the form of new technologies, as clinging to outdated tools and systems can stifle growth and limit their competitiveness.

The *2024 Gartner® Hype Cycle™ for ERP* underscores this, highlighting the growing importance of AI-enabled ERP capabilities and composable ERP strategies for manufacturers to stay flexible and responsive.

Priority Software is helping manufacturers make this transition, offering ERP solutions that empower businesses to adapt and thrive. With AI-powered analytics, real-time insights, and a flexible, composable architecture, Priority ERP enables smarter decisions, streamlined operations, and faster responses to market changes.

Priority

About Priority

Priority is a versatile and highly scalable, AWS-based, native cloud ERP platform, catering to businesses of all sizes. As a flexible and open ERP platform, companies can quickly adapt to evolving business needs and seamlessly integrate the platform with other business management systems. With a powerful and user-friendly UI, users can personalize the system and create mobile apps, web portals and business processes without any coding. Powered by AI, it offers process automations, recommendations, and optimization algorithms. With several decades of development and innovation, Priority stands out as one of the most comprehensive ERP platforms available. It supports an impressive array of in-depth functionalities, covering financials, CRM and sales, supply chain management, manufacturing, distribution, customer service, project management, warehouse management, equipment rental, business intelligence, intelligent workflows, mobile app generation and more.

OneStream Launches IPO With The Help of Sage Intacct

Learn how Sage Intacct supported OneStream to grow their CMRR by 800% in four years, overcome their manual accounting struggles, and position themselves for success as a public company.

OneStream, a comprehensive cloud-based platform to modernize the office of the CFO, launched their IPO in July with the help of Sage Intacct.

Here, we'll be looking at how Sage Intacct supported *OneStream* to grow their CMRR by 800% in four years, overcome their manual accounting struggles, and position themselves for success as a public company.

Article by
David Appel
Head of the SaaS Vertical
Sage

Inhibitors to scale: Stuck in manual mode with QuickBooks

Before switching to Sage Intacct, OneStream faced several significant challenges and sought an ERP that would help the team scale and prepare for future growth.

Initially, they were using a small business accounting system that was suitable for the company's early stages but couldn't keep up with their rapidly expanding needs.

Because the prior accounting system relied heavily on manual processes, OneStream struggled with:

- billing inefficiencies and manual reconciliation processes
- the hassle of dealing with manual rev rec spreadsheets
- being limited to manual worksheets for scaling.

Clearly, something had to change for OneStream to achieve its goal to scale their transactional accounting processes.

> "Sage Intacct gave us the robust financial transactional tools and compliance tools and integration capabilities we needed to prepare for our growth and becoming a public company."
>
> -Pam McIntyre, Corporate Controller and Senior Vice President of Finance at OneStream

Today, the company has more than 1,500 customers, 1,400 employees, and 250 go-to-market, implementation, and development partners.

They are now executing their vision to be the operating system for modern finance, digitizing core financial functions and empowering the CFO to become a critical driver of business strategy.

How did they get from point A to point B?

They embraced automation and upgraded their transactional accounting suite.

Why did OneStream upgrade their finance tech stack?

As OneStream found product-market fit and wanted to scale their sales velocity and GTM motion, the finance team aimed to support the growth of the company, the requirements to invoice, manage multi-entity accounting requirements and manage accounting processes in the previous accounting system required a lot of manual processing, support files and review procedures to ensure accuracy.

This was not scalable for the company or valuable work for the business.

1. Their primary finance workflows were too manual

Prior to upgrading to Sage Intacct, OneStream's recurring billing, revenue recognition, and close processes required a lot of manual processing.

This high level of manual effort resulted in inefficiencies.

2. The lack of process automation led to scalability issues

As OneStream grew, the prior accounting was not ideal to handle the increased volume of transactions and complexity.

This created complexity with different revenue recognition models and made international close processes difficult as they continued to expand.

As OneStream pursued automation via tactical additions to their tech stack, they discovered another problem.

3. Lack of integration presented strategic difficulties

Integration capabilities with supplemental marketplace applications required manual record keeping.

This meant OneStream had a hard time streamlining operations for efficiency and consolidating data across the company's various departments and systems.

Why OneStream Chose Sage Intacct

Eventually, OneStream recognized the limits of the prior accounting software and the need for a more robust solution to support their recent growth.

They needed a truly flexible accounting tool that could help them reach their goal and requirements to scale.

After a careful assessment of the different options on the market, OneStream's finance team chose Sage Intacct.

This important decision was driven by several key factors that are common among market-leading technology companies.

They anticipated growth in customers and employees

This meant that OneStream required an accounting system that could grow with them, meeting their scalability needs in billing transactions, billing models, expenses, and payables.

Article by David Appel

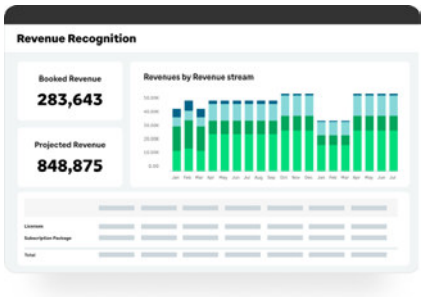
Sage Intacct's ability to seamlessly scale with OneStream's growth was a major draw.

It gave the company a way to handle the increasing volume and complexity of its transactions and operations.

They hoped to automate recurring billing and revenue recognition

OneStream's billing and revenue recognition needs were multifaceted.

The company had a multi-product billing model which required heavy manual efforts and review as well as high volumes while accompanying professional services billing.



Sage Intacct's contract recurring billing module gave them a way to handle all of these billing models.

With corresponding MEA revenue recognition across *ASC 606 and IFRS 15*, the software enabled OneStream to semi-automate billing and compliance.

Anticipating international expansion, they needed multi-entity and multi-currency consolidation

Sage Intacct's ability to add new entities, whether from multi-country growth or acquisitions, made it a natural choice for OneStream.

The software allowed them to rapidly and successfully grow into new markets.

Further, Sage's *Fixed Assets* solution was implemented to help them track the value of their fixed assets and maximize tax savings as they grew into a worldwide business.

OneStream banking integration

As the company continued to grow, cash and banking management and integration was important.

The ability to integrate directly with the banking platform to review payments, perform cash reconciliations and perform reporting was very important

They wanted to simplify the close and reduce data delays for reports and forecasts.

OneStream knew they needed a scalable transactional reporting ERP that could:

- centralize the financial close ledgers and subledgers
- integrate with other SaaS products
- ensure a consistent and accurate close.

Sage Intacct gave them the transactional tool they were looking for.

> "OneStream's journey to IPO reflects a tremendous leadership team and group of colleagues backed by advanced accounting software."

Sage's strong product partnerships supplied ease of integration with OneStream's own product for planning, forecasting and analysis and consolidation, as well as JPM Access, Kimble PSA, Salesforce, Coupa, and Tesorio.

The company finally had a system that scaled for the transactional volume for it's sub-ledgers, ledgers and integrated toolsets for all its financial data, as well as its ability to integrate with OneStream to enable real-time forecasting and reporting.

OneStream's big wins after switching to Sage Intacct

With their newly improved tech stack, the finance team was able to scale to support that market traction and GTM acceleration — driving to, and through, their goal to become a public company.

Pam McIntyre, OneStream's Corporate Controller and Senior Vice President of Finance, shares that the finance team achieved significant milestones that have propelled the organization's growth and efficiency:

IPO

Pam says, "Sage Intacct gave us the robust financial transactional tools and compliance tools and integration capabilities we needed to prepare for our growth and becoming a public company."

Reduced close time

The company cut its financial close time from 15+ days to just 5 days, complementing the process with OneStream's *Financial Close solution.*

Customer growth

OneStream expanded its customer base from approximately 500 to more than1500 customers. "We

didn't need to significantly increase the size of our accounting team," says Pam, "so we were able to control costs as we scaled."

New product lines and billing types
The company successfully added new products and billing models, including seat-based, usage-based, platform-based, and professional services.

Revenue recognition
Sage Intacct gave OneStream access to ASC 606 and IFRS 15 revenue recognition at the push of a button. "Prior to Sage, revenue recognition was a consuming process," Pam explains.

International expansion
They supported their expansion into 18 international ledgers, consolidating on their OneStream *Financial Consolidation product.*

Enhanced billing and cash flow
Integration with Salesforce CPQ and the rollout of new billing types accelerated billing processes.

Global cash management:
Sage Intacct's integration with Sage Network and banking systems streamlined OneStream's global cash management.

Improved financial reporting:
OneStream leveraged its newly accelerated close to quickly transfer accounting data into *the company's FP&A platform*.

They achieved robust financial reporting and forecasting, raising their gross margin to 75% as of 9/30/2024.

Team culture transformation
Beyond all of these financial improvements, there was a great evolution for the team working hard to produce these outcomes.

Previously, the finance team spent much of their time on manual tasks.

But after switching to Sage, they were able to switch that time to focus on driving and supporting growth.

This cultural shift led to the finance team becoming proactive partners to business leaders.

It also led to reduced fire-fighting and created a more collaborative environment.

A place where teams analyzed data to find new areas of growth and efficiency.

Final thoughts

OneStream's journey to IPO reflects a tremendous leadership team and group of colleagues backed by advanced accounting software.

With Sage Intacct in their tech stack, OneStream was equipped with powerful financial reporting to analyze SaaS metrics, helping them better forecast the future.

The problems OneStream faced on basic accounting software like QBO are common among high-growth technology companies that have found product-market fit and want to accelerate GTM motion.

By leveraging Sage Intacct's robust capabilities, OneStream not only removed these inhibitors to scale and operational efficiency, but also positioned itself for a successful IPO, with predictable growth and profitability.

The ability to utilize a single unified tech stack across Sage and OneStream's own enterprise platform fueled a transformation in team culture, and significant improvements in financial reporting and cash management.

This underscores the value of a scalable, integrated financial management solution in driving to OneStream's IPO and their continued success.

Sage created a new offering, Sage for SaaS and Technology, that allows other technology companies to take a similar approach to *producing frictionless finance automation & intelligence to grow through IPO.*

Check out this 5-minute product tour to see how you could leverage this solution for yourself.

About David Appel
David Appel is Global Head of the SaaS Vertical for the largest technology company on the London Stock Exchange, Sage. Over time, his organizations have earned the business of >1,800 SaaS and Software companies, growing at 40%+/year. He previously ran Direct Sales at Bill.com, led NetSuite's Software Vertical, and was part of IBM's Corporate Development team.

About Sage
Sage exists to knock down barriers so everyone can thrive, starting with the millions of small- and mid-sized businesses served by us, our partners, and accountants. Customers trust our finance, HR, and payroll software to help business flow. By digitizing business processes and relationships with customers, suppliers, employees, banks and governments, our digital network connects SMBs, removing friction and delivering insights. Knocking down barriers also means we use our time, technology, and experience to tackle digital inequality, economic inequality, and the climate crisis. Learn more at www.sage.com/en-us/.

Article by David Appel

AI in 2025: Five Defining Themes

Artificial intelligence (AI) is accelerating at an astonishing pace, quickly moving from emerging technologies to impacting how businesses run. From building AI agents to interacting with technology in ways that feel more like a natural conversation, AI technologies are poised to transform how we work.

But what exactly lies ahead? We'd like to share five key themes for AI in 2025 that undoubtedly come with challenges for businesses but also the potential to redefine what's possible. Ready to glimpse into next year and beyond? Let's dive in.

1. Agentic AI: Goodbye Agent Washing, Welcome Multi-Agent Systems

AI agents are currently in their infancy. While many software vendors are releasing and labeling the first "AI agents" based on simple conversational document search, advanced AI agents that will be able to plan, reason, use tools, collaborate with humans and other agents, and iteratively reflect on progress until they achieve their objective are on the horizon. The year 2025 will see them rapidly evolve and act more autonomously. More specifically, 2025 will see AI agents deployed more readily "under the hood," driving complex agentic workflows.

Users will interact with a copilot for their tasks, which will deploy the request and coordinate among systems of multiple expert AI agents to complete more difficult tasks. Future AI agents, or multi-agent systems (MAS), can collaborate to understand the business user, have all the context, and structure the problem to subsequently interact with these domain-specific expert AI agents — each performing specific sub-tasks that together complete a much more complex task. In the future, users will not even need to trigger an action. Instead, AI agents will proactively respond to business events such as incoming customer inquiries, supply chain disruptions, or demand surges. They will automatically prepare a decision workflow as far as they can before pinging the human user for feedback.

> "AI agents will handle and complete routine, repetitive tasks end-to-end as effectively and often even more effectively than humans, leading to increased productivity and demonstrable cost savings."

If we look at a five-year horizon, AI agents will simplify significant portions of workflows, even aspects that have been resistant to automation, such as exceptions in customer service, long-tail administrative tasks, and specific programming activities like coding or debugging software. AI agents will be flexible and can plan, fail, and try something else or self-correct based on reasoning. AI agents will handle and complete routine, repetitive tasks end-to-end as effectively and often even more effectively than humans, leading to increased productivity and demonstrable cost savings. Agents will be more adaptable and robust than conventional robotic process automation (RPA) for longtail and highly extensive tasks. This means figuring out the best result out of many possible outcomes, which is almost impossible to hardcode in an RPA algorithm with classical automation methods.

Adopting AI in these domains will also shift workforce dynamics, with human roles evolving to focus on anticipating uncommon scenarios, coping with ambiguity, factoring in human behavior, making strategic decisions, and driving genuine innovation — complemented, not replaced, by AI capabilities.

In short, AI will handle mundane, high-volume tasks while the value of human judgement, creativity, and quality outcomes will increase.

2. Models: No Context, No Value

Large language models (LLMs) will continue to become a commodity for vanilla generative AI tasks, a trend that has already started. LLMs are drawing on an increasingly tapped pool of public data scraped from the internet. This will only worsen, and companies must learn to adapt their models to unique, content-rich data sources. Model improvements in the future won't come from brute force and more data; they will come from better data quality, more context, and the refinement of underlying techniques. Companies must spend more time innovating to make better models through fine-tuning and model adaptation rather than just training larger and larger models. Neurosymbolic AI techniques, especially knowledge graph, will see a renaissance since they can provide both learning objectives for foundation models and context to significantly improve the performance of generative AI while reducing hallucinations.

We will also see a greater variety of foundation models that fulfill different purposes. Take, for example, physics-informed neural networks (PINNs), which generate outcomes based on predictions grounded in physical reality or robotics. PINNs are set to gain more importance in the job market because they will enable autonomous robots to navigate and execute tasks in the real world, from warehouses to manufacturing plants, or models trained on tabular, structured data, like SAP Foundation Model, and can handle tasks that LLMs cannot do well, like predictions of numeric values.

Models will increasingly become more multimodal, meaning an AI system can process information from various input types. AI applications will eventually evolve into "any-to-any" modality solutions capable of understanding, processing, and reasoning across text, voice, image, video, and sensor data within a single model. In addition, smaller and more specialized LLMs with scalable finetuning techniques and the ability to work on any device will become more common, a trend that may lead to hyper-personalized models for organizations or even individuals in the future.

> "Large language models (LLMs) will continue to become a commodity for vanilla generative AI tasks... Model improvements in the future won't come from brute force and more data; they will come from better data quality, more context, and the refinement of underlying techniques."

Article by Walter Sun, Sean Kask, Jonathan von Rueden

Enterprises will shift toward strategies utilizing multiple foundation models (not to be confounded with multimodal capabilities in a single model, described above), leveraging a diverse set of AI models and techniques tailored to specific use cases. This is backed by the trend of fine-tuning small slices of models, which requires fewer resources and much less data, resulting in full model flexibility and enabling businesses to extract more value from their unique data and gain a competitive edge. Enterprise software vendors will offer or extend integrated AI model marketplaces and platforms that support seamless model deployment, management, and updating. Benchmarking and lowering model switching costs will help deploy the same use cases in heterogeneous environments. Context equals value. Knowledge graph technology has been around for 40 years and is now seeing a revival because it can overcome key LLM challenges, such as understanding complex formats, hierarchy, and relationships between business data. Knowledge graphs offer data meaning and explain the relationship between entities, significantly supercharging the abilities of LLMs. The next step in this journey will be large graph models, allowing further advancement in generative AI.

Implicit knowledge is power, and making knowledge explicit to others is a superpower.

3. Adoption: From Buzz to Business

While 2024 was all about introducing AI use cases and their value for organizations and individuals alike, 2025 will see the industry's unprecedented adoption of AI specifically for businesses. More people will understand when and how to use AI, and the technology will mature to the point where it can deal with critical business issues such as managing multi-national complexities. Many companies will also gain practical experience working for the first time through issues like AI-specific legal and data privacy terms (compared to when companies started moving to the cloud 10 years ago), building the foundation for applying the technology to business processes.

> "AI's next frontier is seamlessly unifying people, data, and processes to amplify business outcomes... AI copilots will become the new UI for engaging with a system, making software more accessible and easier for people."

From a technological perspective, while 2024 saw significant advancements in AI, 2025 will see companies focus on making these advancements more meaningful through seamless data integration, ultimately enhancing the accuracy and significance of AI-powered outcomes and boosting adoption. Lastly, in 2025, we might glimpse a shift in the software business model from building static software features and functions to an outcome-as-a-service model focused on achieving process objectives.

4. User Experience: AI Is Becoming the New UI

AI's next frontier is seamlessly unifying people, data, and processes to amplify business outcomes. In 2025, we will see increased adoption of AI across the workforce as people discover the benefits of humans plus AI.

This means disrupting the classical user experience from system-led interactions to intent-based, people-led conversations with AI acting in the background. AI copilots will become the new UI for engaging with a system, making software more accessible and easier for people. AI won't be limited to one app; it might even replace them one day. With AI, frontend, backend, browser, and apps are blurring. This is like giving your AI "arms, legs, and eyes." While power users will still have singular, expert interfaces, most users will demand flexibility across multiple access patterns. At the same time, there will be a growing acceptance of longer inference times for high-quality answers to complex, previously unsolvable problems and actions in domains requiring deep analysis and research. Ultimately, users will recognize the trade-off between latency and complexity of tasks handled by AI.

Importantly, we will see organizations move beyond viewing AI as a collection of productivity tools and begin reimagining their workforce as a network of collaborative intelligence with AI agents and humans working to accelerate innovation within the enterprise. For example, combining human expertise in strategic thinking with AI's strengths in large-scale analysis and pattern recognition

will create new competitive advantages for companies that effectively orchestrate these hybrid intelligence networks to drive breakthrough discoveries and market opportunities. Next year will also mark the early stages of a significant shift in how humans and AI work together, with agents evolving into workflow partners, taking initial steps toward independently navigating software environments and automating routine tasks – from data analysis and report generation to schedule coordination and software testing. This will also start a longer journey toward transformed work processes and patterns, with forward-thinking organizations developing new roles, metrics, and training approaches for effective human-AI task collaboration.

> "The discussion will shift from what we try to regulate from a technical standpoint to how we innovate and what we deem fundamentally human, helping shape a long-term vision for how we want humanity and AI to live and work together."

5. Regulation: Innovate, Then Regulate

It's fair to say that governments worldwide are struggling to keep pace with the rapid advancements in AI technology and to develop meaningful regulatory frameworks that set appropriate guardrails for AI without compromising innovation. The regulatory landscape will become even more fragmented, with the *OECD AI Policy Observatory* tracking hundreds of AI regulations under discussion worldwide. This requires evaluating model compliance with and technical interpretation of various regulatory frameworks.

In 2025, the discussion will shift from what we try to regulate from a technical standpoint to how we innovate and what we deem fundamentally human. This discussion will elevate the role of humans, contribute a much more positive perspective, and help shape a long-term vision for how we want humanity and AI to live and work together.

In this environment, it will continue to be critical for companies developing and deploying AI technology to adhere to responsible principles around safety, security, and ethical use. This will also help set the stage for important precedents and compliance.

Executing on the Themes in 2025

Indeed, these are just a few of what we are sure will be many exciting advancements for AI in 2025. Overall, the biggest takeaway from the year ahead will be making existing breakthrough technology more meaningful. We will see AI much deeper and almost invisibly embedded in consumer and enterprise applications and witness more advancements in how vendors and organizations that use these applications embed their individual contexts and data into AI seamlessly.

Getting to the point of leveraging AI generally, however, will require businesses to take advantage of a modern cloud suite with unified data access and harmonized data models to overcome data silos and fully benefit from AI innovation that spans across the whole enterprise. This will drastically increase the accuracy and significance of AI-powered outcomes, ultimately boosting adoption, specifically in the enterprise space.

We can't wait to see what the future holds.

About SAP
As a global leader in enterprise applications and business AI, SAP (NYSE:SAP) stands at the nexus of business and technology. For over 50 years, organizations have trusted SAP to bring out their best by uniting business-critical operations spanning finance, procurement, HR, supply chain, and customer experience. For more information, visit www.sap.com.

Article by Walter Sun, Sean Kask, Jonathan von Rueden

The Acumatica Difference: ERP Training and Access to the Latest Information

Our commitment to Community goes beyond words, offering customers a unique voice in technology innovation, free professional online training, and seamless access to knowledge and resources—all designed to help businesses thrive together.

What makes Acumatica different is captured in our Rallying Cry: Building the Future of Business, Together. It's a dedication to *Community and connection*—two inspiring words that carry positive connotations of strong bonds, solidarity, and working together. But what do they actually mean in practice, and how is this important sense of Community made real to our customers?

More than just platitudes, Community and connection are at the core of our entire business. The vibrant Acumatica Community of customers, partners, and creators pushes our innovations and product roadmap forward and drives decisions on feature updates and new capabilities.

We believe that, instead of having technology imposed on them, all customers are entitled to have a voice in how their technology is developed and implemented. This is fundamental to making sure that technology truly addresses their real-world needs. Our commitment to giving the Acumatica Community easily accessible ways to have this voice—to communicate, ideate, and imagine what's next—takes two major forms.

Instant Access to Knowledge and Resources

Knowledge, no matter how important, is only valuable if you can access and learn from it. Acumatica believes customers have the foundational right to "take advantage of all knowledge and resources developed across a broad Community of employees, partners, and customers." They have the right to freely participate in this Community, have their voices heard, and influence change. And they should be able to accomplish all that in a comfortable, easily accessible way. Learning about Acumatica and sharing knowledge with others should be an enjoyable experience.

Article by
Elena Abilova
Education Project Manager,
Acumatica

Acumatica takes resource sharing a step further than other ERP vendors because it's not just about posting information for people to consume. It's about having a two-way channel of communication that facilitates give and take, making it easy to share thoughts and opinions. That is how a true Community is built.

It's also how we achieve our customer-driven innovation—particularly through the online *Acumatica Community portal*. In these virtual forums, thousands of Acumatica users share insights and post product ideas informed by their daily use of the system. Other users then have the opportunity to vote on these ideas. We use the results of this feedback and voting to determine what new features will be added to the solution.

All ERP customers should expect to have such a voice in shaping the future of their software. They should also expect to access knowledge from their peers without a single hiccup.

Free Professional Online Training

But knowledge about an ERP system doesn't begin and end with learning from other users. ERP vendors should offer deep-dive training, but, when they do, there's often a catch. Some may offer free training that is limited and lacks insight. Others may offer comprehensive training that is prohibitively expensive. And still others may offer free, comprehensive training solely in a format (e.g., in-person) that is inaccessible to some of their customers.

In contrast, Acumatica believes that self-directed, online training should always be free, comprehensive, and available to everyone. We could not be more pleased with the dynamic, accessible learning environment we have built with *Acumatica Open University.* We offer user-friendly courses on:

- Getting Started with Acumatica.
- Inventory and Orders.
- Project Management.
- Customer Management.
- Reporting and Customization.
- System Administration.
- Web Services.

Open University provides a consistent stream of insightful webinars, and we've designed specialized learning paths for consultants, developers, and end-users. There are job-aids built to help people holding specific positions (e.g., inventory clerks, sales managers, customer service representatives, accounts payable clerks, and marketing managers) become experts in using Acumatica to do their jobs. We also include interactive elements. For instance, many courses feature recordings from our insightful webinars, and we give users the option to interact with and consume those materials in their preferred formats—either PDF or video. Additionally, many end-user and developer courses include quizzes, so learners can self-check their progress.

Acumatica Open University contains thousands of dollars' worth of information and gives it to users absolutely free of charge.

We believe Community lies at the heart of a successful vendor-customer relationship and is based on making it easy for people to get more information, to have access to training, and to be able to reach out and get their questions answered. For all businesses, particularly small and midsized businesses, technology can feel daunting. Even after implementing a system designed to make business operations easier, users may have many questions. A responsible vendor is one that stays with you, not just after the sale, but permanently. As long as you are using the software, the vendor should be there to provide resources and support.

> "The vibrant Acumatica Community of customers, partners, and creators pushes our innovations and product roadmap forward and drives decisions on feature updates and new capabilities."

Through our Community, Acumatica gives customers the opportunity for in-depth, enriching engagement, so they can become real partners in developing the product, while learning more about how they can better use technology to help their businesses thrive and grow. If you'd like to hear more about how we can best serve your business, *contact our experts* today.

About Acumatica

Acumatica Cloud ERP is a comprehensive business management solution that was born in the cloud and built for more connected, collaborative ways of working. Designed explicitly to enable small and mid-market companies to thrive in today's digital economy, Acumatica's flexible solution, customer-friendly business practices and industry-specific functionality help growing businesses adapt to fast-moving markets and take control of their future. For more information, visit acumatica.com or follow us on LinkedIn.

Article by Elena Abilova

What is Enterprise AI Readiness?

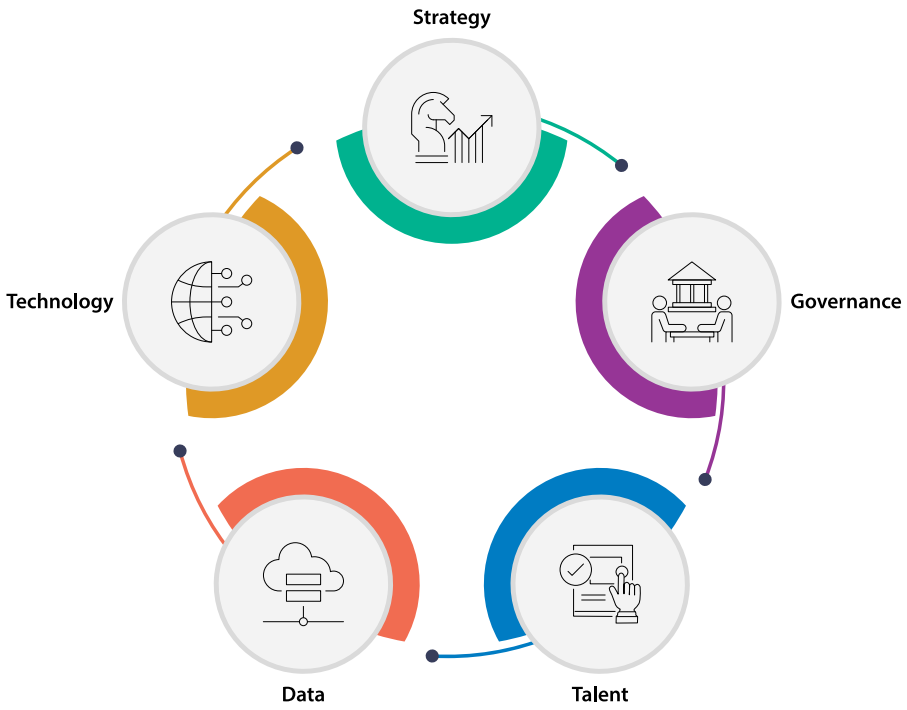
Infosys's Enterprise AI Readiness Radar explores executive attitudes toward AI and assesses how prepared companies are to transition from their current state of experimentation and point solutions to system-wide change and adoption.

For our *Enterprise AI Readiness Radar report*, we surveyed 1,500 companies globally and interviewed more than 30 executives to determine whether they have the foundational building blocks for enterprise AI and how culture and leadership mindset influence AI adoption. The report helps leaders understand the challenges of achieving enterprise AI and considers how to apply these insights to their business context.

What follows is a list of questions and answers that analysts and business leaders have posed to the Infosys Knowledge Institute since the report's publication.

What is the significance of the AI readiness framework's five building blocks?

The five building blocks for AI readiness are strategy, governance, talent, data, and technology (Figure 1).



Strategy: AI initiatives should be aligned with resources and policies, and the value of each use case should be confirmed before initiation.

Governance: Rigorous processes should be in place to reduce risks from AI, including ethical, brand, and legal risks. We advise establishing a centralized AI team to safeguard technical, legal, ethical, and reputational risks. At Infosys, the Responsible AI Office is the custodian of AI governance and facilitates collaborations across functions.

Talent: Employees need to be trained and must have a good understanding of AI. AI-led learning paths should be in place to upskill the workforce.

Data: All data should be robust and of high quality across all data types. Data should also be easily located and accessible. Enterprise AI needs a data architecture that can manage all types of data at scale, with safeguards for bias, security, privacy, and regulations.

Technology: Foundational technology capabilities must be in place and readily accessible. This includes dynamically provisioned infrastructure and compute; security and rights management; flexible infrastructure for open- and closed-source AI models; and integration with application programming interface (API) frameworks. Companies should also ensure software development processes are as automated as possible.

How can an effective AI strategy address the gaps in readiness businesses are facing?

The AI strategy should cover technology investments, talent acquisition, and ethical considerations. To execute, companies should set up an AI value office. This office is responsible for governing AI's impact on the modern data estate, emerging technology, generative AI experimentation; integrating AI into operations; and overseeing responsibility, regulations, culture, and ethics. The office uses value-based prioritization for investments and project greenlighting, with outcomes tied to reputational, legal, and compliance risks. These investments are the AI use cases or capabilities that have the potential to deliver the most significant impact on the identified business objectives, such as increasing revenue or expanding into new markets.

> "The five building blocks for AI readiness are strategy, governance, talent, data, and technology—each of which plays a critical role in ensuring successful AI adoption within an enterprise."

What metrics of success should executives focus on?

In the report, we reference the productivity benefits from AI. But executives should also focus on financial impact (revenue growth and cost reduction) and customer experience (customer satisfaction and retention), along with innovation (measured by time to market and market share), user adoption rates, and model performance.

Do legacy technology and processes influence readiness?

Although we did not directly assess the state of participant companies' infrastructure, we interviewed financial services and healthcare/ medical executives — industries that traditionally have many legacy systems. These interviews showed that they were using existing systems to become AI-ready by using APIs, microservices, and middleware integration, and by training AI on data from legacy systems using data transformation and cleansing techniques to ensure compatibility.

> "Only about 10% of companies are confident in their governance, security, and privacy processes, highlighting a significant gap in AI readiness across industries and regions."

For companies where the customer journey is significant (e.g., retail, logistics, banking), interviewees told us they were reimagining processes to become AI-ready. This means mapping workflows and identifying pain points, inefficiencies, and repetitive tasks that AI can enhance or automate. These executives are prioritizing areas with the most significant impact, such as customer service (chatbots) and personalization (recommendation engines). They were keen to ensure the new process or customer journey is data-driven and capable of capturing and utilizing relevant data for AI models.

Which industries and regions are most ready for AI?

We can't comment on industry confidence as the sample sizes were too small and the margin of error too high.
On geographies (US, UK, Germany, France, and ANZ), the following insights are pertinent.

Strategy. Overall, only about 15% were confident that AI projects had the following strategic elements in place: business case validation, clear use case, compliance with policies, governance sign-off, and resource availability.

This trend is much the same across all regions, with no significant difference between geographies on this strategic dimension.

Governance. Overall, only about 10% are confident in governance, security, and privacy processes. This includes legal, ethical, and brand governance; technical governance; and security, privacy violations, and access protection.

This trend is much the same across regions, with some indication that ANZ is less ready on technical governance than other regions (8% ANZ were confident vs. 12% overall on this dimension, though not significantly different).

Talent. Talent readiness was measured by AI awareness, tools, knowledge, and access to AI. Overall, only about 20% of companies had employees who were proficient in AI tools and techniques (across the areas of tools, AI knowledge, and access to AI), with 28% having proficiency in AI awareness.

This trend remains the same across all regions (roughly 28% ready on awareness and 20% ready on tools, knowledge, and access to AI).

Data. For this dimension, we asked about the accuracy of corporate data, data governance, ease of data location, and ease of data access. Overall, 30% rated data accuracy and data governance processes as "closer to poor," and only about 10% said that it is relatively easy to locate and access data for AI projects.

This trend remains the same across regions.

Technology. We evaluated four foundational technology capabilities: dynamically provisioned infrastructure and compute, security and rights management, flexible infrastructure for open- and closed-source AI models, and integration with API frameworks. Only 2% had all four of these capabilities, but more than half had either none (17%) or one (40%).

Only ANZ showed statistical difference from the overall trend, with no companies in ANZ having all four of these technologies in place.

> "Executives should focus not only on the productivity benefits of AI but also on financial impact (revenue growth and cost reduction), customer experience (satisfaction and retention), and innovation (measured by time to market and market share)."

Why is there such low confidence in protecting against security and privacy risks?

Companies we spoke to for the report lacked adequate master data management processes and, more often than not, either didn't have access to or hadn't created a centralized governance office to ensure data (and model) privacy and security. Many didn't know what data they had and where it was located, exposing the enterprise to significant risks. Poor data governance makes it difficult for teams to agree on definitions, controls, what data is shared, and when. Another problem is that they had no capabilities to stress-test their technology via red teaming, or simulated adversarial activity. This means they don't know if their AI models are secure against attacks such as prompt injections, jailbreaking, extraction, and poisoning.

What role does responsible AI governance play in successful AI adoption?

Responsible AI governance ensures that AI products and services are adopted by users. People need to trust and verify decisions made by AI systems. By embedding responsible governance into AI development and deployment, companies can ensure security and privacy and uphold core human-centric values such as transparency, safety, equality, accountability, privacy protection, and respect for human rights. This also supports regulatory compliance and overcomes what is known as ethical drift – the tendency of products to move away from their intended purpose as design and development takes place. Some 48% of companies that implement responsible AI and communicate their efforts *experience enhanced brand differentiation.* This is reason enough to establish responsible AI as a core part of enterprise AI strategy.

What AI governance frameworks are recommended for different regions?

European companies should build AI products that comply with the *EU AI Act*, which further cements the EU's role in establishing global digital standards. However, companies also need to be aware of standards in other parts of the world, notably in China, which has already adopted *several AI laws.*

In ANZ, Australia's *Ethical AI Principles* sets standards around fairness, transparency, accountability, and privacy. In the US, compliance with the *NIST AI Risk Management Framework*, and *Google's AI principles*, are a good place to start.

How can companies build a culture of tech-readiness?

Our report found that only one in five employees has adequate AI knowledge. Although reskilling is a core component of getting the talent building block in place, having high AI knowledge in the organization is vital for technology readiness. Employees will also need access to four foundational technology capabilities – dynamically provisioned infrastructure and compute; security and rights management; flexible infrastructure for open- and closed-source AI models; and integration with API frameworks.

As mentioned in the recommendation section of the report, these capabilities are best accessed through a repository of self-service tools. This access can be as simple as an internal development marketplace, or a full-blown platform engineering squad that creates a user interface to access AI capabilities.

Another aspect is the level of automation in software development teams. We found that one-quarter of respondents were using manual software development processes. Automating software development has many benefits, including better customer experience, reduced error rates, improved compliance, and lower stress for teams.

> "Poor data governance makes it difficult for teams to agree on definitions, controls, what data is shared, and when—exposing enterprises to significant risks in AI adoption."

To get employees on board and create a culture of tech-powered innovation, Infosys is enabling access to generative AI tools, including providing software development teams with automation through what is known as *Stream AI* (where whole phases of the software development life cycle are collapsed and automated), and building a pipeline of talent that is knowledgeable about AI, can build the technology through low-code tools, and develops experience of AI engineering techniques and tools.

Article from Infosys

Why is data infrastructure vital for AI success?

Data infrastructure is vital for AI success because it ensures the availability, quality, and accessibility of data needed for AI models — all areas where our respondents report facing challenges.

To know when their data infrastructure is reliable enough and prepared for enterprise AI, companies should assess current systems, including hardware, applications, and integrations. Assessments include whether hardware is fit to run an AI application, interoperability, and infrastructure complexity. It is also important to identify where data is stored and to consolidate it effectively, which might require changes to the data ecosystem.

Companies are more prepared for enterprise AI if their data infrastructure includes systems to cleanse and then fingerprint data (a small, unique digital signature or hash generated using algorithms that capture the essence of the data's content without storing the data itself). This fingerprint allows for better transparency and governance. Additionally, they must know how to handle structured and unstructured data, including traditional analytic data, transactional data, synthetic data, and data from the ecosystem, generated by users or machines.

Is it more costly to restructure an enterprise's existing data structure than to start from scratch?

Restructuring can be costlier in terms of time and money, given the complexity of existing legacy systems, disruption to business processes, the need for customization, and the necessity to reduce technical debt. Starting from scratch is often less expensive and offers the benefit of enabling modern, streamlined data architectures without the burden of legacy issues. Restructuring is a better option when existing data is critical and cannot be replicated; when gradual restructuring is possible; and when a significant amount of money has already been invested in legacy systems.

> "Companies that embed responsible AI governance into development and deployment see a 48% increase in brand differentiation, demonstrating the strategic value of ethical AI practices."

What role does talent development play in AI readiness?

Talent development is a huge factor in AI readiness. As employees increasingly create and train AI systems, they will need strong AI skills (see this *new article* by the Infosys Knowledge Institute) However, our Enterprise AI Readiness research found that most employees lack sufficient awareness of AI and its capabilities; only one in five has adequate AI knowledge. When asked about talent capabilities within their companies, most executives identified a gap in techno-functional talent — professionals who can bridge deep technical expertise with business understanding. This gap means many organizations are unprepared and may miss out on the productivity gains AI can offer.

To get ready, forward-thinking companies are creating AI skills categories and providing AI-led learning paths for employees. For example, Infosys has classified generative AI skills across a progressive ladder of capabilities, starting with AI Aware (nearly all employees), AI Builder (a larger number of practitioners), and AI Master (a smaller number of specialists).

What is the ROI for companies that upskill talent compared to the ones that outsource or hire?

Upskilling talent in AI often proves better than hiring or outsourcing. It leverages existing employees' knowledge of the company's culture, systems, and processes, leading to smoother AI integration. Nurturing in-house expertise fosters loyalty, reduces turnover, and builds a sustainable competitive advantage by embedding AI skills across the organization. Additionally, it's more cost-effective in the long term, as continuous upskilling adapts the workforce to evolving AI needs without high costs and risks associated with recruiting new talent or relying on external vendors. This approach promotes innovation and ensures alignment with strategic goals.

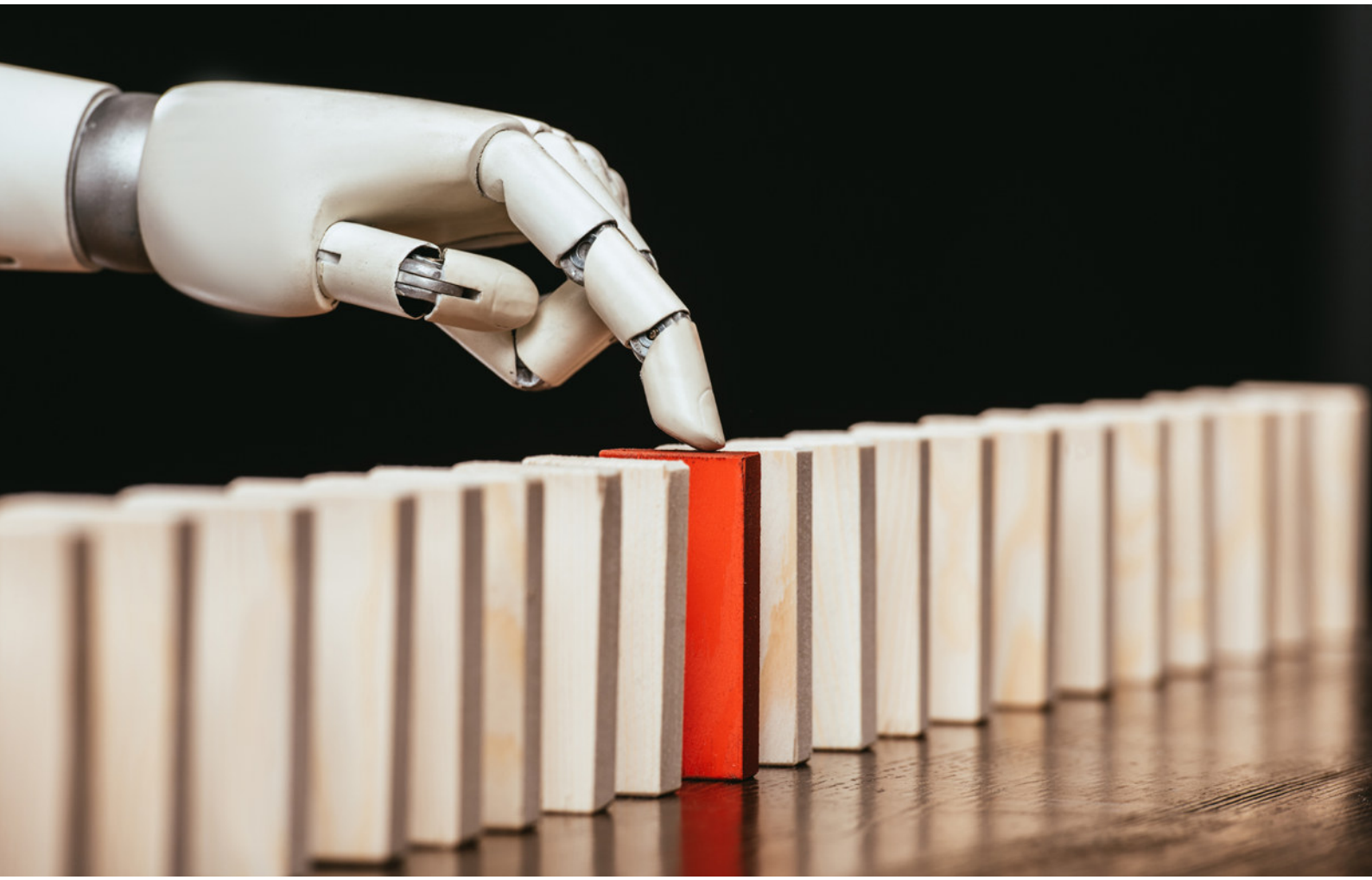
> “Only one in five employees has adequate AI knowledge, making talent development and upskilling essential for organizations looking to fully capitalize on AI’s potential.”

Our research found that only 12% of companies are confident that they are providing employees with sufficient training opportunities. However, *our recent research* on technology, skills, and AI adoption trends showed signs that banking companies now rely more on upskilling than hiring or outsourcing.

Can you elaborate on the “duality of risk and reward” that companies encounter when adopting AI?

This research found that enterprise AI is expected to boost productivity by as much as 40%, with a median increase of 15% across regions. Notably, most organizations are beginning to measure AI’s value delivery (ROI), with some even stating that no strategy is complete without an AI component. Organizations expect significant rewards, with European companies expected to increase investment by 115% this year, according to our *Generative AI Radar research*. While true enterprise AI is still three to five years away, those that get it right can achieve end-to-end AI integration, making capabilities widely available across the enterprise.

Executives are also aware of AI’s legal, compliance, and reputational risks. Even executives who are the most eager to implement AI are concerned about the uncertain road ahead, as indicated by the Cautious Explorer archetype in our report. As one CIO at a US insurance company put it: “The CEO and COO are saying go ahead and do anything that we need to do, but it brings with it a lot of prep and consideration for security, increasing compute power in the cloud and on-premises. Having these conversations can be challenging.”



Why Is Ai-Powered ERP A Game-Changer For Businesses In 2025?

AI business applications have become a new face of 2025 businesses. From filtering relevant insights from libraries of unstructured data to automating complex work operations, the emergence of AI-powered business applications has transformed the landscape of modern businesses.

One such technology is *AI-powered ERP systems*, which have emerged as a beacon of hope and opportunity for big and small-scale business owners yearning for better productivity, efficiency, and precision. A 2023 report from NetSuite found that 66% of organizations reported improved operational efficiency after implementing ERP systems.

In the broadest sense, AI-powered ERP is the future of modern businesses and has become a buzzword among big and small-scale businesses. If you're still using Excel and paper records for storing and managing precious data sets, then there's a strong possibility that your business can go deserted with time.

Why? Because customers are getting savvier and expect quick and personalized services. Gone are the days when companies' reputations used to be measured on the quality of their products or services. Today, to stay in the race, you need to go the extra mile to make your customers feel valued and provide them with flash-like services in less time, as options are countless for them.

If you don't want your prospects to know the doors of your competitors, then it's time to power your business operations with AI-powered ERP solutions that will manage every aspect of your business.

What are AI-powered ERP Applications?

AI-enabled ERPs are smart ERPs, which are advanced versions of enterprise resource planning (ERP) systems that have incorporated artificial intelligence (AI) into the conventional ERP systems. These solutions include machine learning, predictive analytics, natural language processing, and automation tools used to analyze data, improve decision-making, enhance operations, and offer real-time information.

> "AI-powered ERP systems have emerged as a beacon of hope and opportunity for big and small-scale business owners yearning for better productivity, efficiency, and precision."

Cognitive ERP designed *ERP applications* that can reduce specific high-volatility activities and automate mundane tasks, manage inventory, assess demand and supply, deliver better consummate experiences to customers, and facilitate efficient allocation of resources for better business strategies.

The Benefits of AI-Driven ERP Systems

Immediate Insights for Informed Decisions

One of the key benefits of real-time analytics is it provides business leaders with quick and precise analysis with real-time information to support their decisions. Up-to-date information is important for planning and directing businesses in the desired direction and ensuring they adapt to changes in the market well.

Predictive Analytics

Apart from playing the role of a data processing system, an AI-embedded ERP system is also capable of predicting future trends from previous and present data. These aspects provide businesses with a long-term vision to predict demand, customer actions, and market conditions, and by doing so, they can act strategically and be ahead of the competition.

> "With growth and shifts in industries, the integration of AI in ERP systems is no longer a process of choice but a necessary step for reaping continual growth and success."

Chatbots for Quick Query Resolution

By choosing to deploy integrated conferencing and real-time interpreting services within ERP systems, companies can leverage the use of *artificial intelligence-* powered chatbots that assist with constant, fast responses and reactions to employee or customer inquiries. Such request-processing language chatbots help in better communication and increase satisfaction between different departments, cut short the response time, and optimize work.

Cost Reduction

AI-driven analytics help businesses identify inefficiencies and areas of excessive spending, leading to substantial cost reductions. By automating key functions, businesses can eliminate labor-intensive tasks, streamline operations, and become more cost-effective, driving overall profitability.

Conclusion

The use of AI in the operations of ERP systems is changing the face of business by providing consistent direction for decision-making and efficiency in execution. By using such systems, the companies achieve the competitive advantage derived from better resource utilization, better coordination, and early identification of market changes. With growth and shifts in industries, the integration of AI in ERP systems is no longer a process of choice but a necessary step for reaping continual growth and success.

Absolute ERP

Article from Absolute ERP

How to Prepare for the AI-Powered Future of Work

Artificial intelligence (AI) is reshaping how organizations operate and compete. While many businesses are eager to embrace AI's potential, implementing it in a way that truly enhances work is not always straightforward.

To guide organizations along this journey, a new IDC InfoBrief, The Path to AI Everywhere: Exploring the Human Challenges, sponsored by Unit4, offers fresh insights into how AI can transform the future workplace, *not just through automation* but by enhancing human expertise.

IDC predicts a shift toward 'AI Everywhere,' signaling a new phase in the digital business journey. By 2028, 80% of CIOs will implement changes to leverage AI, automation, and analytics, driving agile, insight-driven enterprises. This evolution presents both opportunities and risks, requiring organizations to chart their own path toward responsible outcomes. Successful AI integration must be a core part of growth strategy, balancing business goals with human impact.

Tactical AI vs. Strategic AI

The terms tactical AI and strategic AI refer to different levels of decision-making and problem-solving in artificial intelligence, particularly in contexts such as business decision-making.

1. Tactical AI

- Focuses on short-term, immediate decisions and actions
- Deals with specific tasks or problems within a defined, localized context
- Optimizes for efficiency or effectiveness within a short time frame
- Works within constraints or set rules
- Often reactive rather than proactive

> "The future workplace will place less emphasis on managerial positions and more on roles that leverage AI for competitive advantage. AI orchestrators, for example, will play a crucial part in ensuring that AI tools are used responsibly and effectively, ensuring data integrity and promoting trust in the technology."

2. Strategic AI

- Focuses on long-term planning and overarching goals
- Involves big-picture decision-making across a broader time horizon and often covers multiple interconnected tasks or domains
- Develops plans or policies that guide actions over an extended period, considering future uncertainties and consequences
- Considers broader environmental and situational changes
- Develops and adapts strategies based on predicted trends or patterns
- Often proactive, setting the stage for future tactical decisions

Both types of AI are often used together, where tactical AI executes immediate decisions, while strategic AI informs the overall direction that governs those decisions.

The immediate *benefits of AI* must be weighed against its long-term effects on the workforce. This calls for a clear understanding of tactical use cases and their advantages while considering their impact on individuals and aligning these with broader strategic objectives over time.

3 stages to an AI-driven workplace

The InfoBrief outlines a three-stage evolution toward embedding AI into business processes:

Stage 1: AI assistants

In this phase, *AI helps with task automation* to improve productivity. However, employees must develop new skills, such as effective prompt writing, to get the best results from AI tools.

Stage 2: AI advisors

At this point, AI goes beyond simple task execution, synthesizing information to deliver more sophisticated insights. Human workers will need to learn how to manage multiple data sources and apply critical thinking to shape actionable recommendations.

Stage 3: AI agents

The final stage envisions AI working autonomously to support employees in driving innovation and competitive advantage. Organizations will need "AI orchestrators" who can oversee AI applications and interpret insights, using them to deliver transformational business outcomes.

This journey highlights how AI will increasingly move from supporting basic tasks to becoming a critical tool for innovation and decision-making. To succeed, organizations must be proactive in mapping out their AI strategy.

> "Organizations must foster a culture of continuous learning and create clear policies that protect employees and the business from AI misuse to ensure long-term success in an AI-driven workplace."

Article from Unit4

Preparing for the future – why human expertise matters

One of the study's key findings is that while automation may deliver quick wins in productivity, long-term success lies in rethinking the human roles that interact with AI.

The future workplace will place less emphasis on managerial positions and more on roles that *leverage AI for competitive advantage.* AI orchestrators, for example, will play a crucial part in ensuring that AI tools are used responsibly and effectively, ensuring data integrity and promoting trust in the technology.

Trust is a vital issue when implementing AI. According to IDC research, 43% of employees do not trust their employers to handle their data responsibly in an AI-driven context, and 28% fear layoffs due to AI adoption.

These concerns underscore the importance of building a strong AI DNA within the organization, focused on ethical AI use and transparency.

Building an AI DNA – Putting people first

To ensure successful AI adoption, organizations need to establish what the IDC InfoBrief calls an "AI DNA"—a framework that *aligns AI implementation with organizational culture.*

This means fostering a culture of continuous learning and creating clear policies that protect employees and the business from AI misuse. As AI becomes more integrated into workflows, new roles will emerge, and the importance of training and upskilling will only grow.

In fact, 50% of respondents in the InfoBrief's survey indicated they would need additional training to fully benefit from AI.

This is where Unit4's human-first approach comes into play. At Unit4, we believe in an AI strategy that empowers employees, helping them acquire the skills to become experts in a world where AI acts as a powerful collaborator rather than a replacement.

Strategies for success: A human-centric approach to AI

The future of work isn't about simply layering technology over existing processes. It's about evolving how organizations think about AI—moving from task execution to true innovation. To succeed at this, organizations should focus on three critical areas:

1. Adopt a human-centric AI strategy
Ensure that employees feel part of the AI journey and that the technology is used to augment their skills, not replace them.

2. Involve employees in AI implementation
Collaboration between AI and human workers will be essential, and building trust is key to securing employee buy-in for AI initiatives.

3. Commit to continuous skills development
By investing in upskilling employees across all levels, businesses can ensure they're ready to thrive in an AI-driven world.

Final thoughts…

At Unit4, we believe AI's role is to empower people, not replace them. That's why our AI initiatives focus on enhancing human potential, emphasizing pragmatic and responsible AI use.

> "Purposeful, sustainable implementation of AI at work requires a deep-rooted, company-wide DNA-like understanding that Artificial Intelligence should not be seen as a replacement for human intelligence; rather, that it should serve as a powerful tool to enhance people's creativity and innovative spirit."
>
> -Meike Escherich, Associate Research Director, European Future of Work, IDC.

Purposeful, sustainable implementation of AI at work requires a deep-rooted, company-wide DNA-like understanding that Artificial Intelligence should not be seen as a replacement for human intelligence; rather, that it should serve as a powerful tool to enhance people's creativity and innovative spirit.

Meike Escherich, Associate Research Director, European Future of Work, IDC.

Together, we can build a future workplace where AI complements human expertise, driving greater innovation, productivity, and competitive advantage.

You can learn more about how AI-driven automation is already helping many Unit4 customers here, and you can download the full IDC InfoBrief here.

How AI and Machine Learning Supercharge ERPs

All companies need to use the latest technologies to stay competitive in today's fast-moving business world. ERP systems have been helping businesses for many years by making their work smoother, managing data better, and improving performance. Now, with the addition of AI and ML, ERP systems have become even more powerful. These technologies improve ERP efficiency and work faster and smarter.

AI and ML can also help businesses make better decisions. By analyzing large amounts of data, these tools provide insights that show what is working well and what needs improvement. For example, businesses can use AI to predict customer demands or spot problems before they happen. This helps companies save time, reduce costs, and plan for the future more effectively.

The Evolution of ERP Systems

These ERP systems were traditionally designed with centralization in business operations, reducing inefficiencies. Despite the fact that these systems revolutionized business operations. These aims are basically to improve manual data inputs, static reporting, and delayed decision-making processes.

The narrative has been changed by the rise of AI and ML. These technologies help AI work with ERP systems to manage large amounts of data and predict future trends. In the GCC region, where industries are growing quickly, businesses in places like Dubai are looking for *ERP software* that uses AI to make their work smarter and more flexible.

How AI and Machine Learning are Improving ERP Efficiency

1. Predictive Analytics for Better Decision-Making

AI-based *ERP software* analyzes historical data and can predict future patterns. AI Integration in ERP allows businesses to make proactive decisions. Examples include manufacturers predicting equipment failures, retailers forecasting demand, and logistics operators optimizing delivery routes.

As per a report by Gartner, companies using ERP Efficiency systems with AI improve by 37% in their speed and accuracy of decisions. (Gartner)

> "AI-based ERP software analyzes historical data and can predict future patterns, allowing businesses to make proactive decisions—whether it's manufacturers predicting equipment failures, retailers forecasting demand, or logistics operators optimizing delivery routes."

2. Automation of Repetitive Tasks

Manual, repetitive activities take away a lot of productivity. AI Integration in ERP makes these processes automated so that employees can get to do more strategic work. For instance:

- Invoice processing automation
- Streamlining payroll management
- AI-driven algorithms for inventory management

Automation not only increases the *ERP efficiency* but also reduces errors, thus minimizing the risks associated with manual data entry.

3. Customer Relationship Management Improvement

AI (Artificial Intelligence) and ML (Machine Learning) can provide quick and valuable insights into customer preferences and behaviour. This helps businesses adjust their strategies effectively. For example, sales teams can use AI tools to study how customers interact and predict their buying habits, leading to better customer satisfaction and stronger loyalty.

In the GCC region, where top-quality customer service is extremely important, adding AI to ERP systems helps businesses build stronger relationships with their customers and stay ahead of the competition.

4. Data Security and Anti Fraud Measures

AI-driven ERP systems utilize complex algorithms to analyze and neutralize potential security breaches. Machine learning models are used to monitor user behavior, alert on suspicious behaviors, and keep sensitive business information safe.

With the increase in sophisticated cyber threats, strong security measures are more than a necessity, especially within industries like finance, health, and government sectors of the GCC.

5. Real-Time Insights and Reporting

Static reports in traditional ERP systems lead to delayed decision-making. AI-enabled ERP systems give insights in real-time, thus allowing managers to respond accordingly to the changes in situations.

For example, real-time monitoring of supply chain activities is possible with AI-enabled ERP systems. Bottlenecks are eliminated and smooth operations are ensured.

> "Incorporating AI and ML into ERP systems provides businesses with a technological edge; in a competitive market like the GCC, this advantage can be the difference between thriving and merely surviving."

ERP and AI Integration: Challenges and Solutions

Though the merits of AI in ERP integration are well apparent, challenges during implementation do face the organizations. These common hurdles include:

- ***High Initial Costs:*** AI technology demands much investment. However, long-term ROI usually outnumbers initial expenses.

- ***Poor Quality of Data:*** AI will work properly only on clean, structured data. Data hygiene is required first before implementing AI in the business.

- ***Change Management:*** Employees would resist embracing new technologies. Training programs and clear communication can smooth the transition.

The leading providers of *ERP software solutions in Dubai* address the challenges by offering customized solutions that make the integration process smooth.

Key Advantages of AI and Machine Learning in ERP

1. Scalability and Flexibility
AI-based ERPs are dynamic. From new markets to expanded operations, these ERPs will change with the business but do not sacrifice efficiency.

2. Reduced Costs
Automating business processes and enhancing accuracy results in fewer costs associated with operational processes. For instance, AI-driven inventory management helps in avoiding waste and proper stock optimization.

3. Competitive Edge
Incorporating AI and ML into ERP systems provides businesses with a technological edge. In a competitive market like the GCC, this advantage can be the difference between thriving and merely surviving.

How GO-Globe Leverages AI and Machine Learning to Supercharge ERP Efficiency

GO-Globe is a leading web design company in Dubai, catering to the development of solutions that integrate AI and ML into ERP systems. Their main focus is not on designs but on how to elevate the efficiency of ERP Software Solutions Dubai for businesses around the GCC.

1.Custom AI-Driven Features
GO-Globe creates AI-based tools that are customized to meet specific business needs, helping ERP systems work perfectly with a company's goals.

2. Advanced-Data Analytics
The company adds analytics tools that help businesses understand their data better and make smarter decisions.

3. Seamless Integration
GO-Globe makes sure that AI and ML technologies are smoothly added to existing ERP systems. This reduces disruptions and helps businesses work more efficiently.

Businesses in Dubai looking for powerful *ERP software solutions* can rely on GO-Globe to improve and grow their operations.

> "A PwC report reflected that by 2030, AI could add US $320 billion to Middle East economies, making AI-driven ERP systems not just an option but a necessity for businesses aiming to stay competitive."

The Future of AI-Driven ERP Systems in the GCC

The GCC region is already set to fly as a global hub for technological innovation. Not surprisingly, governments and private enterprises are investing heavily in AI and ML technologies, which can revolutionize industries in their entirety.

A PwC report reflected that by 2030, the AI engine can add US $320 billion to the Middle East economies (PwC Middle East). The UAE is expected to dominate this market further. So, AI-driven ERP for a region's businesses is no longer an option but an enabler for staying in the competitor force.

As AI keeps improving, it will bring new features to ERP systems, like hyper-automation and chat-based AI. These changes will make ERP systems work faster, smarter, and better at solving tricky business problems. This leads to improving ERP efficiency.

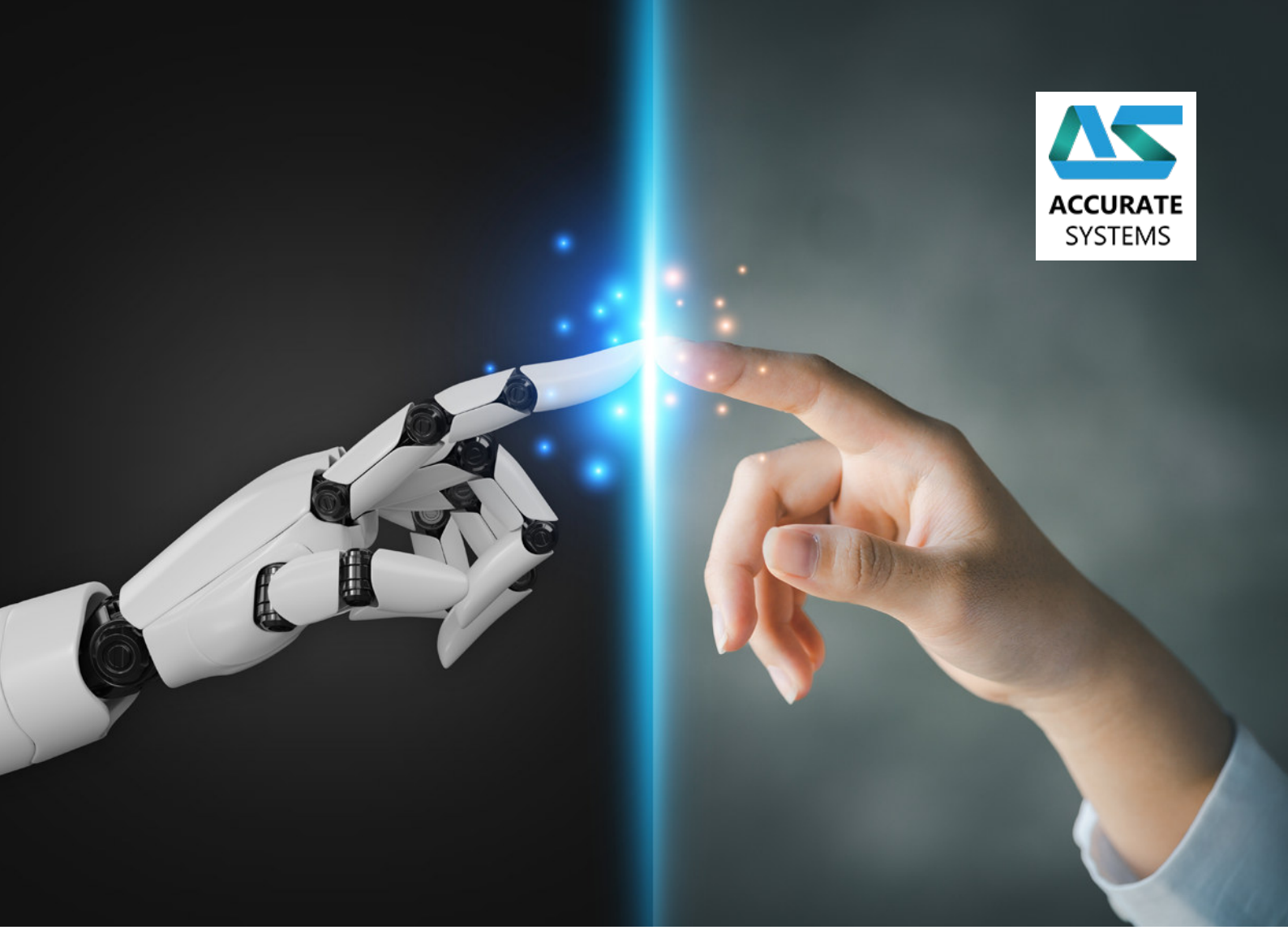
Conclusion

The integration of AI and ML in ERP systems has transformed business operations. With these technologies, organizations improve their efficiency, enabling them to make more effective decisions, cut costs, and boost performance.

AI Integration in ERP systems is the route towards sustainable growth and prosperity for companies in the GCC. Among these companies, GO-Globe is pioneering change with innovative solutions tailored to meet regional needs.

As the digital landscape evolves further, leveraging AI and ML in ERP systems will continue to be a critical strategy for attaining operational excellence and staying ahead of the competition in the GCC market.

Article from GO-Globe



The Future of ERPNext: AI and Machine Learning Integration in 2025

ERPNext is transforming the ERP landscape, and by 2025, the integration of Artificial Intelligence (AI) and Machine Learning (ML) will redefine its capabilities. These cutting-edge technologies will elevate ERPNext to new heights, making it a go-to solution for businesses seeking intelligent, scalable, and efficient enterprise resource planning. Below, we explore how ERPNext's AI and ML features will benefit businesses and enhance performance in 2025.

AI-Powered Analytics for Smarter Decision-Making

ERPNext will utilize AI to revolutionize data analytics, enabling businesses to make smarter decisions based on real-time insights and predictions.

- Demand Forecasting: AI will analyze historical data, market trends, and seasonality to predict demand accurately. This helps businesses optimize inventory management and avoid stockouts or overstocking.
- Financial Planning: Machine learning models will project cash flow, profitability, and expenses, aiding businesses in creating data-driven financial strategies.
- Operational Efficiency: Predictive analytics will identify bottlenecks in production and supply chains, allowing businesses to take corrective action before issues escalate.

These features will provide actionable insights, helping businesses stay competitive in dynamic markets.

Automating Business Processes with AI

Automation is a cornerstone of AI in ERP systems. By 2025, ERPNext will automate repetitive tasks across modules, saving time and reducing human error.

- Invoice Processing: AI-powered tools will handle invoice matching, fraud detection, and payment scheduling seamlessly.
- Inventory Optimization: Intelligent algorithms will track stock levels and automatically reorder supplies when necessary, ensuring uninterrupted operations.
- Customer Service: Chatbots integrated into ERPNext will provide instant support, addressing common queries and enhancing customer satisfaction.

Automating these processes will streamline workflows and allow employees to focus on strategic tasks.

Smart Recommendations for Better Business Outcomes

ERPNext's AI capabilities will provide personalized recommendations to optimize business operations:

- Pricing Strategies: AI will analyze competitor pricing, market conditions, and customer behavior to recommend the best pricing for products or services.
- Workforce Management: AI will optimize employee schedules based on workload and availability, reducing inefficiencies.
- Procurement Decisions: Machine learning will suggest the best suppliers by analyzing past performance, delivery timelines, and cost-effectiveness.

These intelligent suggestions will help businesses maximize profitability and efficiency.

Predictive Maintenance for Manufacturing Excellence

Manufacturers using ERPNext will benefit significantly from AI-driven predictive maintenance:

- Real-Time Monitoring: IoT sensors integrated with ERPNext will collect data from machinery, enabling AI to predict maintenance needs before failures occur.
- Downtime Reduction: Proactive maintenance will minimize unexpected downtime, ensuring continuous production.
- Cost Savings: Businesses can avoid unnecessary repairs and extend equipment lifespan through AI-driven maintenance schedules.

Predictive maintenance will boost operational reliability and cost efficiency.

Fraud Detection and Anomaly Alerts

AI in ERPNext will bring robust security and fraud detection to financial and operational processes:

- Transaction Monitoring: AI will flag irregularities, such as duplicate invoices or unauthorized transactions, to prevent financial fraud.
- Access Control: Intelligent systems will detect unusual login activity or attempts to access sensitive data.
- Supply Chain Risks: ERPNext will monitor supplier performance to identify risks, such as delayed shipments or quality issues.

Enhanced security features will build trust and protect business operations.

Personalized User Experiences with AI

ERPNext will use AI to provide a more intuitive and personalized user experience:

- Custom Dashboards: AI will analyze user behavior to create dashboards tailored to individual needs.
- Workflow Optimization: Smart suggestions will streamline frequently used processes, saving time and effort.
- Natural Language Processing (NLP): Users can interact with ERPNext using voice or text queries, such as "Generate a sales report for last month."

These advancements will simplify navigation and improve user satisfaction.

> "In 2025, ERPNext will stand out as an intelligent, AI-driven ERP system that streamlines operations, enhances decision-making, and automates workflows—empowering businesses to stay ahead in an increasingly competitive environment."

Article from Accurate Systems

AI-Driven HR and Workforce Optimization

ERPNext's HR module will leverage AI to address workforce challenges effectively:

- Attrition Prediction: AI will analyze engagement metrics to predict potential employee attrition, enabling proactive retention strategies.
- Smart Hiring: Machine learning will screen resumes and recommend top candidates for specific roles.
- Performance Management: AI will provide actionable feedback on employee productivity, helping managers optimize team performance.

These features will empower HR teams to make data-driven decisions.

Integration with IoT and Edge Computing

By 2025, ERPNext will seamlessly integrate with IoT devices, enabling real-time data processing and enhanced automation:

- Warehouse Management: IoT sensors will monitor stock levels and provide instant updates to the ERP system.
- Energy Efficiency: AI will analyze energy consumption patterns and recommend ways to reduce costs in manufacturing facilities.
- Quality Control: AI will detect defects in production early by analyzing IoT-generated quality data.

This integration will bridge the gap between physical and digital operations, driving efficiency.

Continuous Learning and Updates

ERPNext's AI models will continuously learn from new data, ensuring accuracy and relevance over time:

- Adaptive AI Models: AI will evolve with business needs, offering insights that align with changing market conditions.
- Community Contributions: As an open-source platform, ERPNext will benefit from global community contributions, enhancing its AI capabilities regularly.

This adaptability ensures ERPNext remains a future-ready solution.

Ethical AI and Data Security

ERPNext's open-source nature ensures that AI integration aligns with ethical standards and data privacy regulations:

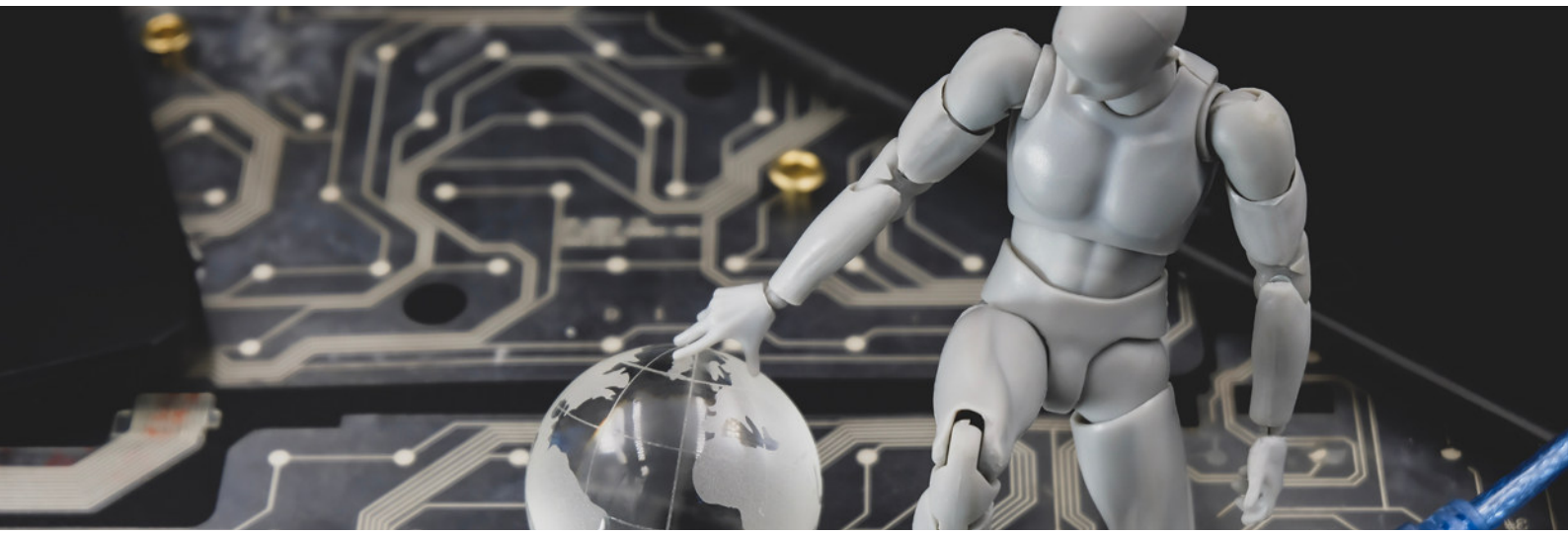
- GDPR Compliance: Businesses using ERPNext can ensure data privacy and compliance with global standards.
- Transparent AI Models: ERPNext will prioritize explainable AI, allowing users to understand the logic behind decisions.
- Bias-Free Algorithms: The ERPNext community will rigorously test AI models to eliminate biases and improve fairness.

These principles will establish ERPNext as a trusted, ethical ERP solution.

Conclusion

In 2025, ERPNext will stand out as an intelligent, AI-driven ERP system that streamlines operations, enhances decision-making, and automates workflows. By integrating AI and ML, ERPNext will provide businesses with tools to stay ahead in an increasingly competitive environment. From predictive analytics to personalized experiences and robust security, ERPNext will continue to redefine the ERP market.

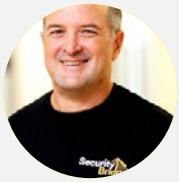
By adopting ERPNext, businesses can embrace innovation, improve efficiency, and unlock new growth opportunities in the digital age.



SAP Security Hidden Risk: Is SAP Solution Manager a Trojan Horse into Your S/4HANA System?

Deadlines are looming! SAP will provide mainstream maintenance for SAP ERP Central Component (SAP ECC) and the SAP NetWeaver 7.5 platform or lower until the end of 2027. A deadline like this requires attention to the SAP Solution Manager system because it is the perfect place for a malicious actor to strike. It connects to almost every other SAP system, thus allowing the cybercriminal to extract significant data.

Indeed, the S/4HANA and ECC systems are essential, and attention should be paid to them, but the cybersecurity relationship between S/4HANA and SAP Solution Manager should be examined. In many instances, the Solution Manager system handles the upgrades, transports, daily operations, and monitoring going into S/4HANA. If the SAP Solution Manager system is compromised, every system connected to it could be at risk of "lateral movement"—from Solution Manager into other SAP systems.



Article by
Barry Snow
Technical Account Manager,
SecurityBridge

You have undoubtedly spent time and resources protecting your ECC and S/4HANA primary systems. Solution Manager is hooked up, too—it's part of this system. Indeed, this link in the information chain must be secured just like all the others. All ends of an interface must be hack-resistant.

Breaches can occur anywhere. But, let's say it happens in Solution Manager, resulting in malicious lateral movement to other SAP systems. Whether or not you secured the SAP S/4HANA system will be of no concern to the public who receives the news that your company's information system—the customer's data—has been breached.

Don't allow your SAP Solution Manager to be a trojan horse, delivering threat actors directly into your S/4HANA system! This article will be in two parts. The first will introduce the facets that comprise the Solution Manager, and the second will explain how to protect the system.

> "Don't allow your SAP Solution Manager to be a Trojan horse, delivering threat actors directly into your S/4HANA system!"

What is SAP Solution Manager?

SAP Solution Manager is a centralized management platform that orchestrates and optimizes the operation of all other SAP systems within the enterprise. It can be considered the home of many separate management functions. In addition to implementation support, monitoring, and administration, Solution Manager is known for its Change and Request Management (ChaRM) solution for Transport Management.

Many "modules" or tools comprise the SAP Solution Manager suite of capabilities. Here are the *Solution Manager applications from SAP Help:*

- ***Business Process Operations***—Your Basis team and Business Process Owners might use this application to examine job runtimes and document backlogs. They can also monitor performance, optimization, automation, and even data consistency, all with an eye toward an associated/impacted Business Process.

- ***Custom Code Management*** – Your ABAP Development team might use this capability to manage the entire lifecycle of the custom code. This could include usage logging by Usage and Procedure Logging (UPL) or its successor ABAP Call Monitor (SCMON). This logging might consist of information from managed systems where the usage logging from managed systems is extracted, relayed to the Solution Manager, and centrally stored in the Solution Manager.

- ***Change Control Management***—Your Dev and Basis teams might be utilizing this application for any of these capabilities: Change and Transport System (CTS), Transport Execution Analysis (TEA), Change Diagnostics, Central Change Transport System (cCTS), Quality Gate Management (QGM), Change Request Management, and Release Management.

- ***Requirements Management***—This capability can be used as a stand-alone management application or integrated with SAP Project Planning and Management (PPM).

- ***Data Volume Management*** – Your SAP Basis Team and SAP Architects might use this application to supplement your company's overall Data Lifecycle Management. Your company might also have a Data Governance Team (or even a Chief Data Officer) that relies on this application. This application looks at the data volume of your managed systems with a data eye on monitoring, analysis, sizing, forecasting, compression, archiving, allocation, and usage.

- ***IT Service Management (ITSM)***—You might run your internal SAP "ticketing system" out of your Solman system. If enabled, it could also be integrated directly into SAP for your company's SAP vendor support tickets. It could also be integrated with other SAP or third-party help desk ticketing systems.

- ***Test Suite*** – Solution Manager might be used to administer and operate testing in your QA environments. Your SAP Test Lead will know if this is the case.

- ***SAP Engagement and Service Delivery*** – Utilized if your company engages with SAP Services.

- ***Project Management*** – Integrates with SAP Best Practice packages.

- **Process Management**– Connects solution documentation with project management and requirement management.

- ***Landscape Management***—Your Basis team uses this capability to gather data from the existing SAP system landscape directory (SLD) and agent data from the technical systems. This data is then collected into the Landscape Management Database (LMDB).

- ***Application Operations*** – Comprises multiple sets of tools across the following categories (see link for more details):

– System and Application Monitoring
– Root Cause Analysis and Exception Management
– Technical Analytics and Dashboards
– Technical Administration

As evidenced above, the SAP Solution Manager suite of capabilities is extensive, and all facets must be adequately secured from bad actors. The SAP Solution Manager is equally essential to the ECC and S/4HANA regarding cybersecurity measures due to its position as the go-between for many other systems. Now that you understand what the Solution Manager is and does, part two will look for ways to protect it.

About Security Bridge

Real-time Intrusion Detection and Vulnerability Monitoring for SAP® applications. SecurityBridge is the first and only holistic, natively integrated security platform, addressing all aspects needed to protect organizations running SAP from internal and external threats against their core business applications. SecurityBridge's unique approach to protecting SAP NetWeaver, ABAP, and S/4HANA platforms reveal exploits, and uncovers previously unknown vulnerabilities, directing and enabling remediation before any harm is done.

About Barry Snow

Barry Snow is the Technical Account Manager at SecurityBridge, where he leverages over a decade of experience in SAP cybersecurity and technical account management. Before joining SecurityBridge, Barry served as a Technical Account Manager at Onapsis, providing strategic guidance and customer advocacy in SAP cybersecurity, including managing customer renewals, expansions, and license oversight. He has a rich background in implementing and optimizing cybersecurity solutions, having worked as a Professional Services Implementation Engineer, where he advised on threat remediation, incident monitoring, and SIEM integration. Barry also consulted for IBM and RHEA Group as an Implementation Project Manager, overseeing the rollout of the Onapsis Platform, ensuring customer success through comprehensive implementation and customer retention strategies. Barry's expertise spans SAP vulnerability management, patch management, and cybersecurity best practices, making him a trusted advisor for organizations looking to enhance their SAP security posture.

Article by Barry Snow

Clarus Partners Advisors Launches AkuCalc, Simplifying Sales Tax Calculations for Businesses

AkuCalc by Clarus Partners empowers businesses with fast, accurate, and automated tax calculations, freeing them from complex regulations and manual processes.

Clarus Partners Advisors, a leading provider of indirect tax solutions, announced the launch of AkuCalc, a user-friendly and powerful sales tax calculation software designed to streamline tax compliance for businesses of all sizes.

AkuCalc empowers businesses to:

- ***Accurately Calculate Sales Tax:*** Automate sales tax calculations across all US jurisdictions, ensuring accuracy and minimizing the risk of errors.
- ***Simplify Compliance:*** Easily navigate complex tax regulations with an intuitive interface and automated workflows.
- ***Reduce Costs:*** Streamline tax processes and reduce the time and resources spent on manual calculations.
- ***Integrate Seamlessly:*** Integrate seamlessly with popular accounting software such as QuickBooks, NetSuite, Epicor, WooCommerce, Microsoft Dynamics 365, and SAP.

The Supreme Court's Wayfair decision significantly impacted sales tax compliance for businesses, requiring them to collect and remit sales tax in jurisdictions where they previously had no physical presence. AkuCalc helps businesses navigate this new landscape by:

- ***Automating Taxability Determinations:*** Automatically determine taxability based on up-to-date tax rules and customer locations.
- ***Streamlining Reporting:*** Simplify sales tax reporting with automated workflows and easy-to-use reporting features.

"We understand the challenges businesses face with the evolving sales tax landscape," said Jeff Mallory, CEO of Clarus Partners Advisors. "While sales tax software exists with more bells and whistles, it can be expensive and cumbersome for businesses with straightforward tax needs. AkuCalc empowers 95% of all businesses with a user-friendly platform that is a fraction of the cost of our competitors."

AkuCalc is part of AkuSuite, the only suite of tax software solutions created and serviced by indirect tax professionals. AkuSuite also includes AkuCert for exemption certificate management and AkuLicense for business license compliance. To learn more about AkuCalc and how it can simplify your sales tax calculations, visit *https://www.akucalc.com.*

About Clarus Partners Advisors

Clarus Partners Advisors is a leading provider of indirect tax solutions, offering a comprehensive suite of services including tax consulting, compliance, and software solutions. With a team of experienced tax professionals, Clarus Partners helps businesses navigate complex tax challenges and achieve significant cost savings. Their services include: sales tax compliance, sales tax consulting, exemption certificate management, indirect tax outsourcing, business license compliance, and unclaimed property. For more information about Clarus Partners Advisors, visit https://www.claruspartners.com or call 614-362-2730.

rootstock MANUFACTURING ERP

Second Annual Survey

State of AI in Manufacturing

Rootstock's AI Survey Shows 82% of Manufacturers Increasing AI Budgets for 2025 with Rising Need for AI-Ready ERP Solutions

Second annual survey shows year-over-year growth in AI adoption and spending, as well as ongoing shift towards Gen AI and predictive tools in manufacturing

Rootstock Software, a recognized leader in the ERP space, today announced findings from its 2nd Annual State of AI in Manufacturing Survey, revealing ongoing momentum for AI adoption within the industry. The survey, based on insights from over 369 manufacturers across the U.S., U.K., and Canada, highlights key trends in AI usage, investment priorities, and the crucial role of ERP solutions. As AI-driven transformations accelerate, 82% of surveyed manufacturers report plans to expand AI budgets over the next 12-18 months, with 23% expecting significant increases of 26-50%.

AI's increasing role in enhancing efficiency, supply chain resilience, and production capabilities points to a growing recognition of AI's ability to impact critical operations. "As AI applications mature, manufacturers are turning to ERP solutions to anchor their AI investments, ensuring seamless data flow and actionable insights across their organizations," said *Raj Badarinath*, Chief Product & Marketing Officer at *Rootstock Software*. "This survey reinforces the need for a robust digital infrastructure as AI becomes integral to strategic decision-making in manufacturing."

Key findings from the *2025 State of AI in Manufacturing Survey* include:

- ***AI Adoption and Usage Trends:*** The survey shows that over 77% of manufacturers have implemented AI solutions, a rise from 70% in 2023, with applications spanning from production (31%) to inventory management (28%) and customer service (28%)—reflecting AI's growing role in optimizing day-to-day operations.

- ***Preference for Copilots:*** Manufacturing professionals favor "copilots" (53%), which support human roles,

rather than fully autonomous agents which could replace human resources. This indicates a strong preference for collaborative AI capabilities that enhance workforce productivity while maintaining human oversight.

- ***Expanded AI Applications:*** AI for supply chain management (49%) and big data/analytics (43%) rose as leading drivers for AI investment, highlighting a strategic focus on balancing demand, supply, and production with AI's predictive capabilities.

- ***ERP's Central Role in AI Adoption:*** ERP solutions remain crucial for successful AI usage, with manufacturers relying on an ERP to contextualize and manage data. However, 56% of manufacturers expressed uncertainty about their ERP systems' readiness for AI integration, underscoring the ongoing need for ERP modernization.

Despite significant advancements, manufacturers still face obstacles to AI adoption. A lack of internal expertise (45%) and integration challenges with existing systems (44%) remain top barriers. The skills gap is increasingly addressed through training and upskilling (60%), with additional reliance on intuitive AI technologies that help ease the transition (41%).

"We are witnessing a pivotal moment where manufacturers are adopting AI not just as a productivity tool but as a strategic asset," added Badarinath. "Manufacturers who embrace AI within a strong ERP will be well-positioned to lead in an AI-driven market."

For a complete overview of survey findings and insights into the future of AI in manufacturing, download Rootstock's full report:

https://clouderp.rootstock.com/state-of-ai-manufacturing-survey-2025

About Rootstock

Rootstock Software provides the leading Manufacturing Cloud ERP, which empowers hundreds of manufacturers to turbocharge their operations in today's dynamic, post-pandemic world. Natively built on the Salesforce Platform, Rootstock delivers a future-proof solution. With it, manufacturers gain the agility to continually transform their business to meet evolving customer needs, navigate emerging challenges, and accelerate success. In addition, the "connectability" of Rootstock Cloud ERP gives manufacturers 360° visibility to collaborate with suppliers, trading partners, and the broader value chain. As Rootstock continues to grow, stay tuned to the company's latest customers, career opportunities, and LinkedIn posts.

From Rootstock's 2025 State of AI in Manufacturing Survey

Sage Named a Major Player in IDC MarketScape for Accounts Receivable Automation for SMBs

Sage delivers innovative Accounts Receivable automation capabilities that drive efficiency, improve cash flow, and empower SMBs to thrive in a competitive landscape

Sage, a leader in accounting, financial, HR, and payroll technology for small and medium-sized businesses SMBs announced its recognition as a Major Player in the IDC MarketScape: Worldwide Accounts Receivable Automation Applications for Small and Midmarket Businesses 2024 Vendor Assessment1.

The report stated, "Sage offers a highly configurable platform that leverages standard and custom fields. Universal connector architecture enables both multi-entity support and multi-ERP integration. [...] Consider Sage if you are a company looking for a SaaS solution with extensive ERP integrations."

Empowering SMBs with Advanced AR Automation

With SMBs increasingly focused on optimizing cash flow, Sage simplifies invoicing, offers multi-channel payment options, streamlines collections, integrates with customer relationship management (CRM) systems, provides accurate sales tax calculations and delivers actionable insights through advanced reporting. The Sage AR automation platform integrates seamlessly across its financial and enterprise resource planning (ERP) systems, including Sage Intacct and Sage Business Management Solutions (BMS). These capabilities allow SMBs to replace manual processes with intelligent automation, enabling businesses to streamline workflows and improve efficiency.

As industries embrace digital transformation, Sage products demonstrate a commitment to innovation, particularly in integrating AI-driven capabilities and adapting to regulatory changes across regions, is empowering SMBs to remain competitive and resilient. Key features include automated customer communications, a self-service payment and account portal, and forecasting tools that empower businesses to make smarter financial decisions.

"SMBs are the backbone of the global economy, and efficient cash flow management is crucial for their success," said Gordon Stuart, VP, Product Strategy and Operations, Sage. "At Sage, we are proud to support our customers with solutions that not only automate accounts receivable processes, make getting paid securely, easier and faster, but also provide the insights they need to grow and thrive. We believe being recognized by the IDC MarketScape reflects our commitment to delivering innovative technology that meets the evolving needs of our customers."

Innovating for SMB Success

Managing accounts receivable is a persistent challenge for SMBs, where delays or inaccuracies can significantly impact cash flow. Sage products' configurable AR platform is designed to address these challenges with multi-ERP integration and universal connector architecture, offering SMBs the flexibility and scalability they need to grow. Additionally, the collections activity management features a unified dashboard where users can track communications, automate workflows, and maintain complete oversight—all from one place.

Sage has a robust partner ecosystem which also plays a pivotal role in supporting SMBs with tailored solutions that align with their unique requirements, whether by business size and maturity, geography they operate in, or by industry vertical.

By introducing solutions such as Sage Connect for AR, designed specifically for small businesses, Sage is helping streamline processes like automated reminders, customer account portals, and online payment options. These innovations empower SMBs to reduce admin workloads, accelerate cash flow, and build stronger customer relationships.

Stuart continued: "We understand that every invoice counts for SMBs, which is why we focus on enhancing Sage AR automation and creating new tools such as Sage Connect, that are both intuitive and transformative. With Sage, businesses can automate repetitive tasks, gain real-time insights, and concentrate on what truly matters—driving their growth and delivering value to their customers."

To learn more about Sage AR automation and Sage Connect, visit:

Sage AR Automation
Sage Connect

About Sage

Sage exists to knock down barriers so everyone can thrive, starting with the millions of small- and mid-sized businesses served by us, our partners, and accountants. Customers trust our finance, HR, and payroll software to make work and money flow. By digitizing business processes and relationships with customers, suppliers, employees, banks and governments, our digital network connects SMBs, removing friction and delivering insights. Knocking down barriers also means we use our time, technology, and experience to tackle digital inequality, economic inequality, and the climate crisis.

About IDC MarketScape

IDC MarketScape vendor assessment model is designed to provide an overview of the competitive fitness of technology and service suppliers in a given market. The research utilizes a rigorous scoring methodology based on both qualitative and quantitative criteria that results in a single graphical illustration of each supplier's position within a given market. IDC MarketScape provides a clear framework in which the product and service offerings, capabilities and strategies, and current and future market success factors of technology suppliers can be meaningfully compared. The framework also provides technology buyers with a 360-degree assessment of the strengths and weaknesses of current and prospective suppliers.

Retail Public Cloud ERP and AI Shopping Assistant Headline SAP Innovations at NRF 2025

SAP also debuts solutions to address loyalty gap as new survey results show 80% of U.S. consumers feel undervalued by brands

SAP announced a slate of new solutions and capabilities catering to the retail industry at *Retail's Big Show*, the flagship industry event hosted by the National Retail Federation.

SAP's top news is the general availability of the SAP S/4HANA Cloud Public Edition, retail, fashion, and vertical business solution. This enterprise resource planning (ERP) solution is built specifically for retailers and marks a significant milestone in bringing tailored ERP capabilities to retailers of all sizes worldwide.

"SAP's announcement of an all-in-one platform tailored for retail represents a meaningful differentiator in the market," said Leslie Hand, Group Vice President for IDC Retail Insights. "Retailers often struggle with fragmented solutions that excel in some areas but cannot deliver the end-to-end integration necessary for seamless retail operations."

"With *SAP S/4HANA Cloud Public Edition, retail, fashion, and vertical business*, SAP brings the same best-in-class functionality trusted by market leaders

and recognized worldwide, now tailored to meet the scale, price and time-to-value required by fast-growing organizations," said Balaji Balasubramanian, senior vice president and global head, Commerce and Consumer Industries at SAP SE. He added that retailers, in order to deliver personalized experiences, need an ERP system with retail-specific processes and capabilities that are tailored to the complexities of merchandising, store operations, and retail supply chains. Balasubramanian notes that generic ERP systems lack these end-to-end retail processes and aren't flexible enough for today's digital consumer.

SAP's latest offering addresses these challenges through a solution built on the flexibility of public cloud architecture that unifies industry-specific processes, data and AI and offers out-of-the-box integrations. It also provides a comprehensive suite of capabilities designed to streamline processes, enhance customer experiences and drive sustainable growth. The new platform offers integrated management of finance, procurement and merchandising, with unified operational data and ready-to-use AI.

New loyalty solution to feature data-driven personalization

SAP also announced a new loyalty management solution aimed at retailers and consumer packaged goods companies, scheduled for release in the second half of 2025.

According to *new research from SAP Emarsys*, four in five (83%) U.S. consumers feel undervalued by the brands they remain loyal to, with many questioning their loyalty altogether. This new solution aims to equip organizations with experiential journeys and personalized, real-time offers to help earn customer loyalty through integration with the SAP Commerce Cloud, SAP Service Cloud, SAP Emarsys and SAP S/4HANA Cloud Public Edition, retail, fashion, and vertical business solutions.

Key features include:

- Loyalty profiles that connect every shopper with a cloud-based loyalty wallet, facilitating targeted and personalized offers, entitlements, and real-time basket analysis.
- Multi-brand loyalty management, as well as shared loyalty programs with partners that centralize loyalty programs across regions and markets, enabling combined brand programs for gaining market share.
- A single place for omnichannel promotion planning with real-time redemption to deliver any type of offer, digital payment and gifting to all customers on any channel.
- Loyalty journey planning that delivers experiential omnichannel journeys tailored to customer needs through personalized commerce, marketing, service and retail interactions.
- Quantifiable metrics that track promotion performance and loyalty-related liabilities, linking to financial systems to measure ROI, and enable settlements with the member and partner brands.

Artificial intelligence to make online shopping easier than ever

SAP also announced the general availability of an AI shopping assistant in the first half of 2025. This intelligent assistant, delivered with the *SAP CX AI Toolkit*, expands the existing AI capabilities of SAP Commerce Cloud, transforming the online shopping experience through natural language conversations that help customers quickly find exactly what they need.

Infosys and Tennis Australia Create New Generative AI Innovations at the Australian Open 2025

Launch of 'Beyond Tennis': A new generative AI tennis league with AI players and data-driven tournaments

Infosys, a global leader in next-generation digital services and consulting, in partnership with *Tennis Australia*, has unveiled its latest suite of AI-driven features and platforms for *Australian Open* (AO) 2025, marking another milestone in the seven-year partnership between the two organizations. It further advances their joint vision of creating a more immersive experience of tennis through AI-driven technology innovations.

These innovations, powered by *Infosys Topaz*, an AI-first suite of offerings using generative AI technologies, will redefine fan engagement, empower players and coaches, and expand the boundaries of digital interactivity in tennis.

'Beyond Tennis' (World's First Gen AI league in tennis): A unique breakthrough is *'Beyond Tennis'* powered by Infosys, the world's first generative AI-powered tennis league. This fan-driven digital experience will provide year-round interactivity, allowing users to connect with virtual tennis players, train their teams, and compete in AI-generated tournaments. Fans will interact with 16 AI-crafted virtual players spread across eight teams. Envisioned as "The Slam That Never Stops," the league will enhance the sport's affinity among younger Gen Z audiences while ensuring their safety in digital environments, enabled by responsible AI framework.

Agentic AI to drive fan engagement with AI Commentary: Australian Open 2025 will feature AI Commentary in the Infosys Match Centre on AO digital properties, on the website and the app. Using out of the box large language models AI Commentary will provide byte-sized insights at every match moment.

VR AI Stadium: The Infosys Fan Zone at Melbourne Park steps into the future, introducing a new VR AI Stadium where fans can create stunning virtual courts. Using a new generative AI speech-to-image feature, fans can step onto a galaxy- or nature-inspired court, or even a 1970s themed court, and play a game of tennis.

Infosys is helping the Australian Open with AI, video analytics, and machine learning tools. Using AI Videos, players and coaches continue to get access to post-match reviews and pre-game advance video analysis. The AI Shot of the Day feature helps AO's media team meet growing digital content demands, enabling rapid creation and sharing of social media-ready clips to feature captivating moments on court.

The Infosys Fan Zone at Melbourne Park remains climate active, with its carbon footprint fully offset and structures fully recyclable. Infosys and Tennis Australia are also advancing the Future Leaders Program powered by Infosys Springboard, the company's digital learning and collaboration platform for the community, that provides participants with the opportunity to learn transferrable skills in areas such as inclusion, leadership, technology, and design thinking. The participants will also get a glimpse of a generative AI future by visiting the Infosys Fan Zone at Melbourne Park.

Andrew Groth, Executive Vice President - Asia Pacific, Infosys, said "Each year at the Australian Open, we have pushed the boundaries of technology to fuel fan engagement and player performance. Infosys is proud to bring the latest generative AI innovations to court, from the fan-driven Beyond Tennis league to AI-amplified VR experiences, leveraging our industry leading AI-suite of offerings Infosys Topaz. Through this collaboration with Tennis Australia, we are enabling truly innovative platforms for fans, players, coaches, and media to engage with the sport."

Craig Tiley, CEO of Tennis Australia, and Australian Open Tournament Director, said, "For the past seven years, Infosys has helped Tennis Australia to raise the bar and serve up new experiences for fans using digital technologies. We're excited to see the leaps being made with AI at AO 2025. AI is enabling new dimensions of interactivity for fans and insight for players, not to mention the speed and scale it brings to our content delivery. It's an exciting leap forward that showcases how technology and AI is transforming tennis."

Follow all the action from the tournament on *AusOpen.com* and discover more about the partnership at *Infosys.com/AusOpen.*

About Infosys

Infosys is a global leader in next-generation digital services and consulting. Over 300,000 of our people work to amplify human potential and create the next opportunity for people, businesses and communities. We enable clients in more than 56 countries to navigate their digital transformation. With over four decades of experience in managing the systems and workings of global enterprises, we expertly steer clients, as they navigate their digital transformation powered by cloud and AI. We enable them with an AI-first core, empower the business with agile digital at scale and drive continuous improvement with always-on learning through the transfer of digital skills, expertise, and ideas from our innovation ecosystem. We are deeply committed to being a well-governed, environmentally sustainable organization where diverse talent thrives in an inclusive workplace.

New Epicor Prism Vertical AI Agents Revolutionize How Frontline Workers Surface and Act on Enterprise Intelligence

AI-Driven Conversational ERP Tailored Specifically for the Supply Chain Industries Simplifies Complex Tasks and Speeds Productivity

Epicor, a global leader of *industry-specific enterprise software* to promote business growth, launched Epicor Prism, a network of vertical AI agents built specifically for the supply chain industries. Through intuitive, AI-driven conversational ERP, Epicor Prism simplifies the way businesses and their workers access answers and recommendations to complex business needs and enables organizations to take faster action. Epicor Prism is initially available to be integrated with *Epicor Kinetic*, part of the *Epicor Industry ERP Cloud.*

"Epicor Prism helps users unlock the power of their data to make informed decisions and take action in ways that were previously unimaginable," said Arturo Buzzalino, Chief Innovation Officer at Epicor. "Through simple, natural language queries, Epicor Prism's vertical AI agents quickly source and provide the best answer or recommendation to a user's need. This helps reduce the friction in how users have traditionally extracted intelligence from their enterprise data, empowering them with critical insights without the technical barriers."

Epicor Prism is purpose-built for Epicor's unique vertical industry-specific data structure, which has been developed over more than 50 years of innovating across the supply chain industries. Users engage with Epicor Prism in the context of their native Epicor ERP platform, while a network of vertical AI agents collaborate behind-the-scenes to address a user's request.

The ways Epicor Prism's vertical AI agents can be used to drive efficiency and speed in solving complex business needs are vast. For example, users can leverage Epicor Prism as a code assistant to create automated business processes more quickly, or use conversational ERP to access production, purchasing, and logistics insights without the need to know where files are located. Epicor Prism can also automate supplier communications to speed purchasing, enabling users to automatically send RFQs to their supplier network and parse and translate quotes to determine the best price and fastest delivery.

"Epicor Prism will allow us to reduce many mundane tasks so our staff can prioritize more strategic efforts," said Tyler Madsen, Director at *Madsen's Custom Cabinets*, a Canadian manufacturer and part of the Epicor Prism Early Adopter Program. "For example, we spend many hours each week manually updating hundreds of line-item due dates that correlate to the jobs we have. With Epicor Prism, we believe we're going to free significant time for our team to focus less on scheduling and more on production and meeting customer demand. That's really adding value to our business."

Through the power of AI, Epicor is fundamentally reimagining how ERP software can and should serve the supply chain industries and their workers. Guided by *the company's cognitive ERP vision* to transform traditional ERP from a system of record to a system of action, Epicor differentiates with a unique combination of industry-focused ERP, data structure, and AI. This helps users surface insights with high speed and accuracy to solve industry-focused challenges in the familiar context of their Epicor solutions.

"AI-infused ERP will drive significant advancements in decision-making, forecasting, customer service, and overall operational efficiency," said Mickey North Rizza, group vice president of Enterprise Software at IDC. "Epicor Prism is a dynamic tool that can not only help Epicor users more easily solve their industry-focused challenges, but also help propel those industries quickly into a new era of technological empowerment."

About Epicor

Epicor Software Corporation equips hard-working businesses with enterprise solutions that keep the world turning. For more than 50 years, Epicor customers in the automotive, building supply, distribution, manufacturing, and retail industries have trusted Epicor to help them do business better. Innovative Epicor solution sets are carefully curated to fit customer needs and built to flexibly respond to their fast-changing reality. With deep industry knowledge and experience, Epicor accelerates its customers' ambitions, whether to grow and transform, or simply become more productive and effective. Visit www.epicor.com for more information.

More Businesses Are Breaking Free from Basic Accounting Software and Graduating to Acumatica Cloud ERP

Acumatica customers Mid-States Companies, IOC Construction and Happy Valley Embrace Cloud ERP to Transform Operations and Accelerate Success

An increasing number of small and mid-sized businesses (SMBs) are outgrowing their basic accounting software due to evolving operational needs. For many organizations, graduating to a comprehensive cloud ERP solution such as *Acumatica* is a pivotal step in overcoming growing pains, including managing complex financial processes, accessing data for better decision-making and driving operational efficiency for long-term success.

"An improving economic environment has resulted in more companies telling us they've maxed out on their 'starter,' or legacy accounting software and need something more from their business management solution," said John Case, CEO of Acumatica. "To navigate the challenges of rapid expansion, these businesses are looking to move beyond static and disconnected data with technology that delivers real-time insights, seamless automation and the ability to scale without limits. Our cloud ERP platform is built specifically to meet those needs."

Mid-States Companies, *IOC Construction* and *Happy Valley* are just three of the *hundreds* of organizations that have *taken their business to the next level* by transitioning to Acumatica Cloud ERP.

Mid-States Companies

In 2020, a powerful land hurricane hit several Midwest states, which resulted in $11.9 billion in damages, including 90,000 square miles of agricultural land rife with grain silos, hay storage facilities, barns and agricultural equipment. Although devastating, the destruction created new opportunities for construction firms. Among them was Mid-States Companies (Mid-States), a collection of firms offering design and engineering, millwright, building, material handling equipment, crane and trucking services to agriculture operations and other industries.

Operating on QuickBooks, Excel and legacy systems, executives struggled to keep pace with the 50% jump in revenue the company experienced in the year following the hurricane. The storm and subsequent growth highlighted the need for a better financial platform, and Mid-States implemented *Acumatica Construction Edition* to solve its growing pains. Acumatica empowered Mid-States to streamline financial consolidation, efficiently manage data, enhance customer-facing interactions and scale operations.

"Mid-States has only scratched the surface of what Acumatica can do," said Andrew Pistorius, chief financial officer of Mid-States. "Acumatica as a system allows us to become a more process-based organization. Being processed-based will allow us to scale in a prudent, profitable way and ultimately beneficial to our staff and customers."

IOC Construction

IOC Construction (IOC) experienced similar benefits after moving from QuickBooks to Acumatica. The most impactful result of implementing Acumatica Cloud ERP has been access to unified, comprehensive and timely business data. Access to data has revolutionized IOC's visibility into projects, providing actionable insights into financial health, margins and pipeline performance. With automation tools and a unified platform, IOC has eliminated manual tasks, gone paperless and enhanced customer communication.

"The ability to pull data from Acumatica allows us to understand our customers' journeys. Before, if sales or production were backlogged, we would assume we needed to hire more people. But that was a guess because we didn't know," said Joel Sisto, chief financial officer of IOC. "Good data is the ultimate differentiator to delivering top-tier service to our customers."

Happy Valley

The desire for comprehensive and detailed business data also motivated Happy Valley, a full-service premium cannabis company in Massachusetts, to migrate from QuickBooks to Acumatica. With siloed information and no data-driven insights, Happy Valley could only track the essentials required to run the business and struggled to understand inventory levels and labor costs. Since migrating to Acumatica with the support of *QuantumLeaf*—an Acumatica value-added reseller and independent software vendor specializing in cannabis solutions—Happy Valley has gained access to granular data that will play a vital role in helping the company achieve its growth goals.

"Acumatica helps us grow by delivering granular, batch-specific cost awareness for our work in process, raw materials and finished good inventory," said Sean Corrigan, vice president of operations for Happy Valley. "QuantumLeaf's connected cannabis solution complements Acumatica, giving us the ability to track cannabis lots while driving our business forward in a compressing market and industry. Acumatica is the first platform we feel truly encompasses our business."

As businesses like Mid-States, IOC and Happy Valley thrive with Acumatica, the company's vibrant community of customers, partners and employees remains a driving force behind its ongoing innovation and shared success. In two weeks, the Acumatica Community will come together in Las Vegas to network and share insights on more customers reaping the benefits of a comprehensive business management solution. Register for Acumatica Summit 2025 by visiting *summit.acumatica.com/*.

Acumatica
The Cloud ERP

About Acumatica

Acumatica Cloud ERP is a comprehensive business management solution that was born in the cloud and built for more connected, collaborative ways of working. Designed explicitly to enable small and mid-market companies to thrive in today's digital economy, Acumatica's flexible solution, customer-friendly business practices and industry-specific functionality help growing businesses adapt to fast-moving markets and take control of their future. For more information, visit acumatica.com or follow us on LinkedIn.

How This Managed Print Service Company Embraced the Ever-Evolving Nature of the Workplace and Introduced Alternative Revenue Streams

The managed technology industry is changing and no one knows exactly where the market is headed. Reductions in print volumes and the rising uptake of remote working has caused the sector to shift, and as such, customer requirements are changing. To maintain stability and meet the ever-evolving needs of their clients, Active8 has sought to introduce new revenue streams and cut unnecessary costs. To successfully leverage new opportunities, and provide a high level of service for its clients, Active8 needed an industry-specific software solution to simplify business operations, drive efficiencies and support future growth.

OVERVIEW
Active8
www.a8mt.co.uk
Newark, UK

INDUSTRY
Managed Technologies

SOLUTIONS
e-automate
Printanista
MobileTech
KnowledgeSync

The Impact

Prioritising the customer

Using systems that can talk to each other has driven efficiency across the business, improving both internal processes and customer service. Certain tasks will always require a human, but by automating those processes that don't need high levels of human interaction, staff are freed up to focus on better serving customers.

Gaining a more accurate overview

With an enterprise resource planning (ERP) and customer relationship management (CRM) system in place, all key data is accessible via a single data-led dashboard, allowing for more detailed and accurate analysis of business performance.

Easy implementation

Full product demonstrations and attentive specialist support teams ensure seamless implementation and company wide roll-out meaning that from day one the team has been in a position to make the most of the technology.

Who is Active8?

Celebrating its 10th anniversary this year, Active8 Managed Technologies has been a trusted supplier of quality end-user business services for organisations across the UK since 2013 - providing three core services: Managed Print Services (MPS), IT Services and Hosted Telephony.

Although its predominant offering for a decade, Active8's ambitions have always looked beyond providing print services alone, to become long-term business partners for its customers, helping them to adapt and thrive in the ever-changing environment.

With its customer's needs at the very core of everything it does, Active8's ethos is simple - the company looks to provide access to high-quality products and technical support services, helping its partnered customers augment their business and aid growth.

The Challenges

The managed technologies industry is experiencing a volatile trading environment, with recent socio-economic factors, such as COVID-19, acting as a catalyst for reduced print volumes and remote working practices. As such, Active8 recognised the importance of being proactive and adaptable to embrace the shift.

With a focus on diversifying services to meet the evolving needs of clients, and maintaining stability in an unstable market, Active8 has looked to introduce new revenue streams, while reducing any superfluous costs.

As every print or copier device has an IP address and sits within a network, the MPS industry is well positioned for diversification within the technology sector. For example, IT services and VoIP phones are highly relevant and viable options for expansion. As a leading MPS provider, Active8 understood that refocusing on new opportunities and embracing alternative earnings would be crucial steps towards future growth.

Looking to simplify the journey and drive efficiencies across all aspects of the business, the correct industry-specific software would be able to withstand the rapid growth of Active8's diverse customer base, while facilitating the compilation of data-driven reports.

> "With ten years experience operating in the Managed Print Services (MPS), IT Services, and Hosted Telephony industry, Active8 Managed Technologies prides itself on supporting its customers and the needs of the modern workplace."

The Solution

Having enjoyed a period of rapid growth, Active8 approached ECI in 2020, looking for a fully integrated management solution. ECI e-automate, Printanista, MobileTech and KnowledgeSync were implemented shortly after.

Prioritising scalability whilst searching for the ideal ERP system, Active8 understood that its ambitious growth plans should not be hindered or held back by back-end systems. Alongside this, specific features such as robust financial packages and extensive integration options drew Active8 towards ECI and its portfolio of specialised products.

Underpinning all product selection decisions was the desire to streamline and simplify operations by consolidating all data into a single source, enabling Active8 to make data-driven decisions while effectively managing multiple new ventures in an ever-changing market.

The Impact

The introduction of e-automate, Printanista, MobileTech and KnowledgeSync, has transformed how Active8 manages its MPS offering. Nick Swindin, service ops director at Active8, discusses the drive behind implementing ECI's software solutions, "customers are our number one priority and we're determined to provide organisations of all sizes with access to highquality products and technical support services. Our aim is to be more than a service provider, building long-term business partnerships that can help our customers to evolve and prosper."

Having previously relied on multiple, disparate business management systems, Active8 found that attempts at gaining an accurate business overview was near impossible, as well as a significant drain on staff time.

"Now, with our ERP and CRM systems connected with a single dashboard, pulling quick and impromptu updates is easy. We can analyse business performance over time and immediately identify any concerning trends, allowing us to deliver for our customers. Data extraction from ECI is significantly more advanced than previous systems I've experienced over my 30 years in the office technology sector."

With accounts managed in the same central location, hours of staff's time is saved each month that would have previously been spent collating spreadsheets and manually inputting data. "ECI's e-automate software has enabled us to boost contract profitability. Since deploying the e-automate software, we have also introduced Printanista - enabling us to more accurately monitor machines from a distance, and remotely capture important data around metre readings, toner alerts and service calls. "

Managing market fluctuations is a common challenge for any business, of any size. Nick explains how implementing the right software can help companies thrive, "in the past three years, the market has fluctuated significantly. The adoption of hybrid and remote working, as well as businesses looking to cut costs due to unstable economic environments, has made managing supply and demand a real challenge. To survive, you have to ride the tidal wave and embrace the shift."

"We can't predict exactly where the MPS market is heading, but with diversification playing such an integral role in ensuring businesses stay buoyant, there's no point investing in systems that are unable to keep up. Combining live, real-time data with a vast number of complementary products, features and third party integrations, our staff are well equipped with highly intelligent systems to manage demand fluctuations, no matter which way they turn."

Investing in new software can be daunting, with many businesses concerned by the potential disruption caused during the implementation phase. Nick recalls working closely with the ECI solution consultants team to specify aims and determine goals before exploring product options, 'I know the customer service reps are always onhand whenever we need them, sharing expert knowledge and a true understanding of how we can achieve the most from our investment."

"With a single, consolidated ERP system with lots of integrations and 'bolt on' features- data-led decision making is easy."

"Following a full demonstration of e-automate, Acsellerate and KnowledgeSync, the whole team could immediately visualise how a fully integrated, cloud-based approach would transform the business and their day-to-day roles."

Investing in success Summarising the benefits, Nick said, "Ultimately, every business will view the purpose of their business management software in a slightly different way. For us, our ERP system is a powerful contract database that feeds numerous additional features, delivering efficiency across different aspects of our business."

"Partnering with ECI was driven by our pursuit of scalability and future preparedness - as an aggressive business with aggressive growth bands. Offering vast possibilities for automation, ECI's specialised software solutions allow us to run everything under one roof, from one database, creating a cohesion across Active8 like we've never experienced before."

About ECI

ECI Software Solutions provides cloud-based business software for running small and mid-sized businesses end to end. Built by experts in manufacturing, residential construction, field Xservice, building supply, office technology, and wholesale/retail distribution industries, ECI's industry-specific software connects businesses and customers, improving visibility, operational efficiency, and profitability. With ECI, businesses seamlessly integrate sales and marketing, business intelligence, CRM, data and analytics, ecommerce, mobile apps, and payment processing. With more than 30 years of industry leadership, ECI is trusted by 24,000 customers in more than 80 countries globally. Headquartered in Westlake, Texas, it has offices in the U.S., Canada, Mexico, the United Kingdom, the Netherlands, and Australia. For more information, visit www.ECIsolutions.com.

Novaria Group

Single Source of Truth Lifts Profitability and Productivity for Leading Aerospace Component Manufacturer

Company Facts

- Location: Fort Worth, TX
- Specialist Industry: Aerospace and Defense Manufacturing
- Website: www.novariagroup.com

Challenges

- Disparate, outdated software solutions
- Inability to easily access data to inform decision-making
- Siloed systems impeded economies of scale
- Tribal knowledge hindered efficiency

Benefits

- Data-driven insights helped to enable cost accounting and also helped to deliver millions of dollars in profitability
- Reduced auditing costs
- Created standardized operating procedures
- Strengthened supplier leverage position

Charting Success

Founded in 2011, Novaria Group is a privately held leading precision component manufacturer that delivers optimum performance and sustainable growth to the aerospace and defense marketplace. Since its inception, Novaria has expanded rapidly, acquiring two to three new companies each year, and achieving an enviable ~20% growth rate. In 2020, in a strategic move to facilitate continued success, Novaria hired Tim Koeneman as Vice President of IT to implement the systems required to scale. "We needed to adopt smart technology that would deliver control and visibility to enable us to focus on building the business," he recalled. "Sophisticated investors expect us to show gross margin by product and profitability quarter-over-quarter. We simply didn't have the systems to do that."

Koeneman elaborated, "Our approach is to maintain the entrepreneurial spirit of the companies we acquire. We buy a good company and then invest in talent, processes and technology."

A Strategic Choice

A thorough evaluation led Novaria to select Epicor® Kinetic deployed on the government cloud. Koeneman explained why Epicor was chosen: "I was not interested in maintaining an on-premises footprint. We want to focus on the business, not on backing up SQL servers." He continued, "Cloud-based Epicor Kinetic has aerospace manufacturing expertise and could be implemented without having to make customizations, which was critical. The cloud also eliminated the technology obsolescence risk that is inherent in many of the companies we acquire who have outdated systems."

Currently encompassing 18 business units, Novaria has migrated eight companies—roughly 50% of total revenue—to Epicor Kinetic on the government cloud and in-progress to deploy Epicor Automation Studio.

Implementations are smooth and predictable and have delivered an unexpected but very welcome benefit. "As we've undertaken Business Process Reengineering in the context of implementing Epicor, we've been able to move from a tribal knowledge base to a documented set of procedures," Koeneman shared.

"Cloud-based Epicor Kinetic has aerospace manufacturing expertise and could be implemented without having to make customizations, which was critical. The cloud also eliminated the technology obsolescence risk that is inherent in many of the companies we acquire who have outdated systems."

He added, "Time-to-market is a big advantage with Epicor Kinetic. It's straightforward, easy-to-use, and is built for manufacturing, so it works right out of the box."

Epicor Kinetic on the government cloud also facilitates approximately 30% of Novaria business that supports the defense industry. Epicor Kinetic on the government cloud also facilitates approximately 30% of Novaria business that supports the defense industry. All U.S. defense manufacturers must comply with International Traffic in Arms Regulations (ITAR), and utilizing the government cloud aids in meeting these compliance requirements.

Precision in Action

Koeneman's objective is to move as many Novaria companies as possible to the platform. "Epicor has provided an unprecedented degree of visibility across our businesses and allowed us to adopt a shared-services model," he noted. "The Novaria companies on Epicor can utilize the same controllers and processes for AR/AP. And it has given us a standard language."

One of the most significant benefits of Epicor has been gaining a new level of clarity and control around pricing, empowering Novaria to adopt an actual costing method. "Epicor allowed us to make more informed decisions, which has been especially important during the recent inflationary period," Koeneman said.

"In addition, we have improved Novaria's leverage with suppliers because we can demonstrate total purchases across the businesses, not just by individual division."

Data Points the Way

Another measurable benefit has been a substantial decrease in Novaria's financial auditing fees. The businesses that have migrated to Epicor have created a standardized, repeatable process that has streamlined audits. Koeneman divulged, "The eight companies on Epicor can be audited as one, effectively cutting the number of companies to audit nearly in half."

Moving businesses to Epicor has helped hold audit costs stable even as they have acquired more companies. Additionally, access to the data empowers Novaria's C-suite to have better insights into the businesses on Epicor and have data-driven conversations.

> "Epicor Professional Services has been a significant contributing factor to our success. It's a quality team that works with passion and humility."

Koeneman is currently evaluating Epicor Grow to replace Power BI. Low-code Epicor Grow, an all-in-one cloud business intelligence solution that will help provide Novaria with a standard cross-company corporate dashboard. He mentioned, "Epicor Grow is ERP-agnostic, so even our companies that are not yet on Epicor Kinetic can be integrated. We'll be able to easily see daily performance across the entire business."

Redefining Insights

Confidence in moving forward with additional Epicor implementations and modules is due in large part to Koeneman's experience with Epicor Professional Services. He acknowledged, "Epicor Professional Services has been a significant contributing factor to our success. It's a quality team that works with passion and humility."

He emphasized, "Not only are they experts in Epicor but they also bring to bear best practices from across the industry. Epicor consultants have been a big part of our ability to move as quickly as we have and to get the results we achieved."

About Epicor

Epicor Software Corporation equips hard-working businesses with enterprise solutions that keep the world turning. For more than 50 years, Epicor customers in the automotive, building supply, distribution, manufacturing, and retail industries have trusted Epicor to help them do business better. Innovative Epicor solution sets are carefully curated to fit customer needs and built to flexibly respond to their fast-changing reality. With deep industry knowledge and experience, Epicor accelerates its customers' ambitions, whether to grow and transform, or simply become more productive and effective. Visit www.epicor.com for more information.

Q-PAC Systems, Inc.

Fan-Array Maker Q-PAC's Explosive Growth Supported by Acumatica Manufacturing ERP

- Implemented a single, connected, modern manufacturing platform that helps it scale and grow
- Improved customer service, providing a seamless connection between its project configurator QUIPS and Acumatica Manufacturing, which allows data to flow engineering, manufacturing, shipping, and invoicing
- Gained inventory management with visibility into inventory and production costs used to calculate project profitability while also reducing inventory carrying costs
- Automated reporting, saving time while gaining insights on which to make better decisions
- Gained Bill of Materials functionality that sped production and improved revision history access
- Replaced manual data entry with automated processes, saving time

> "We are able to make strategic decisions faster using Acumatica. It creates improved collaboration across departments, which has been really helpful."
>
> -Piro Zisi,
> Supply Chain Manager
> Q-PAC Systems, Inc.

Challenges

Spun out of Mass HVAC in 2019, Q-PAC makes custom Plug-and-Play fan systems for commercial HVAC systems for air handling retrofits and OEMs. Its success stems from having a disruptive product that it delivers and installs quickly. Each fan array is custom-built according to customer specifications, with simple installations and a variety of features for optimizing facilities.

The company sells its fan systems to office buildings, universities, airports, hospitals, and entertainment venues like stadiums and arenas. Because each venue has different requirements, Q-PAC internally designed its ordering software, QUIPS, which automates the selection and design process according to a customer's facility operation and space requirements.

The company operated within Mass HVAC for eight years before being spun out in 2019, says Kevin Van Dyke, Chief Financial Officer.

"We were incubated inside a company that built air handlers, and we were the fan component," he says. "We have a very innovative idea of using EC fans and assembling them in a kitoriented way for new air handlers and retrofit opportunities, allowing us to repair and replace fans in the field."

Each fan array ships as a kit with every component needed to install, assemble, and begin operating in the shortest amount of time. With its patent-pending Quick Connect Box and its wiring system, electricians have cut 75 percent of the time needed to install a unit. With its optional BACnet compatible controller, a system can stand alone without any field-installed controls.

Q-PAC operates on the premise that "Fan systems should be easy; we are easier."

"When it comes to the HVAC component we provide, we are probably the fastest in the industry when it comes to installation," says Luis Burgos, Director of Operations. "We provide a simple service: our products are easy to select, install, and service."

Customers seem to like Q-PAC's easy-to-install fans. "We are averaging around 30% growth," says Van Dyke. "Actually, it's been 40% growth since starting as a standalone company. We'll do close to $32 million this year."

Difficult to Operate on Spreadsheets

When Q-PAC began operating as a separate company, it operated on QuickBooks and Excel spreadsheets. Managing production and inventory was tedious, cumbersome, not always up-todate, and prone to error. It was anything but straightforward but typical for a fast-growing startup.

"We didn't really know our costs at all accurately," explains Burgos. "We didn't have part numbers, and most of the visibility on sales orders was via Excel files. Our operations were very task-oriented, and it was really hard to keep track of the status of orders. We barely even had part numbers."

Without part numbers, executives lacked insights into inventory and project costs, making it difficult to quote projects accurately. The rudimentary and disconnected applications made it difficult and time-consuming to process engineering changes, and assemble bill of materials. Forecasting was difficult.

"We would ship something, and at the end of the year, we could look at the macro view," says Kurt Thomas, Director of Marketing. "But we had no idea what our individual job gross margins were. With QuickBooks, we couldn't dive that deep, and we couldn't link all of our inventory. Plus, we were using so many different systems and many different Excel sheets, so linking all those just didn't make sense."

Part of the difficulty in accessing product profitability stemmed from the custom nature of its fans, and the different configurations that customers needed. To make it easier for customers to order, Q-PAC created custom software called QUIPS to automate the fan system selection and design process according to the variables provided by the client. The possibilities included choosing from more than 4,000 parts.

The company's fast growth, frustration with manual work, and disconnected systems prompted them to look for better systems to run the company. "We reached the maximum potential of Excel to run a

business.," Burgos says. "We found very clever ways of using Excel and macros, but at some point, we just couldn't use it anymore."

"The volume of orders was getting really high and we weren't being that efficient." Adds Nick Tulip, Director of Technology, "The more orders we had, the more demand increased for either hiring people or we had issues with scheduling the work."

ERP Solution

Acumatica Manufacturing Edition

Connecting its QUIPS ordering system was the top priority for a new system. Q-PAC also wanted a cloud-based system with multi-region support and a system that could scale and allow them to customize unique processes. "We didn't want to adapt to a tool," says Burgos. "We wanted to have a great tool with a good base that we could modify a little bit and customize for our use."

Q-PAC evaluated Microsoft Dynamics, Odoo, and Oracle NetSuite, and then learned about Acumatica. They narrowed the list to Dynamics and Acumatica, choosing Acumatica for its unlimited user pricing, open API, and ease-of-use. Acumatica Manufacturing provided a single source of truth, and the flexibility to integrate third-party applications.

In Acumatica, "you could see the integration capabilities that were exposed and available," Tulip says. "And it became a no-brainer. Acumatica had some things that we did not even think about that we might need. The open API was the driving factor for us. And price was a significant factor." "Everybody else had a user per seat license and it was ridiculous, but Acumatica had unlimited users and was transaction based," he explains.

Early on, Q-PAC was considered an All-Microsoft shop. Still, the enterprise-grade price of Dynamics and its seemingly overly complicated implementation for a small startup made them reconsider that move. "I thought it was going to be an expensive experience, and if we failed to integrate outside applications properly at the cost that it had just didn't make sense," Tulip says. From a technical perspective, several executives said that Acumatica had everything Q-PAC needed to integrate and operate. "Once I learned more about how Acumatica worked and the architecture behind the pages where we see the data and how all of the data is connected in the background, and how we can access it and make it available for others via different generic inquires, that's when it clicked," Burgos says. "I realized it was going to be super, super easy to use because we could customize it however we wanted and see the data that we needed."

Customer Success

As a startup, executives created new workflows with help from I-Tech Solutions, Inc., its integration partner. "We needed to set up our customers, our business accounts, customer accounts and other items," says Tulip.

Once everything was set up and configured, the company moved over two years of data from its many spreadsheets. "The transition process to Acumatica involved understanding the different concepts like sales orders, bill of materials, vendors, inventory, stock items, and non-stock items to configure the different endpoints that allowed us to port data over," Tulip says. "It was actually rather smooth."

Outcome

Automated Processes Save Time

Q-PAC gained instant access to a single record of information that used to take days to find and compile—if executives could find it among many spreadsheets. Reports can be run in real-time with accurate information, and executives better understand how the company is performing daily—not weeks or months after the fact. Faster access to critical data allows Q-PAC to operate more efficiently and flex as needed to address market changes.

"Previously, the information was spread out; nobody knew what the latest information was, and having to find it across different Excel files was very challenging," says Burgos. "Thanks to Acumatica and the integrations that we have, we get daily reports instantly, and monthly reports two or three days after the month ends. Having access to data anywhere, at any time, is key." Burgos likes that he can access customized dashboards from his smartphone no matter where he is. "I mainly use it for our dashboard just to know how the week is going and what's been produced," he says.

Improved Inventory, Production

Q-PAC now imports its design specs from QUIPS directly into Acumatica, which automates the process of creating the manufacturing requirements and work orders for the subassemblies that ultimately roll up into a final assembly. Acumatica provides visibility so everyone sees whether components are in stock and what capacity is needed for a project. Acumatica allows Q-PAC to see accurate inventory and production costs, which allows executives to calculate the project profitability correctly.

"There are no more Excel files, and no more errors," Tulip says. "Prior to Acumatica I had to manually

transcribe things into a spreadsheet and use a search feature to try to find an order and what its status was," says Randall West, Operations Manager. "Now, I open a window and take a look at it and don't spend 45 minutes searching. We can actually track what we can do now."

Order status was mostly a guess previously, he says. "In terms of personal productivity, Acumatica probably saved me years of my life. I think there's a lot of time saved in inventory management, and now (the shop floor) has confidence that when they start an order, we're not stalled for three weeks waiting for a part because we didn't realize we needed it."

Acumatica provides the inventory forecasting and management Q-PAC lacked previously.

"We haven't missed an order, or we haven't skipped an order because we ran out of components in a long time," Burgos says.

Piro Zisi, Supply Chain Manager, says he's dramatically reduced the time it takes to access important data now that he doesn't spend time transferring data and then manipulating it. "I receive data for vendor on-time delivery, inventory, dollar amounts per item, what type based on the component, and which items are below safety stock levels," he says. "This information is updated in real time on a dashboard."

"The data is uploaded right away with a click of a button so I can devote more time on important issues and objectives." Having Acumatica as our ERP system, it has allowed us to get real-time visibility into all aspects of our organization," he adds. "We are able to make strategic decisions faster using Acumatica. It creates improved collaboration across departments, which has been really helpful."

In terms of personal productivity, Acumatica probably saved me years of my life.

Accurate Bill of Materials

Austin Pleasants, Product Engineering Manager, says Acumatica gave them bill of materials information that they didn't have previously. "We can now handle different (product) revisions and make sure that production is producing the right order, and compare it to the revision and see if there are any differences."

Design changes happen faster, and BOM is much more accurate. "Every job that we make is different," Pleasants explains. "Everything's unique. We have different dimensions every single time, different arrangements. So that means our bill materials are different for every project. The open API allows us to integrate our CPQ with Acumatica to create a different BOM for every order and allows us to group a bunch of different products and stock items together in a specific arrangement to match exactly what the customer wants."

More Efficient Warehouse

Q-PAC is modifying its warehouse to include four or five different internal locations for item inventory and adding a support-related section so the team can better understand item utilization for customer orders or support tickets. The company is also reconfiguring inventory to be closer to workstations to reduce the time needed to pick parts.

Q-PAC has also streamlined its shipping processes, providing the logistics manager with advanced information on production competition and shipment preparation. The data is also available to the accounting department, which prepares and sends invoices.

In addition to the QUIPS integration, Q-PAC added Velixo Reports for advanced financial reporting and EBizCharge for credit card processing. The company plans to automate customer notifications when their orders hit milestones, which can boost customer satisfaction and experience.

Fast Growing Manufacturer

Transitioning from a small company limited by simple processes to being a standard manufacturer, everyone now "has a full understanding of why we needed new processes like having part numbers, whether or not it's going into work-in-progress, where it ends up, and how it plays into the big picture," says West. "Acumatica has helped us learn how to operate the right way and to pay attention to processes we weren't paying attention to that are super important."

According to Burgos, Acumatica will allow Q-PAC to ramp up production by 5 to 10 times if needed. "I don't think that Acumatica will ever be a limitation. Our data visibility is great, and we have a scorecard that we use every day where we see how we're doing daily, monthly, and year-to- date."

More importantly, "It makes our life much easier," Burgos says.

AAFMAA

Investing wisely in digital transformation

Meet the Customer:

The *American Armed Forces Mutual Aid Association* (AAFMAA) is the longest-standing not-for-profit military aid association. It provides current and former military families with affordable financial solutions, including life insurance, wealth management, mortgage services and Survivor Assistance Services. Its service-focused employees manage investments in excess of $1.2 billion. Forty-two percent of AAFMAA's employees are military related.

Challenges

- Need for new digital services
- Pressure to attract new generation of members
- Business anchored in legacy IT systems
- Rip-and-replace project too costly and risky

Outcomes

- Modernized IT environment
- Protected existing investments in IT assets
- Realized 50%+ savings in operating costs
- Launched mobile self-service to 120,000+ users
- Improved member services and user experience

Benefits

- Database management system powered by Adabas
- Application development powered by NaturalONE
- Application modernization powered by webMethods EntireX, Adabas & Natural

> "Through our modernization efforts we have greatly improved our business processes. We also reduced our operational costs by more than 50%."
>
> - Amarish Pathak, Chief Information Officer at American Armed Forces Mutual Aid Association (AAFMAA)

Application modernization with the Adabas & Natural 2050+ initiative

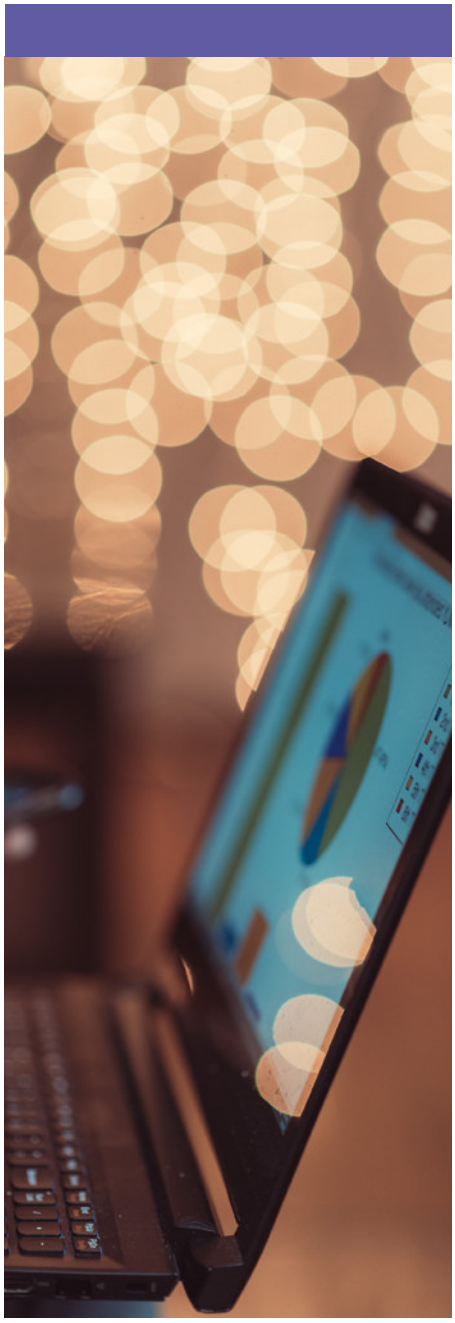
The member-owned AAFMAA serves "soldier, airman, sailor and marine"—more than 90,000 of them actually. And its services are crucial. In one recent year it helped more than 16,000 survivors obtain 100 percent of their entitled benefits.

AAFMAA provides all its services, including investments, without charging a single cent in commission. Keeping operating costs low and services efficient is, therefore, business critical for AAFMAA. Not only that, but every dollar saved goes directly back to work for its members.

Tech-tock goes the clock

It's commonplace for companies to feel that their IT is no longer cost effective or able to meet business demands. Legacy system complexity gobbles up resources, stifling innovation and slowing new service introduction. More in and less out.

AAFMAA faced just such a situation. It needed to innovate and change because the old ways of doing business simply didn't appeal to the new digital generation. Digital business transformation was the answer, but IT could barely handle current business needs.



Rip-and-replace projects often seem like the only answer. But getting rid of old systems means losing decades of investments. Worst of all, these expensive multi-million dollar projects come with no guarantee of success. As a practiced investor used to managing risk, AAFMAA didn't like these odds.

Trusted partner

AAFMAA needed a solution that lowered costs while enabling them to better attract new members. Following an assessment of its environment, Software AG committed to solving AAFMAA's problems.

AAFMAA is Software AG's oldest U.S. customer. AAFMAA first brought Software AG on board in 1974. All insurance and financial services as well as mission-critical applications were being run by Adabas & Natural. Working with AAFMAA's new outsourced IT provider, MetroStar Systems, Software AG helped transition to a Linux®/UNIX®/Windows® environment on open systems. Costs dropped by more than 50 percent.

2020 vision

Technology-driven cost reduction was just the first step. To grow the business, AAFMAA needed to update its offerings. With this goal in mind, it launched "AAFMAA 2020," a multi-year initiative that would introduce a full complement of services suited to the changing needs of members over their lifetimes. Membership would also be opened up to all services and ranks. And coverage would be extended to immediate family members, even grandchildren.

None of this could be pulled off without the right technology to support it. Understanding what

AAFMAA truly needed, Software AG and MetroStar Systems recommended a continuous IT modernization practice. Software AG's EntireX was the right tool for cost-effective IT modernization. NaturalONE enabled rapid application development and upgrading using EclipseTM, the most widely used Java® integrated development environment.

Leveraging core systems in new, modern ways

"With minimal effort, we installed the Adabas & Natural application modernization platform to build new web and mobile applications quickly and modernize current applications," said Ali Reza Manouchehri, co-founder and CEO at MetroStar Systems. "Most importantly, we did not need to change code, saving testing and validation time, enabling our team to realize savings faster. AAFMAA recouped its investment faster than planned, realizing ROI in the first five months instead of the expected year. In just 12 months, AAFMAA saved 40 percent in both batch processing and online processing costs."

MetroStar Systems went on to modernize the AAFMAA website. Then, in 2016, it launched omni-channel service delivery featuring a self-service offering via web and mobile. With it, members could access products and services anywhere, anytime, any place.

Better serving those who served

By modernizing legacy systems instead of replacing them, AAFMAA successfully implemented "AAFMAA 2020" a full four years ahead of schedule. Now, with the new leading-edge Adabas & Natural technology in place, AAFMAA continues to improve efficiency and member services. Cost effective and innovative, AAFMAA is outperforming the market, keeping members happy and staying ahead of the competition.

ERPNEWS